



Conceptual vision: View west from redesigned Twelve Apostles lookout



7.0 Consultation and Engagement

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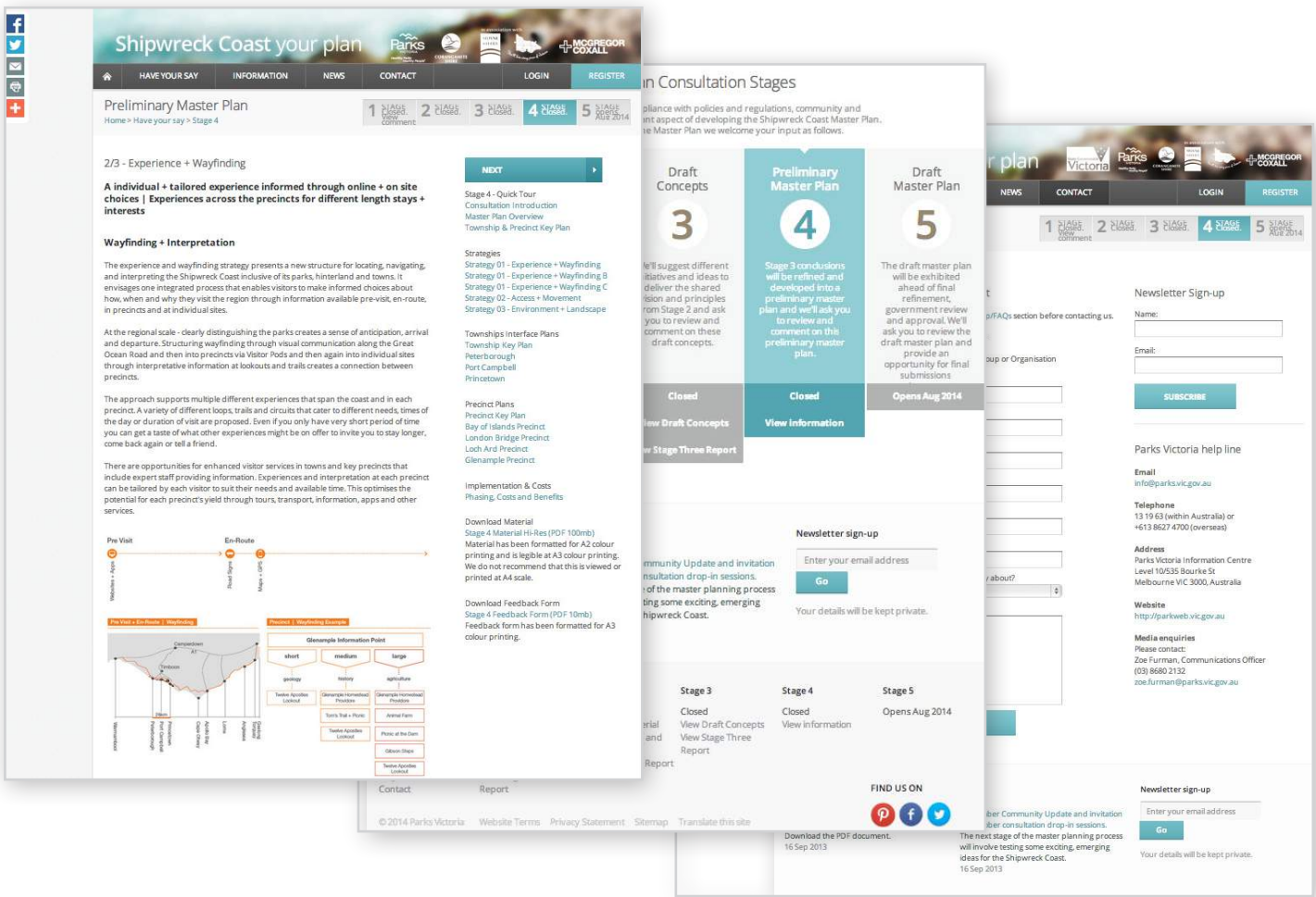
7.1 OVERVIEW

The engagement program provided an opportunity for the community and all stakeholders to meaningfully contribute to the development of the master plan and township interface and visitor precinct plans. Given the coast is a place of local, national and international significance, the program involved intensive local engagement along with web-based platforms to facilitate the participation of members of the wider community interested in the future of the parks.

The strategy was designed to meet the following communication and engagement objectives:

- To enable a diverse range of community values, priorities and expertise/local knowledge to inform the development of the master plan;
- To understand the present range of visitor experiences and aspirations;
- To facilitate the participation of the Shipwreck Coast's many "communities of interest" in the study process; and
- To promote a shared understanding and dialogue around issues and opportunities relating to the parks.

While community and stakeholder feedback was critical in shaping the evolution of the plan, it is important to note it is one of many inputs to the preparation of the eventual master plan.



Shipwreck Coast 'Your Plan' consultation website platform



Stage 2 Community workshop in Port Campbell

7.2 WHAT WE DID

Engagement program

Consultation featured across all stages of the development of the master plan, culminating in Stage 5 with the exhibition of the draft master plan. More than 50 meetings, briefings, workshops and presentations were held and there were over 30,500 hits on the Your Plan website.



Engagement tools and techniques

The engagement approach for developing the draft master plan was characterised by a multi-tiered consultation platform that comprised the following:

- Interactive custom-built project website (shipwreckcoastyourplan.com.au) which enabled the community to comment throughout the consultation process. At each stage, new information was loaded on the website with a comment period of 3-4 weeks. There were over 5000 users;
- More than 20 community and stakeholder workshops, information and briefing sessions along the coast and in Melbourne were undertaken to develop the vision and principles, and to review options for the master plan;
- 3 periodic project reviews were undertaken by the Office of the Victorian Government Architect’s Victorian Design Review Panel;
- Site visits and stakeholder meetings to ensure the project team gained an in-depth contextual understanding of the various sites and priority issues;
- There were 9 informal drop-in sessions within coastal villages and towns to disseminate information widely and to gain feedback from the public;
- Requests for feedback and detailed submissions at all stages. These were received via Your Plan, written submission, emails and telephone calls;
- There were 8 focused workshop sessions with subject matter experts from different government agencies and departments with responsibilities in the area as well as the newly formed Great Ocean Road Regional Tourism Board which has provided valuable guidance; and
- National, regional and local newspapers, project postcards, articles in community newsletters and posters in local shops were used to raise awareness of the project.

The following table outlines the various types of engagement activities that informed the development of the master plan along with the groups and communities that were involved.

