

Tourism Mount Gambier Strategy

Changing the Tourism Culture



OUR VISION

Mount Gambier be recognised as a world renowned destination.

Delivering a top class visitor experience that ensures sustainable growth in the Tourism economy of Mount Gambier.

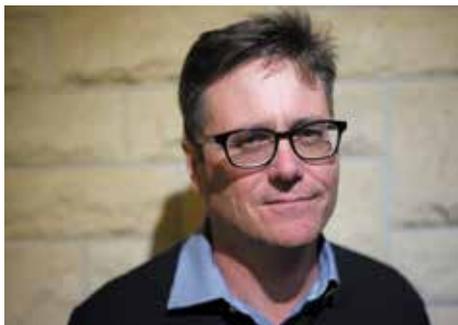
WELCOME & MISSION

I am proud to introduce the second iteration of Tourism Mount Gambier's (TMG) strategic plan, that succeeds the inaugural plan that was developed in 2014.

The first plan was the blue print for the activities of TMG and I am delighted to report that a number of the initiatives have been put in place and some have been refined. This plan includes new strategies to further enhance the visitor economy of Mount Gambier.

The document is about bringing about change, not just in promotion and product but changing the tourism culture in our region. Tourism is everyone's business and growth in the visitor economy will bring economic benefit to the entire community. The Tourism Mount Gambier strategic plan is a document that reaches beyond our members.

I would like to take this opportunity to thank the hard working board, who are a group of volunteers who have a shared vision and are working selflessly to achieve the ambitious outcomes set down in the strategic plan.



Kent Comley
Chair, Tourism Mount Gambier

OUR MISSION

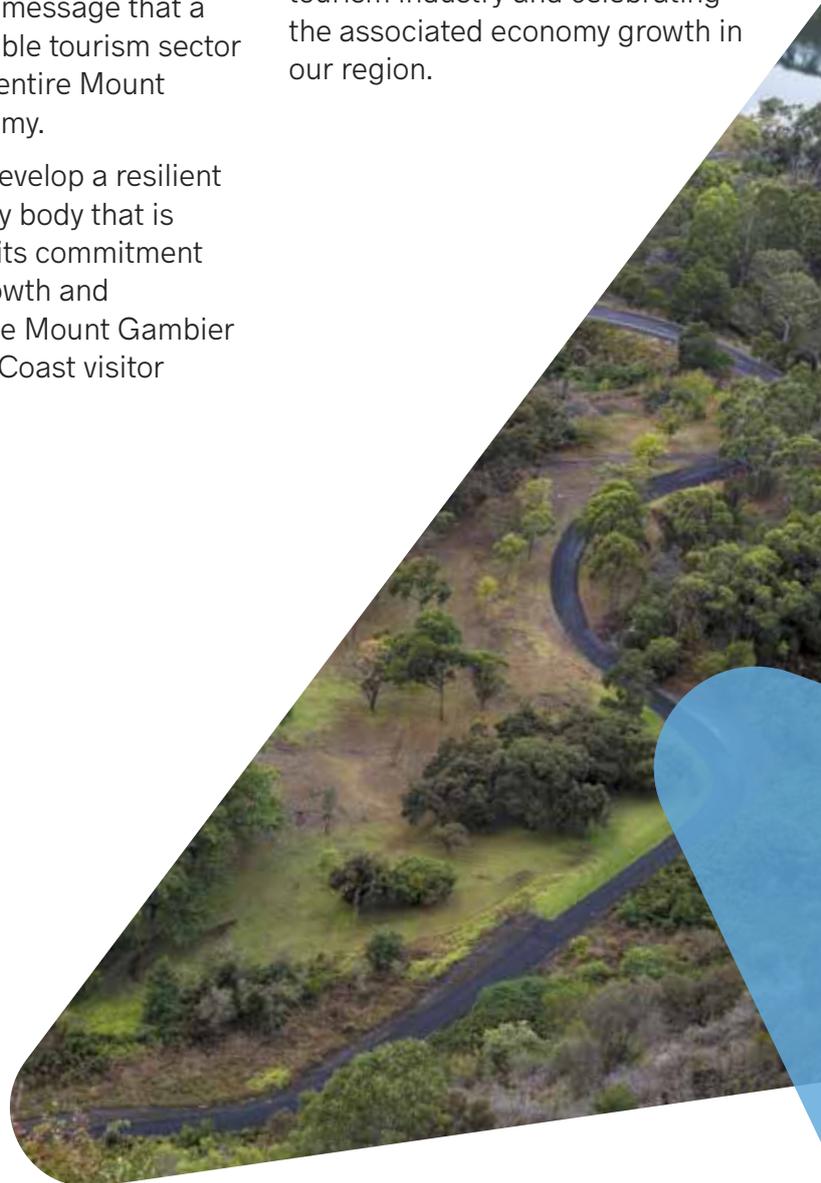
Tourism Mount Gambier has commenced its journey towards our mandate to "Change the Tourism Culture" and set a pathway towards achieving our goal of international recognition as a top tourism destination.