Stage	Stakeholder Briefings Shipwreck Coast	Stakeholder Meetings- Melbourne	Community Workshops and Information Sessions	Your Plan project website
01	<div>– Local Parks Victoria staff</div> <div>– Adjacent landowners</div>	<div>– Government agencies</div> <div>– Tourism & bus operators</div> <div>– Park user groups</div>	<div>– Community workshops in Port Campbell, Peterborough and Princetown</div> <div>– Traditional Owners</div>	<div>– Mapping</div> <div>– Survey</div>
02	<div>– Local Parks Victoria rangers and operational team</div>	<div>– Victorian Design Review Panel</div>	<div>– All communities workshop in Port Campbell</div>	<div>– Local Your Plan Kiosks</div> <div>– Surveys</div> <div>– Submissions</div>
03	<div>– Local Parks Victoria rangers and operational team</div> <div>– Farmers and landcare groups</div> <div>– Local heritage and environmental groups</div> <div>– Local tourism operators</div> <div>– Shire Council briefings</div>	<div>– Government agencies</div> <div>– Tourism & bus operators</div> <div>– Park user groups</div> <div>– Victorian Design Review Panel</div> <div>– Conferences and seminars</div>	<div>– Peterborough</div> <div>– Port Campbell</div> <div>– Twelve Apostles Visitors Kiosk</div> <div>– Princetown</div> <div>– Open Room Parks Victoria offices, 3 weeks</div> <div>– Traditional Owners</div>	<div>– Local Your Plan Kiosks</div> <div>– Online submissions</div> <div>– Email and written submissions</div>
04	<div>– Local Parks Victoria rangers and operational Team</div> <div>– Farmers and landcare groups</div> <div>– Local community focus group</div> <div>– Peterborough Residents Association</div> <div>– Shire Council briefings</div>	<div>– Government agencies</div> <div>– Tourism & bus operators</div> <div>– Park user groups</div> <div>– Victorian Design Review Panel</div> <div>– Conferences and Seminars</div>	<div>– Peterborough</div> <div>– Port Campbell</div> <div>– Timboon</div> <div>– Princetown</div> <div>– Open Room Parks Victoria offices, 3 weeks</div>	<div>– Local Your Plan Kiosks</div> <div>– Online submissions</div> <div>– Email and written submissions</div>
05	<div>– Local Parks Victoria rangers and operational team</div> <div>– Peterborough Residents Association</div> <div>– Shire Council briefings</div>	<div>– Government agencies</div>	<div>– All communities workshop in Port Campbell</div> <div>– Traditional Owners</div>	<div>– Local Your Plan Kiosks</div> <div>– Online submissions</div> <div>– Email and written submissions</div>

7.3 WHAT WE HEARD

Consultation with Traditional Owners

During the development of this master plan, Parks Victoria facilitated a number of meetings with representatives from the two established Traditional Owner groups within the study area, Kuuyang Maar and Eastern Maar. As part of that process, the following principles were developed:

- The term 'Traditional Owners' describes a broad range of individual people, communities and organisations. Traditional Owners may have different or competing views and interests, recognition and legislative authority. All wish to have a voice in the future of the 'Shipwreck Coast'.
- Traditional Owners support in principle the objectives of the Shipwreck Coast Master Plan, particularly the need to protect cultural and environmental values while building the economic and employment opportunity for Aboriginal people, and others living within the region.
- Traditional Owners view the master plan and its initiatives as an opportunity for Aboriginal employment and business across all aspects of implementation, operation and service delivery.
- Traditional Owners expressed a strong interest to be part of the decision making group, charged with responsibility for implementation of the master plan.
- Traditional Owners seek a better model for park management which provides a sustainable stream of funding for research and conservation of cultural values, and their interpretation. Partnership with Traditional Owners is required to ensure this work is funded, that intellectual property is protected when story and traditional knowledge is gathered, and when interpretation and tourism business linked to that information and knowledge is established.
- A stronger emphasis on researching and interpreting Aboriginal cultural values, alongside the existing shipwreck and geological stories, is required.
- Capacity building for Traditional Owner business requires long-term investment, with the experience of young people developed over time as cultural tourism operators, food and accommodation services.

An approach that connects Traditional Owners, potential investors and key stakeholders, is viewed as sensible and desirable. Commonwealth, State and Local Government, private and philanthropic interests should see partnering with Traditional Owners as a sound business decision, with operations on-the-ground providing increased economy and employment.

Stage One – Issues and Opportunities

The early stages of the project were instructive and provided useful guidance to the team around local values, community aspirations, user group needs and some very detailed information on issues facing the parks. Some of the key things we heard in the stage one feedback included:

Importance of ecology and culture

- Protecting the region's extensive natural and cultural assets should be the prime focus of the master plan.
- Visitors should be informed about how they can help to reduce impacts on the environment before they arrive.
- Educating people about the history, ecology and geology of the coast is an important way of ensuring its unique value is recognised and appreciated.

Sustainable tourism

- The master plan needs to address sustainable tourism and ensure that visitors contribute positively to communities along the coast.
- Providing better tourism infrastructure that complements the existing character of the towns will be a key challenge.

A richer visitor experience

- The master plan should aim to provide a richer and more engaging experience for visitors to the Shipwreck Coast.
- The plan should not necessarily focus on attracting more visitors but should encourage them to stay longer in the area to help strengthen the local and regional economy.

Quality infrastructure

- Any new buildings and infrastructure should be low scale, complement the landscape and be of a design quality that matches the stunning environment.
- Buildings and infrastructure should also be capable of managing high numbers of people in particular locations.

The feedback from this stage was referenced in the development of the master plan objectives.



Stage 1 Stakeholder workshop in Melbourne



Stage 1 Community consultation in Peterborough

Stage Two – Vision and Principles

In stage two, the focus turned to exploring a set of master plan objectives and what community and stakeholders thought would be the most important considerations in achieving these objectives.

Objective One: Conserve and protect the national and coastal parks

- The Coast’s ecology, landscapes and heritage primary values need to be protected.
- The importance of the marine park needs to be elevated.
- The master plan should be judged by its consistency with this primary value.

Objective Two: Support and enrich the Coast’s local and hinterland communities

- The Coast and hinterland are parts of an integrated environmental system and a continuous visitor experience.
- The low-key nature and character of the coastal communities needs to be protected.

Objective Three: Create a world-class destination and a distinctive visitor experience

- Encourage visitors to stay longer and deepen their experience of the coast through connecting with local people and listening to the varied stories of this unique part of Australia.
- The Coast is already a world-class destination and the focus should be on how the landscape is managed and maintained.

Objective Four: Benefit from tourism

- Highlight local produce and local creativity.
- Cater for a wider range of visitors including for longer stays and in the off season.
- Local communities are the ‘heart of the coast’.

Objective Five: Create long-term value for Victoria, its south-west region and the local communities

- Reservations were expressed about the potential for over-commercialisation and privatisation of the parks.
- Development on park land should be limited to what is necessary to manage visitor impacts i.e. boardwalks, trails and viewing areas.
- Any more substantial development should occur north of the road and well outside of the park.
- If development is to occur close to the park, it needs to be of high quality, consistent with park values and not impinging upon the landscape.

Stage Three – Draft Concepts

This stage involved the presentation and testing of a package of different initiatives and ideas for the master plan study area.

Ideas that were generally supported included:

- The vision put forward for each township or interface.
- Improved walking and cycling loops from each township.
- A dispersed interpretation approach in lieu of a single, centralised tourism hub.
- Sensitive, low-impact infrastructure within parks that is limited to what is absolutely necessary.
- Developing the Shipwreck Coast as a regional product to encourage longer/increased visitation and improved visitor distribution.
- High-quality, well-designed infrastructure including boardwalks, walkways and lookouts.
- A parks/local shuttle/transport system operating between towns and key destinations.

Some of the ideas that were not well supported were:

- The proposal for a wedding chapel on the closed section of the Great Ocean Road at Port Campbell.
- Development on the rifle range.
- Camping in the dunes at Princetown.

Some ideas that received a mixed response were:

- Introducing charges for parking.
- An alternative inland touring route to alleviate pressure on the Great Ocean Road, improve safety and reduce environmental impacts on the parks.
- Bus operators were concerned that encouraging visitors to stay longer would impact poorly on their businesses, as day trips are currently their key product.

New ideas that were put forward included:

- Local farmers and Heytesbury Landcare suggested that the master plan establish the foundation for a voluntary all-of-coast Landcare program between Parks Victoria and the farming community.



Stage 3 Community workshop at the Twelve Apostles Kiosk



Stage 4 Community workshop in Princetown

Stage Five – Draft Master Plan

Feedback from Stage Five on the Draft Master Plan included:

General feedback

- There was broad support for the master plan’s vision and strategies.
- People wanted to understand the master plan’s implementation and funding (who, timing, priorities, access arrangements).
- The role and function of the master plan versus a plan of management has been an ongoing question.
- Some people felt that the master plan still needed to be clearer on how it responds to climate change and protecting and conserving the environment.
- The need, role, function and potential location of private sector investment opportunities in the national parks were questioned with some members of the community pointing to private land holdings to the north of the park to serve this purpose.

Tourism

- The proposal for the golf course identified during the Peterborough workshop in Stage One of the master plan process was not supported by some local residents and has been removed from the plans.
- Camping was seen as a good idea and an affordable overnight option along the Shipwreck Coast.
- Experiences and services comprising boutique spas, the Glenample helipad and Port Campbell’s Wedding Chapel* were not supported (* the wedding chapel did not form part of Stage Five following feedback in Stage Four).
- The economic yield and benefit for local precincts as a result of tourism is highly supported – where towns can contribute as tourist centres.
- There was some concern from bus and tourism operators that existing products will need to transition to suit the proposed experiences, access and circulation.
- There were mixed views on any parking and entry fees. These ranged from being supported as a means of providing economic yield and benefit for the management and maintenance of the parks and its infrastructure through to not being supported at all.
- Some people commented on the need for the park and ride / shuttle bus system to be carefully thought through, highly organised and managed for peak periods.

Buildings and Infrastructure

- Some people perceived the illustrative concepts for some visitor infrastructure to be potentially too visually dominant in the landscape while others felt there needed to be more of a “wow” factor.
- People also suggested that any new infrastructure or upgrades of existing infrastructure must go through rigorous site planning, have minimal environmental impact and be of an exceptionally high standard of design and environmental performance.
- The shelters, decks and small café proposed in the Peterborough town green were not supported by some people in the local community and have been removed from the plans.
- There was broad support for the co-location of visitor services and associated infrastructure around the Glenample Precinct.

Natural and Cultural Values

- Engagement and ongoing detailed input by Traditional Owners is seen as critical to the master plan’s successful implementation and to optimise the benefits associated with the project.
- The priority to conserve, protect and repair existing ecology is highly supported. This is seen as a major feature for visitation and to open up people’s experiences and understanding of the parks.
- Some people felt that there was real risk that any infrastructure proposals would increase in rubbish, alter the landscape and erode habitat in what is a very fragile place.
- The broad strategy regarding the area’s re-vegetation was seen as positive by some people but others questioned how this would be undertaken.
- The promotion of activities to attract people to spend more time in the area is perceived by some as having potential to erode the landscape and its ecosystems.



Stage 5 consultation at Port Campbell

Stage Four – Preliminary Master Plan

Feedback in Stage Four on the Preliminary Master Plan included:

Buildings and Infrastructure

- Generally, there was a view that infrastructure within the parks should be minimised to what is essential to manage visitation and conserve the parks.
- Development of accommodation within the parks outside of sites already designated for these purposes was also not widely supported. The rationale provided was that the C30 sites already afford ample provision for development of accommodation.
- Where development is to occur within or in close proximity to the parks, stringent guidance should be given to ensure high levels of design quality are achieved to complement and respect the parks.

Access

- The access arrangements outlined in the master plan were generally supported, particularly the improved walking trails, better connections into regional walking and bike networks and the proposal for parking hubs out of but close to the park.
- The proposal for the combined transport corridor along the Great Ocean Road was not well understood.
- The plan should clearly indicate how access for people with disabilities would be improved.
- Strong support for the 12 Apostle Trail walking and cycling trail link.

Inland Route

- The inland route was tentatively supported, with people wanting to see more detail on the feasibility and actual location of the inland route.
- Safety concerns about conflict with farm-related vehicles were also raised.
- While the inland touring route was seen as an adjunct and relief valve for the GOR, some respondents noted:
 - The importance of maintaining direct vehicle access between the towns via the GOR;
 - The drive along this section of the GOR is a defining experience of the coast; and
 - Tourist coaches should continue to have access and parking provided at key destinations.

Ecology and Geology

- The relationship between the master plan and its objective to protect and conserve the parks’ ecology and geology attracted significant comment.
- Those who questioned this link stated the plan was predicated on a desire to commercialise the park and increase visitation at the expense of the environment and the scenic value of the parks.
- Others wanted to see a greater justification on how the proposals within the plan supported this objective.
- In addition to this general feedback a number of submissions raised matters related to environmental impacts of existing visitor activities on specific locations within and around the parks and townships and questioned if these could be effectively managed or were even compatible.

Whole-of-Coast Landcare

- The Whole-of-Coast Landcare program suggested by local farmers and Heytesbury Landcare was well received with some noting that it was already occurring.
- A few respondents expressed the view that this was asking volunteers and farmers to offset the damage caused by increasing levels of visitation.



Stage 4 Community Consultation in Timboon



Conceptual vision: The Princetown to Glenample trail



8.0 Economics, Feasibility and Cost Planning

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8.1 COST PLAN SUMMARY

The estimated total end cost of the collective initiatives outlined in this master plan is nominally \$140 million (excl. GST), excluding the Coastal Hinterland Touring Route, and up to nominally \$178 million (excl. GST) including the Coastal Hinterland Touring Route.

The cost planning work undertaken is based on high-level conceptual work and design resolution contained in this master plan. Therefore, it is indicative only of the possible order of cost. All components of the cost plan will require confirmation once further detail and resolution become available.

The cost plan, updated as at February 2015, includes a list of 72 projects and associated, contingencies, escalation for time and other allowances for locality and site conditions. Allowances have also been included in the cost plan for fees and charges associated with each project. These projects are illustrated on the next page with a summary of the project cost planning.

There are several separate but related projects outside the scope of this master plan that may influence implementation and the sequence and timing of its projects. The projects include:

- 12 Apostles Trail between Port Campbell and Princetown – \$7.8m; and
- The services upgrade (sewer, power, gas and water) to the Twelve Apostles Visitors Centre – \$15m.