Tourism Mount Gambier is now actively engaging with the broader business community as we drive the message that a strong sustainable tourism sector is good for the entire Mount Gambier economy.

Our goal is to develop a resilient tourism industry body that is recognised for its commitment towards the growth and promotion of the Mount Gambier and Limestone Coast visitor economy.

This strategy has been revised to reflect these focus areas and align activity to the Limestone Coast Local Government Association (LCLGA) plan and the strategic direction of the South Australian Tourism Commission.

In Mount Gambier we are focused on building and improving visitor services. We are looking forward to the development of a thriving tourism industry and celebrating the associated economy growth in our region.



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VALUE OF TOURISM IN REGIONS

The value of regional tourism is being recognised by State and Local governments across Australia.

The South Australian government through the South Australian Tourism Commission is currently developing a strategy for Regional Tourism. Tourism Mount Gambier will be involved in the process and actively contribute to the development of this important strategy.

The region of Mount Gambier and the Limestone Coast has much to offer and we come from a strong base as we focus on strengthening and growing our visitor economy. Our location puts us at the heart of major touring routes and we boast a truly stunning natural environment with unlimited possibilities for visitor experiences.

The existing infrastructure includes an airport, over 1000 bed nights and a vibrant city heart.

There is much to be done to ensure Mount Gambier grows our share of the valuable tourism market. Visitors are already coming to Australia in record numbers, and our role is to attract them to our region. There is significant competition as regions across Australia seek to attract the attention of this market. To be successful requires a “whole of region” approach and everyone understanding that building a professional and sustainable industry will benefit generations to come.

VALUE OF TOURISM IN THE LIMESTONE COAST

Source: SATC Report

3-year annual average to December 2016

VISITOR EXPENDITURE
\$292 MILLION

POTENTIAL BY 2020
\$475 MILLION

OVERNIGHT VISITORS PER YEAR
550 THOUSAND

OVERNIGHT BY INTERNATIONAL VISITORS
8 PER CENT

OVERNIGHT BY INTERSTATE VISITORS
35 PER CENT

OVERNIGHT BY INTRASTATE VISITORS
57 PER CENT

VALUE OF VISITOR NIGHTS
\$1.77 MILLION

DIRECT EMPLOYMENT
1800

TOURISM BUSINESSES YEAR END JUNE 2015
867

Tourist Accommodation data is sourced from the ABS Survey of Tourist Accommodation and is for the year ended June 2016.

EXECUTIVE SUMMARY

Mount Gambier is South Australia's largest regional city and is the Capital of the Limestone Coast*. The region provides the visitor with a diverse tourism experience, set in a globally recognised natural environment

Tourism contributes strongly to the local economy, injecting an estimated \$59.4 million directly and \$12.0 million in flow-on impacts to the City of Mount Gambier's Gross Regional Product.*

The importance of the sector in driving economic growth for the City of Mount Gambier has clearly been identified by the City of Mount Gambier Council and supported by industry, both direct Tourism businesses and those who benefit indirectly from a strong visitor economy.