Project Cost-Planning Summary Table

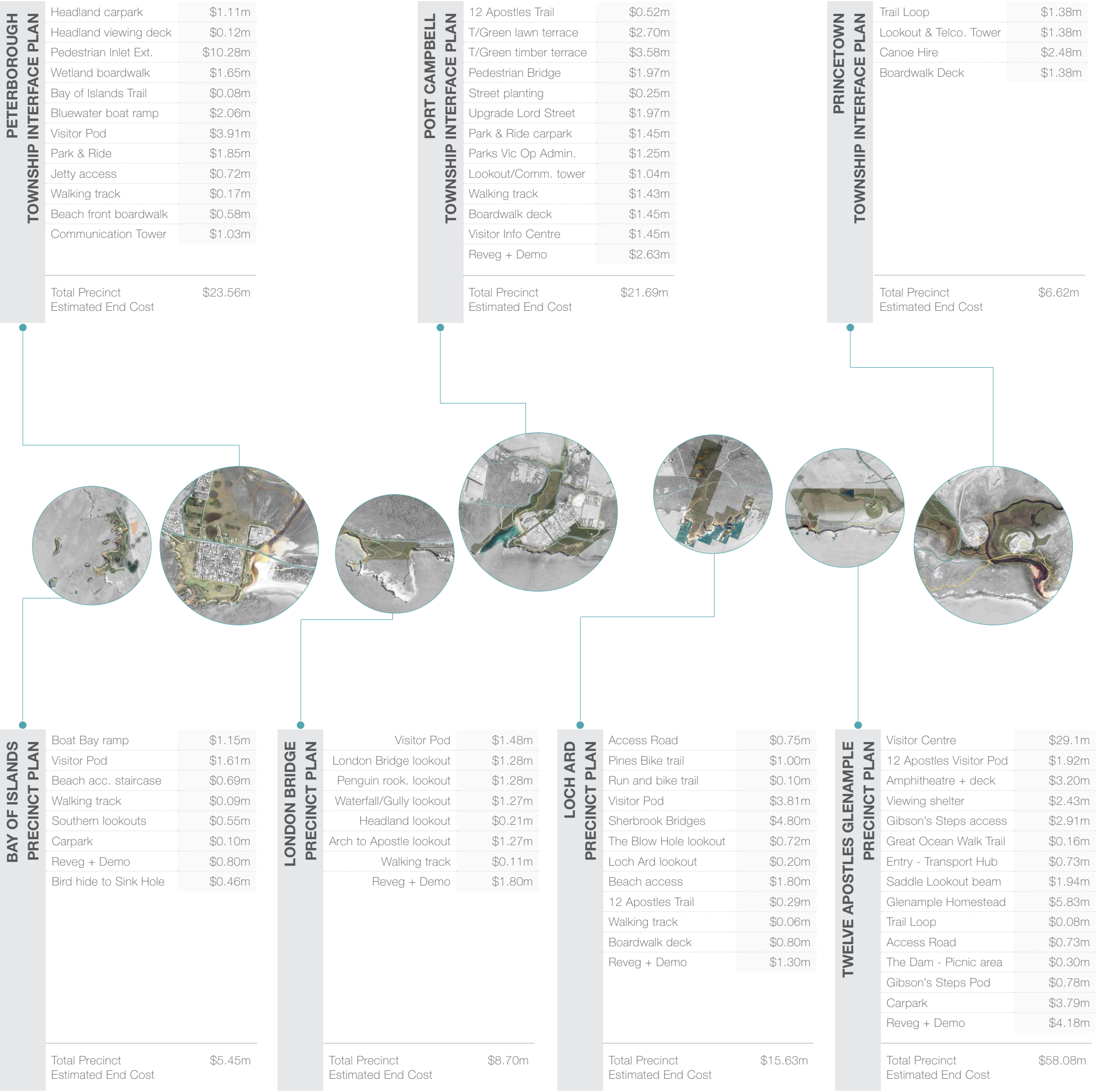
Total Building Cost (at May, 2014)	\$116.5 million
Project allowances (Precinct + Township Interface Plans)	\$13.65 million
Project contingencies (Precinct + Township Interface Plans)	\$9.90 million
Total Estimated End Cost (at May, 2016)	\$140 million
Coastal Hinterland Touring Route Allowance	\$38 million
Total End Cost (including Coastal Hinterland Touring Route) (at May, 2016)	\$178 million

All project costs included in Section 8.1 are exclusive of GST.



Port Campbell Harbour

Disposition of the Master Plan’s 72 projects



The figures provided for each project listed in the various visitor precincts and township interface plans above are estimated for total end costs (TEC). Each project’s TEC figure typically includes numerous contingencies, allowances, fees, head works and locality factors associated with each project. Each precinct and township interface plan also has general allowances for ancillary works that would be considered typical for projects of this nature as well as contingencies for these allowances. These factors will need to be referenced in reviewing costs for an individual project or group of projects.

8.2 FEASIBILITY AND ECONOMICS

Visitor Forecasts

A range of studies have examined the tourism offer and potential for the Great Ocean Road and the Shipwreck Coast. The following section draws together the findings to identify key opportunities for the Shipwreck Coast.

Enhancing the Accommodation Offer

There is a shortage of suitable accommodation in the area and this will be exacerbated in the future as demand grows. Visitors prefer accommodation that is close to the ocean, provides ocean views and is within a rural setting.

Opportunities for accommodation, such as eco-lodges, that cater to nature-based tourism in key townships and/ or locations within or adjacent to the national parks could be explored. Specifically, there is a need for additional bed and breakfast establishments and resort accommodation.

Visitor retention can also be enhanced by improving the range and supply of activities for tourists. The following tourism development opportunities have previously been identified:

- Nature-based activities, e.g. eco tours, penguin tours, boat charters, guided walks and interpretation.
- Retail activities: a greater retail mix in the townships for tourists to explore, particularly in Port Campbell and Timboon.
- Geothermal spa and wellness tourism: expanding on the geothermal water in Port Campbell and potentially in other locations within the region.

The Analytical Framework

The analytical framework adopted for the study is illustrated in the adjacent figure.

The current situation is represented. There is a national tourism market and the study area with its current ‘offer’ achieves its current market shares and hence the existing levels of visitation and spending.

In the future there is the prospect of filling the gaps in the offer, which will increase market shares resulting in increased visitation and spending.

There is also the prospect of enhancing the offer, which will create further growth. Importantly, there will be a ‘feedback loop’ in that filling the gaps and enhancing the offer will grow the national tourism market. In other words it will result in higher levels of visitation to Australia, given that the area is one of the nation’s highest profile tourist attractions.

Current Visitation and Future Prospects

The Great Ocean Road (GOR) is one of the pre-eminent nature-based tourism destinations in Australia and the Shipwreck Coast is a key component of the GOR experience.

The table below shows that domestic day trips make up the lion’s share of visits to the Great Ocean Road West region (GOR West) and the Shipwreck Coast captures a very small number of overnight trips. This is consistent with the very low levels of spending in the region, particularly within the Shipwreck Coast.

Market Segment	Shipwreck Coast	SW Coast / GOR West	GOR West
Domestic Day Trip	874,889	36%	2,426,889
Domestic Overnight	75,667	5%	1,540,444
International Day Trip	300,000	42%	720,200
International Overnight	24,673	19%	131,911
Totals	1,275,228	26%	4,819,444

Market Segment visitation and financial contribution
Source: Tourism Victoria and Consultant estimates

Domestic visitors to the Shipwreck Coast travel almost exclusively by private car. International visitors travel mainly by rental car/ van or motor home, with buses and coaches catering for the packaged day trip market.



Great Ocean Road West region including the statistical study areas of Corangamite North and Corangamite South



Project feasibility and yield methodology

In 2012, domestic day visitors to the GOR (excluding Geelong) reached 2.6 million. This figure has been adjusted slightly to reflect recent studies. International visitors, while fewer in number than domestic visitors, stay longer and spend more per capita. Visitation and spending market shares may be increased by:

- Converting some domestic day trips to overnight trips;
- Converting some international day trips to overnight trips;
- Lengthening the stay and increasing the spend for day trip visitors; and
- Growing the international market for Australia and the region's market share.

Despite expected growth in short-stay trips to the Twelve Apostles and nearby coastal features, official forecasts for the Shipwreck Coast and for the wider region show a drop in visitation of around 1% per year. At this rate, the current 4.8 million visitors per year can be expected to drop to 4.6 million visitors per year. This will have significantly adverse consequences for the local economy, jobs and the prospects of retaining youth in the area.

Role of the Master Plan

The role of the master plan is to turn this downward trend in tourist visitation around by creating opportunities for growth through investments, both public and private, in the region's tourism infrastructure.

It has long been recognised that the Shipwreck Coast suffers from low economic yield from the considerable number of visitors each year. Length of stay is short and spend per visitor is low. Visitors place demands on infrastructure and the environment, but leave little behind by way of contribution to the regional economy.

The master plan proposes a suite of complementary initiatives, which will reposition the region as a 'must see' tourist destination on the world stage. The measures contained in the master plan break from the tradition of proposing a mega project that promises to be the 'silver bullet' that can change visitation patterns in one go. Rather, the comprehensive suite of measures fills identified gaps in the tourism offer and builds on the area's comparative advantages. It can be implemented over time in a cost effective manner.

Target Market

The target market is a broad group labelled 'experience seekers'. This group can be found in any age group, income range, stage of life, in different countries, including the growth markets of China and India. They are adventurous and self-motivated, love the outdoors, and are ecologically minded. They seek:

- Something different and unique;
- Natural, untouched environments;
- Opportunities for life-changing experiences;
- To understand and experience local culture;
- To discover something new;
- To see the real Australia;
- To gain knowledge;
- 'Bragging rights'; and
- Value for money.

Experience seekers as a group are comprised of opinion leaders and advocates within their social circle. They share their holiday experiences with peers, colleagues, friends and family. Their influence and positive word-of-mouth can secure a return stream of like-minded visitors into the future. They hold the key to making the Shipwreck Coast and the surrounding region a must-do destination when travelling within or visiting Australia.

Experience seekers are known to immerse themselves in the following activities:

- Aboriginal tourism;
- Adventure;
- Arts and cultural heritage;
- Backpacking;
- Caravanning and camping;
- Hiking and cycling;
- Events;
- Food and wine;
- Golf;
- Nature-based tourism;
- Shopping; and
- Spa and wellbeing.

All of these activities are potentially catered for in the Shipwreck Coast master plan area.



Walking the Great Ocean Walk, photo from kgrahamjourneys.wordpress.com

Estimating Future Potential Uplift in Visitation

The catalyst for growth will be investment by the public sector in the tourism infrastructure of the area. However, the key to success will be to mobilise private investment to provide the much-needed accommodation and hospitality services. The public sector’s investment is a necessary precursor to this. Visitation uplift is projected to occur as a result of:

- Filling observed gaps in the existing tourism offer (accommodation is a critical issue).
- Enhancing the offer with the suite of integrated measures as formulated in the master plan.
- Further rounds of growth as the attractiveness and profile of the destination gains national and international recognition – with consequent increases in visits to Australia.

The estimate of potential uplift in visitor numbers adopts 2034 as a target date on the basis that this represents a reasonable time frame to fully implement the master plan.

The steps in the method are:

- First – apply official forecasts to the market segments to provide the ‘base case’, where there is a drop in visitor numbers over the next 20 years. The segments comprise:
 - Domestic Day Trip;
 - Domestic Overnight Trip;
 - International Day Trip; and
 - International Overnight Trip.
- Second – increase future growth in visitation in line with official forecasts for Victoria to reflect the improved performance of the Shipwreck Coast with enhanced facilities.
- Third – increase the length of stay towards the current average for the Great Ocean Road area to reflect the improvements in the accommodation offer.
- Fourth – increase the average spend per visitor on the basis that length of stay is longer and opportunities to purchase goods and services are expanded.

These steps are applied to the Shipwreck Coast Master Plan area and the wider region (balance GOR West) separately.

By application of this method, it is estimated that the ‘without master plan’ scenario will see a 5% drop in visitation by 2034 in the region. With full implementation of the master plan and with private investment coming on-line, there is a potential for a 38% uplift.

The uplift will be most pronounced in the Shipwreck Coast area but will still be highly significant in the wider region.

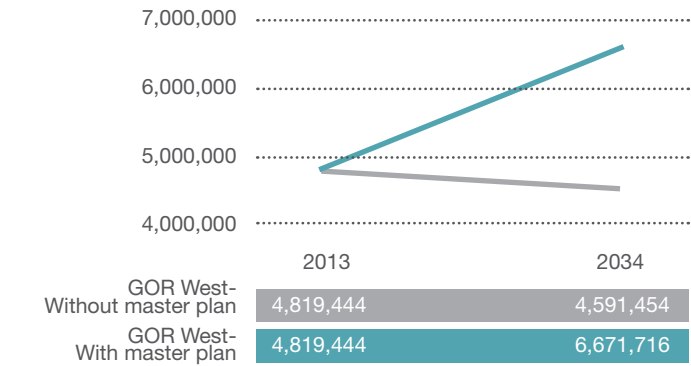
Accommodation

Accommodation Needs

In order to accommodate the additional visitors, new high-quality accommodation will be required. It is estimated that there will be a need for an additional 328 rooms in resorts, hotels, motels and backpacker hostels within and outside the parks in the Shipwreck Coast area, and a further 1,774 new rooms in the balance of the GOR West area.

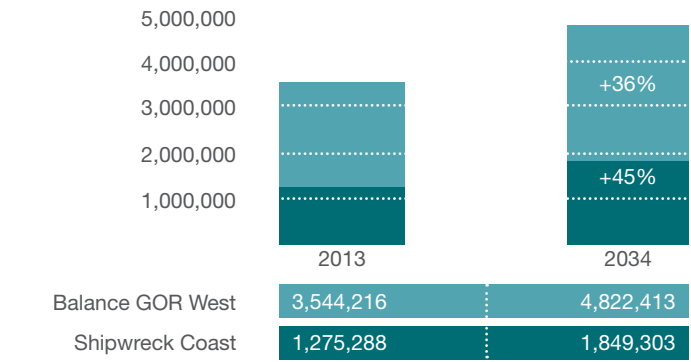
If the estimates for the Shipwreck Coast and the balance of GOR West are added together, the future need in GOR West is over 2,100 rooms. The likelihood is that Shipwreck Coast area will attract a greater share and could provide around 900 rooms. This accommodation should be targeted towards the upper end of the market, which is currently under-supplied. The master plan makes provision for these future accommodation needs.

Visitors per annum



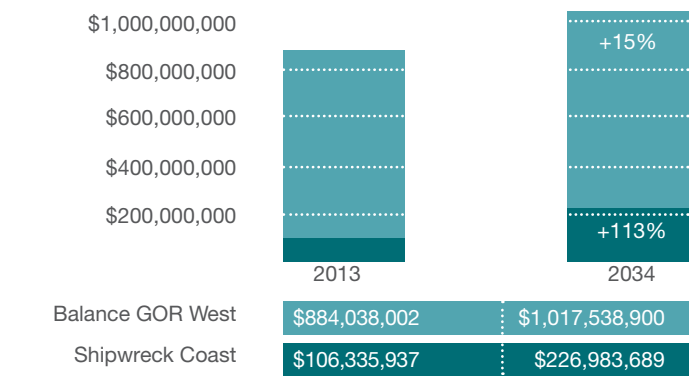
Forecasted visitor numbers to Great Ocean Road West with and without master plan. Tourism Victoria data and consultant analysis.

Visitors



Existing and forecast visitor numbers to Great Ocean Road and the Shipwreck Coast. SOURCE: SGS Economics & Planning

Visitor Spending



Existing and forecast visitor spending at Great Ocean Road and the Shipwreck Coast. SOURCE: SGS Economics & Planning

The Role of Eco-lodges

Eco-lodges differ from traditional hotels in that they are structurally designed to reduce environmental impact. Eco-lodges promote ‘eco-tourism’ which is defined as ecologically sustainable tourism with a primary focus on experiencing natural areas that foster environmental and cultural understanding, appreciation and conservation.

Eco-lodges must deliver a net environmental gain when they are established. During the consultation process, many people emphasised the need to develop visitor infrastructure, including accommodation, of the highest quality and environmental performance in order to attract the discerning international visitor market.

Perceptions of exclusivity are often cited as a negative aspect of eco-lodges. This issue may be addressed by:

- Ensuring the general public still has access to the features of the site – the views and the natural environment;
- Providing access to hospitality services with a range of prices; and
- Ensuring economic resources are applied to improve the park generally for the benefit of all visitors.

Importantly, eco-lodges have an ability to put an area on the international map as a must see destination for environmentally aware experience seekers. It has been estimated that this group makes up to 20% to 25% of the Australian market. On this basis, 180 to 225 eco-lodge rooms would be an essential addition to the accommodation offer.