This strategy was originally produced in 2014 and this update reflects the progress that has been made and provides a pathway for the future development of this crucial sector. It reflects the commitment of both local government and the private sector to deliver key projects and promotional activity to drive visitor numbers.

Tourism Mount Gambier has set clear objectives and accompanying strategies to ensure that a strong and focused industry organisation represents the tourism industry of the City of Mount Gambier and surrounding areas as a professional and effective body.

The City of Mount Gambier has made a commitment to support the Tourism Mount Gambier strategy and its implementation with a budget of \$480k over three years, commencing financial year June 2016. Progress has been made in the following areas:

- **the appointment of a Manager Tourism and Economic Development;**
- **the commencement of the development of a comprehensive Tourism Portal and Digital strategy;**
- **targeted engagement with tourism stakeholder organisations in Local, State and Federal government and;**
- **the scoping of relevant programs to support tourism growth.**

In updating this Strategy, Tourism Mount Gambier has aligned activities in support of the findings of the four key strategic documents commissioned by the City of Mount Gambier:

- **Signage Strategy and Action**
- **Tourism & Visitor Information Services Review**
- **Tourism Data Collection**
- **City Of Mount Gambier City Growth Strategy**

The findings in these reports have directly impacted on the direction of the Tourism Mount Gambier plan, and we have reviewed and reshaped the Strategies and Actions to better address our core focus areas.

As a part of the review, Tourism Mount Gambier has aligned the activities to the Limestone Coast tourism strategy. We acknowledge the need to ensure greater effectiveness of our joint resources.

We are committed to ensuring that we are aligned to the delivery of relevant programs and industry support that will deliver sustainable growth of the visitor economy for the City of Mount Gambier.

*the Limestone Coast is a region made up of 7 local councils.

*2014/15 figures sourced from economic scoreboard.

OPPORTUNITIES & CHALLENGES

This industry plan has been developed to address both the opportunities presented in the area and the challenges that have been identified and reconfirmed in the recent studies undertaken by the City of Mount Gambier.

STRENGTHS

- Significant natural assets – geological, historical and cultural
- Location – midway between Melbourne and Adelaide, centre of Melbourne to Adelaide Touring Route
- Size – largest regional centre between Warrnambool and Adelaide
- Capital of the Limestone Coast, second largest city in South Australia
- Diverse and stable economy
- Progressive local councils

OPPORTUNITIES

- Growth of the self drive market
- Leverage James Morrison Academy of Music
- Leverage existing Great Ocean Road visitors
- New focus on regions by South Australian Tourism Commission

- Increasing international visitors into South Australia
- Utilise City of Mount Gambier relationships to grow the number of high-end Chinese visitors
- International student “visiting families and friends” markets from Melbourne and Adelaide

CHALLENGES

- Poor air access – expensive and inflexible. Regional airport needs urgent upgrade
- Ageing accommodation stocks
- Lack of commissionable product and trade awareness
- Average stay is short
- Lack of website presence by smaller tourism operators