In order to attract investment in eco-lodges, sites must be found where people can immerse themselves in the environment. A critical factor in attracting investors is to identify sites of exceptional quality.

Economic Benefits

Value Added to the Economy

By 2034 the Shipwreck Coast Master Plan will contribute to increases in visitor spending along the Great Ocean Road of \$254 million per annum. Of this \$66 million will be new (net) spending in Victoria drawn from interstate or overseas visitors rather than from other parts of the state with potentially \$214 million per annum added to the regional economy. Of this \$97 million will be new (net) value added to the Victorian economy from interstate or overseas visitors rather than from other parts of the state.

Increased visitor spending in a region adds value to the economy and creates jobs. There is direct value added, plus indirect value added through the multiplier effect. These effects have been estimated using economic modelling and the results are summarised in the table below.

It is estimated there will be nominally 2,300 jobs created in the GOR region by 2034. Of this it is estimated that 1,450 jobs come from increasing the region’s market share of tourist spending in Victoria and nominally 880 will be new jobs in the State. It is also estimated that an additional 1,570 jobs will be created through construction.

Economic Benefits - Uplift Area	Visitor Spending	Value Added			Employment Uplift		
	2034 Net Spend Uplift	Direct Value added	Indirect value added	Total Value added	Direct FTE	Indirect FTE	Total FTE
Shipwreck Coast total visitor spend	\$120,647,752	\$62,011,729	\$26,224,468	\$88,236,198	825	216	1,041
Balance GOR West total visitor spend	\$133,500,899	\$74,300,596	\$51,473,874	\$125,774,470	914	378	1,292
Total	\$254,148,651	\$136,312,326	\$77,698,342	\$214,010,668	1,740	594	2,334
Net to Victoria	\$66,286,843	\$37,690,065	\$59,116,974	\$96,807,039	464	420	884

Value Added economic table

Costs

It has been estimated (in ‘present value’ terms) that the projects contained in the master plan will involve in the order of \$140 million of capital expenditure over a 20-year period. When project management, operational and maintenance costs and the Coastal Hinterland Touring Route are added, the figure is closer to \$178 million, or an average of \$9 million per year.

Benefits

The master plan is a package which, when implemented, will bring about a fundamental change in the quality of the environment, the tourism experience and local economy over time. It is a multi-faceted plan that will deal with immediate practical issues relating to the management of public assets in the national park and the towns, as well as repositioning the area as a tourism destination. There will be clear benefits to be derived from additional tourism visitation and spending including:

- Direct economic benefits from income flowing into the regional economy, and the consequent ‘multiplier effect’, together with wider economic benefits from enhanced productivity;
- Social benefits including recreational, leisure, health and educational benefits to visitors from an enhanced visitor experience. There will be personal benefits from reduced accidents and avoided congestion and conflicts; and
- Environmental benefits including enhanced environmental values, landscape quality, habitat and biodiversity and reduced greenhouse gas emissions.

Ascribing a value to the travel time visitors endure provides a preliminary valuation of the economic benefits. To this can be added the value of recreational time spent in the area, plus the value of the uplift in the state economy.

Taken together, these measures estimate that the total present value of economic benefits is \$527 million. When divided by the present value of the costs (\$178 million) this indicates a ‘benefit – cost ratio’ of nominally 2.7:1.

Given that a benefit cost ratio greater than 1.0 indicates a project ‘worth doing’, this leads to a conclusion that the project is highly beneficial. This is a conservative analysis at this stage, as wider economic benefits, environmental benefits and social benefits have not yet been included.

Implementing the master plan

The Works Program

The master plan identifies 72 different projects which, when taken together, will reposition the area for investment that is consistent with the plan’s economic, environmental and social objectives. There are various potential options to implement the master plan, including:

- A decentralised approach that implements a suite of different projects spanning the study area’s 28 km to initiate momentum in each precinct and township interface;
- Focusing on a key initiative in one township and/ or precinct to pilot a project ahead of broader implementation;
- Targeting priority visitor infrastructure requiring renewal as a precursor to implementing a precinct; or
- A combination of the above.

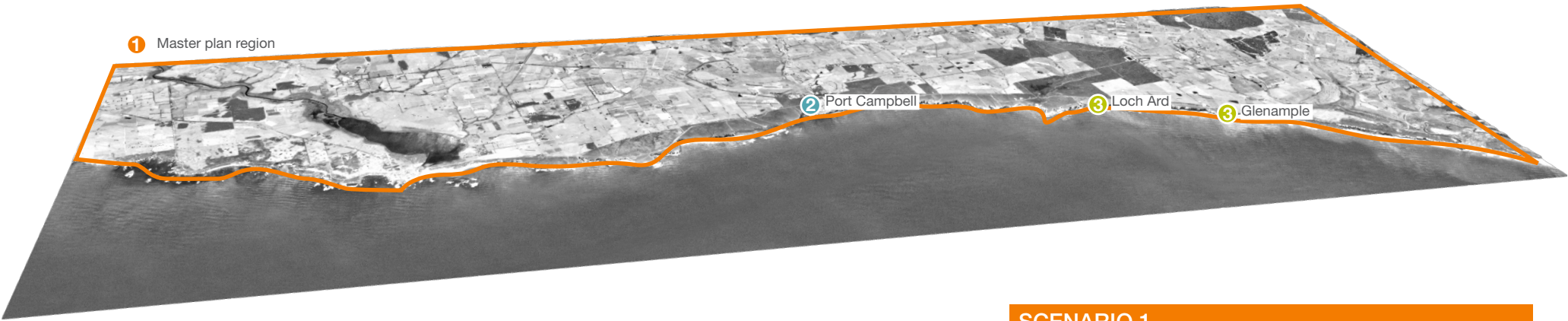
Many projects can be grouped into cohesive “packages” where there is a benefit in planning and delivering complementary and dependent works together.

Prioritisation

Extensive consultation has occurred with key stakeholders regarding the different ways in which works could be prioritised under the master plan. However, to maximise potential benefits, it is recommended that a commitment to the long-term vision and entire works program is required alongside targeted funds for the most urgent, highest priority works. To secure government funding, with the greatest opportunity to partner with and attract private-sector investment, a senior and experienced decision making group is required to lead the implementation of the master plan.

There are multiple combinations to how different projects and initiatives can be packaged as groups or delivered concurrently to optimise outcomes and delivery efficiency. Examples of different scenarios are provided on the next page.

Different projects and initiatives can be packaged as groups or as individual projects delivered concurrently to optimise outcomes and delivery efficiency. A project’s size, location and whether it is delivered individually or as a group will inform implementation. Many of the possible combinations of projects span different jurisdictions and responsibilities and may require cross-functional and whole of government support. Three scenarios are discussed here as examples to illustrate how projects could be treated as discrete initiatives delivered independently or as packages.

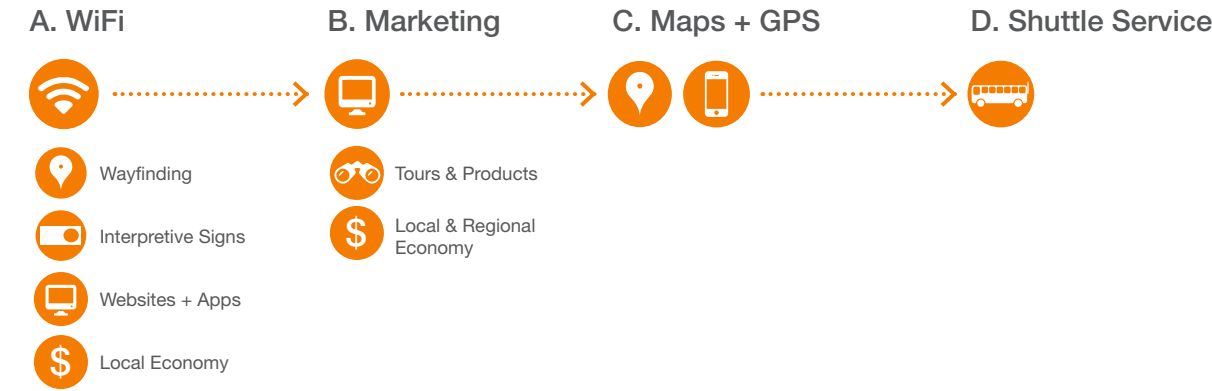


SCENARIO 1

Enabling Initiatives

The master plan’s implementation will require numerous enabling initiatives that support the delivery of other projects and strategies.

- A. Delivery of high quality broadband and WiFi enabled capabilities to the coast is considered critical to underpin the implementation of new interpretation, marketing, wayfinding and management services. Delivery of high quality broadband also directly supports local communities and businesses.
- B. To fully realise the benefits of the master plan’s implementation will require its vision, principles and various strategies to be communicated and understood widely. This can support the development of new products, tours, experiences and in turn support the local and regional economy.
- C. New format mapping, interpretation and wayfinding apps suited to smart phones, tablets and GPS enabled vehicle support software is likely to be the backbone of curating experiences and providing an integrated one-stop-shop for information, booking and interpretative services. The development of this service and its content requires early planning and progressive ongoing implementation.
- D. A shuttle service can be incrementally phased and piloted in different ways early in the project’s implementation ahead of wider strategic rollouts.



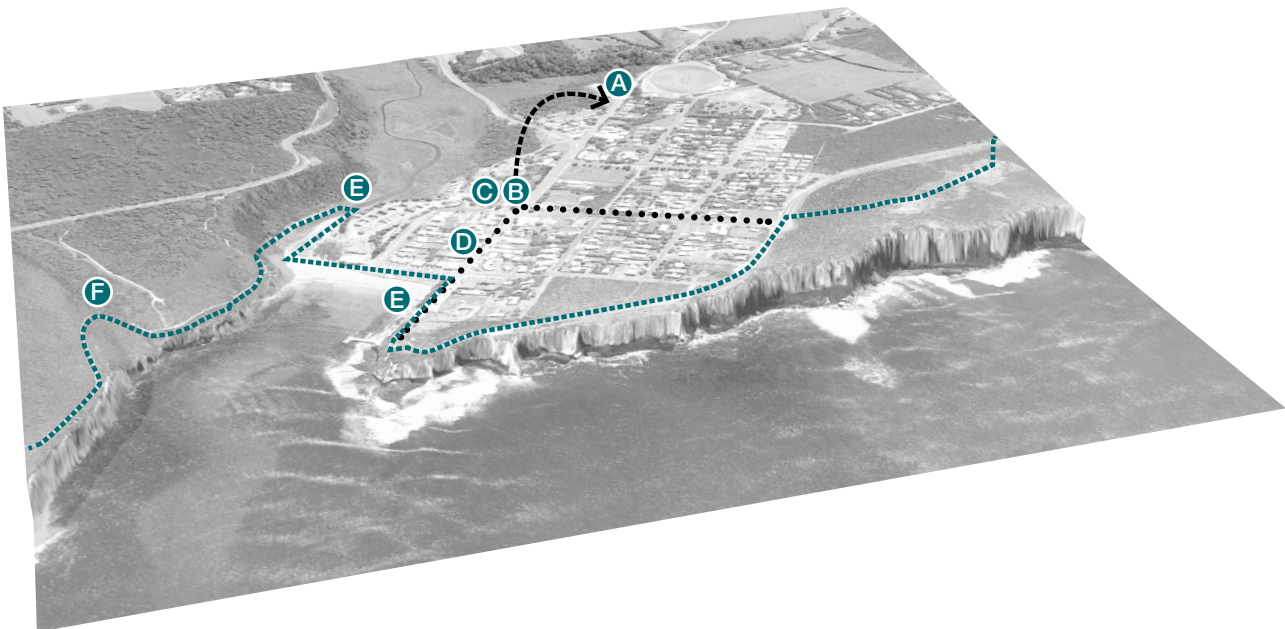
Project enabling initiatives illustrated above are proposed to be implemented across the master plan study area.

SCENARIO 2

Port Campbell

The Port Campbell projects below are considered complementary in nature when understood as a delivery sequence in a strategic context.

- A. Relocating Parks Victoria’s management and administration office from Lord Street to Parks Victoria’s depot. This is a more efficient arrangement for Parks Victoria’s operation and potentially reduces cost of office space.
- B. Parks Victoria’s office relocation opens up a key site on the intersection of Lord Street and the Great Ocean Road. This in turn enables the Port Campbell Visitors Information Centre to be relocated and upgraded as a Visitor Experience Centre (VEC) in a prominent location at the north end of Lord Street.
- C. With the Visitor Information Centre relocated, its existing site can be transformed into a Park and Ride Hub connected to the VEC. This facility can support the local shuttle services and a centrally located V-Line stop strategically placed at the north end of Lord Street for ease of wayfinding from the central part of town.
- D. With a centrally located Park and Ride Hub at Lord Street’s northern end this facility can support pedestrian movement along the street. This experience can be enhanced with streetscape upgrades to encourage visitors to linger longer in the street and potentially spend more in the town.
- E. To supplement the work in Lord Street’s north edge a complementary package of projects can be advanced at Lord Street’s southern end. This could include the town green and its links through to a new pedestrian bridge over Campbell’s Creek.
- F. A new pedestrian bridge, in turn, enables the 12 Apostles Trail (pedestrian users) to directly connect Port Campbell at the town green and achieve an integrated connection into the town’s local trail network.

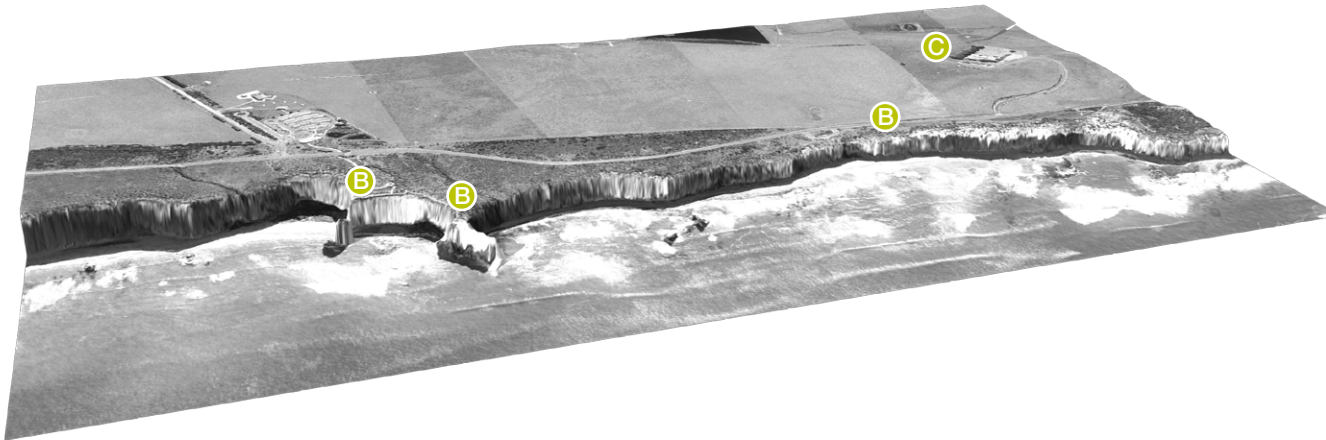


SCENARIO 3

Loch Ard + Twelve Apostles Glenample Precincts

The Loch Ard and Twelve Apostles Glenample precincts provide different implementation opportunities that include the delivery of individual high profile projects and packaging of strategic projects for delivery in the medium and longer terms.