THREATS

- Skills shortage
- Mining development
- Political climate

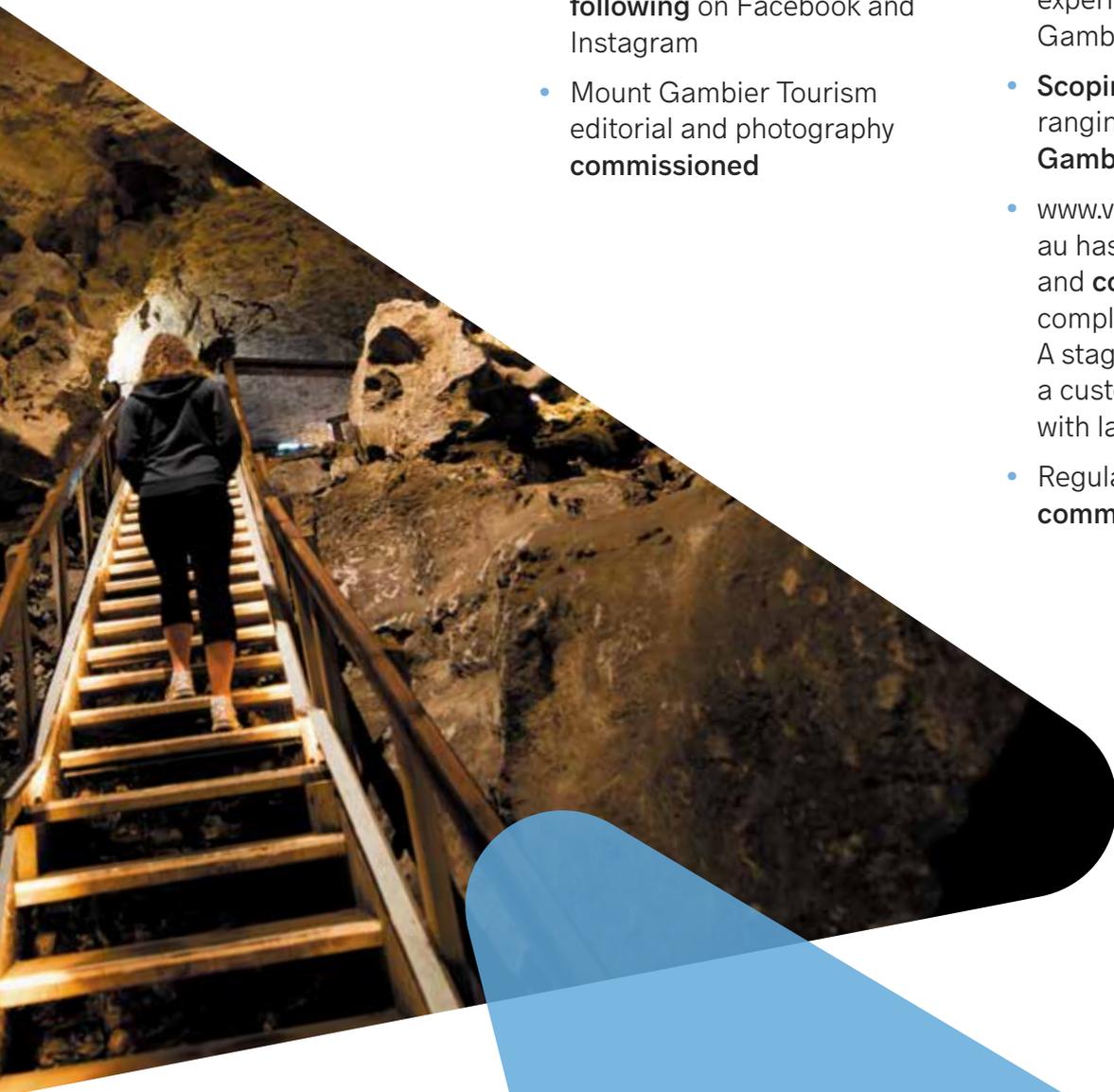


NATIONAL VISITOR SURVEY (NVS) SHOWS
DOMESTIC EXPENDITURE IN SA INCREASED
BY 9.1% TO \$5.3 BILLION
FOR THE YEAR ENDING MARCH 2017
AN INCREASE OF \$438 MILLION
SINCE MARCH 2016
AND WELL ABOVE THE NATIONAL
AVERAGE OF 5.7%.

ACHIEVEMENTS TO DATE

The initial industry Strategic Plan was produced in 2014 and endorsed by council in 2015. The Tourism Mount Gambier Board has reviewed the progress and below is a list of the actions and achievements made in the first year of the organisation.