- A. A discrete project that could be delivered immediately in the Loch Ard Precinct is the Blow Hole Lookout. This individual and relatively small project could set the tone for the quality and type of experiences to be delivered across the coast. Its early delivery would reopen a much loved visitor attraction and reconnect a missing link in the local trail network.
- B. A group of projects that could be implemented as a coordinated package include the Loch Ard Gorge Access Stairs, the Gibson Steps and the Twelve Apostles Amphitheatre and Lookout Beams. These projects are considered critical to achieving the world-class visitor experience at the coast’s prime attraction. Requiring detailed planning, design and engineering – they are likely to be implemented in the medium term.
- C. A key priority for the master plan’s implementation is the strategic repositioning of the access, circulation and navigation into and through the parks. The Glenample Visitors Experience Centre and the associated Park + Ride Hub and its link to the GOR shuttle service underpins this strategy. Delivery of these projects requires early planning at the start of the implementation process ahead of being fully resolved and delivered in the medium to longer term.



Governance

Implementing the master plan will require significant investment in project management. The implementation tasks include:

- Bidding for and securing implementation funds.
- For each of the identified projects – technical studies / concept development / consultation / evaluation and value management / consultation and communication / environmental and planning approvals / procurement / contract administration.
- Agency co-ordination including VicRoads, Parks Victoria other state departments and councils.
- Ongoing consultation and communication with the broader community on progress of the master plan and its implementation.
- Liaison with key stakeholders in the business and investment community.
- Investment attraction and facilitation via a ‘one-stop shop’ for information on investment opportunities, market information and approvals co-ordination.
- Marketing and promotion of the area as a world-class destination with a focus on growing international markets.
- Co-ordination of strategic and statutory planning requirements in conjunction with the councils.
- Co-ordination of supportive programs including Landcare.

To implement the master plan, a well-resourced and professional management team is essential. Relevant local councils, and State and Federal government departments should be represented alongside technical experts, planners and critical stakeholders including the Great Ocean Road Tourism Board, Catchment Management Authorities and Traditional Owners.

Funding and Charging Policy

Implementation of the project will require initial investment by the Commonwealth and State Governments. The Commonwealth could view implementation of the master plan as a ‘nation building’ project, and the State Government as a major economic and job creation initiative — ‘a new major project for regional Victoria’. It is highly supportive of the state’s objectives for regional development in Victoria.

The level of investment should be sufficient to implement a number of high-priority projects to signal to the private sector that opportunities for successful projects will be created. Importantly, the standard of facilities to be provided and the quality of the experience should leave all visitors with an impression of ‘value for money’.

During consultation it was identified that a significant proportion of visitors and local residents would be open to considering some form of parking or entry fee so long as the revenue was directed into park reinvestment and maintenance. This would require further investigation.

Enablers

The planning schemes for the Shires of Moyne and Corangamite may require review to implement the master plan, particularly with respect to those proposals associated with township interfaces. The objective is to facilitate investment in appropriate accommodation, hospitality and tourism support facilities while at the same time promoting the highest quality design and standards of environmental sustainability and conserve and protect the parks.

Detailed work will be required to facilitate the proposed transport networks, necessitating planning scheme amendments to accommodate new road alignments, trails, parking facilities and transport hubs where they are required. An important aspect of ensuring the master plan is implemented to a world-class standard is the need for ongoing design review and stewardship by a multidiscipline design review group.

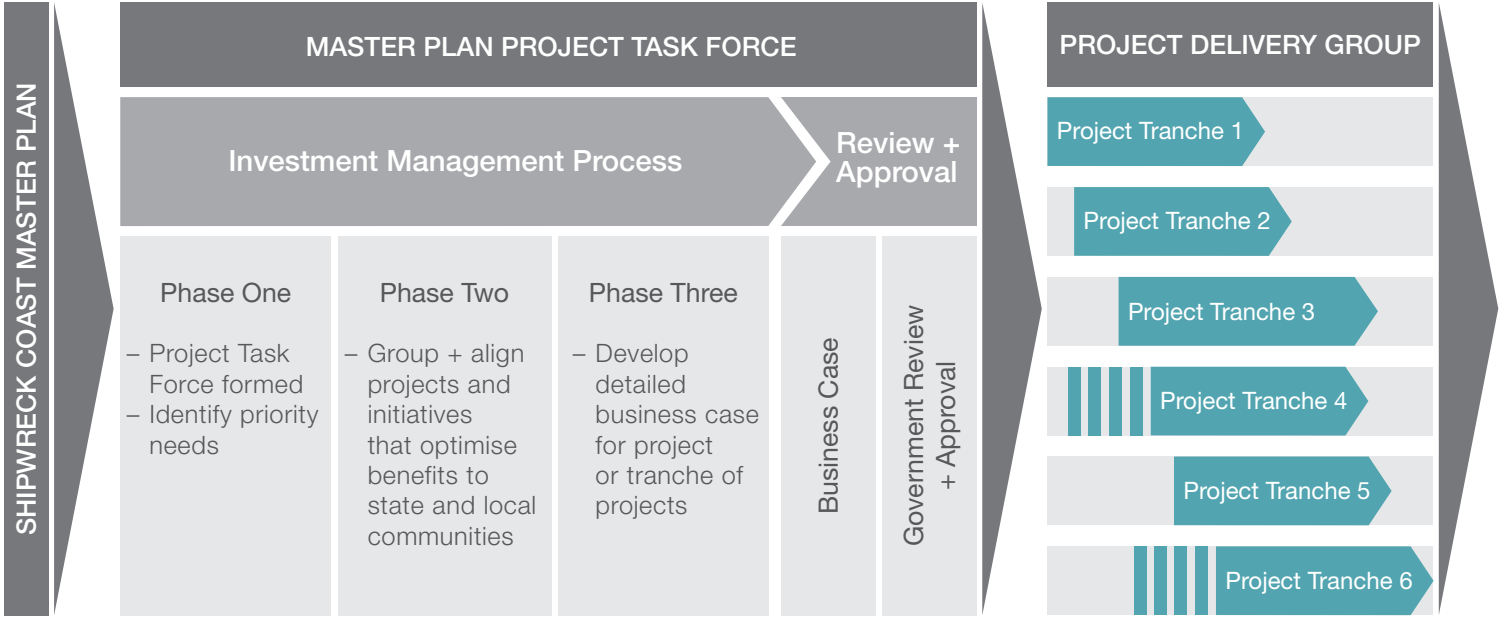
Regulations

A review of relevant regulations affected by the master plan proposal is required including implications for the Parks Victoria ‘Port Campbell National Park and Bay of Islands Coastal Park Management Plan’ (1998).

Marketing and Communication

This is a very important aspect of the governance arrangements. In order to realise the benefits that justify the proposed investments in the area’s tourism infrastructure, marketing must penetrate world markets and promote longer stays in the region. This will require working closely with sellers overseas and around Australia.

In parallel with this work will be the requirement to ensure the local community, including the business community, remains fully informed and supportive of the master plan initiatives and is involved in their rollout in a meaningful way. Tourism Victoria will play a major role in the marketing and promotion effort, including marketing opportunities to potential investors.



Implementation road map to be informed by Project Task Force + Project Delivery Group (Conceptual order only)