- Tourism Mount Gambier **officially formed**
- **Funding commitment confirmed** from City of Mount Gambier
- **Appointment** of Manager Tourism & Economic Development
- **Social media presence established** and **growing following** on Facebook and Instagram
- Mount Gambier Tourism editorial and photography **commissioned**
- **New visitor experience** – Ghost Mushroom Lane – a collaboration with Forestry SA. This project will be developed for the 2017/18 season and **deliver opportunities** for a guided tour experience. It has also **opened engagement** between Tourism Mount Gambier and Forestry SA on further cooperative tourism experiences in the Mount Gambier Forests
- **Scoping** has begun of a wide-ranging **Guides of Mount Gambier concept**
- www.visitmountgambier.com.au has been **fully scoped** and **commissioned** for build completion in September 2017. A stage 2 build will integrate a customised journey planner with language options
- Regular email developed and **communicated to industry**



LEAD

Establish Tourism Mount Gambier as the peak Tourism industry body for the Mount Gambier area and become the lead advocate for Tourism related issues.

PROMOTE

Develop and execute a comprehensive branding and marketing communication strategy for Mount Gambier.

ENGAGE

Actively facilitate and encourage the development of new tourism products and services and the expansion and upgrade of existing offerings.

ATTRACT

Increase visitation to Mount Gambier that will deliver an increase in direct revenue by 9.1 % over 5 years.

LEAD & PROMOTE

Lead

Establish Tourism Mount Gambier as the peak Tourism industry body for the Mount Gambier area and become the lead advocate for Tourism related issues.

- Create a robust membership framework to drive growth of a **sustainable membership base**
- Establish **strong networks** in government
- **Represent** the region on red and green tape issues preventing the **development of natural assets** as tourism visitation site
- **Collaborate with government agencies**, including Tourism South Australia and Limestone Coast Local Government Association, Forestry SA
- Actively **represent and lobby** on behalf of the private sector in the re-development of the Mount Gambier Airport
- Facilitate industry training and upskilling opportunities

Promote

Develop and execute a comprehensive branding and marketing communication strategy for Mount Gambier.

- Create and manage a **state of the art web portal**, including an itinerary builder and a site domiciled in China
- Develop and grow an **effective social media presence**
- Identify and **promote** new tourism products and services
- Identify **effective marketing portals** and opportunities
- Actively target **high level sporting events** to the Mount Gambier region in association with City of Mount Gambier
- **Produce video presentations** for multiple promotional use, including social media, campaigns and industry use
- **Develop an advertising campaign proposal** for Mount Gambier and Limestone Coast, that will be funded by South Australia Tourism Commission and other relevant government departments

ENGAGE & ATTRACT

Engage

Actively facilitate and encourage the development of new tourism product and services and expansion and upgrade of existing offerings.

- Work with local operators to **develop and enhance** the range of visitor experiences
- **Engage regularly** with industry – communications (newsletters and updates), briefings and industry events
- **Publicise funding opportunities** available to local stakeholders
- **Showcase** the natural and indigenous history, cultural **assets and experiences** in the Mount Gambier area. This includes supporting the development of an interpretative centre for Indigenous Parietal Cave art and aboriginal history
- **Encourage participation** of tourism businesses, particularly those in food and wine, to participate in **regional marketing strategies**

Attract

Increase visitation to Mount Gambier that will deliver an increase in direct revenue by 12% over 5 years.

- **Supporting growth** of tourism products and services by the **expansion of existing product**
- Identify and **support the development of new opportunities** – including low impact activity in the Crater Lakes area
- Utilise the Great Ocean Road as a preferred travel destination **through increased cooperation** with Victorian operators
- Develop a **web-based itinerary**
- **Actively pursue** growth opportunities in **Event Tourism**. This includes major sporting events, additional locally hosted major events and supporting existing events such as *Generations in Jazz*
- International markets **development focus** on growing the **Chinese visitor market**



ACTION PLAN & PROJECTS

To achieve effective and sustainable growth in Tourism requires a group effort. As a volunteer organisation we are committed to working with all stakeholders to ensure positive outcomes for the region. We recognise the necessity to leverage resources and ensure we gain maximum return on investment for the City of Mount Gambier, the Tourism Industry and our community as a whole.

The results from four City of Mount Gambier commissioned reports and the engagement with the community of Mount Gambier has highlighted key areas for focus to grow and develop the visitor experience in Mount Gambier. Tourism Mount Gambier will both and/or participate in and support the following projects that will deliver on the key objectives identified in the initial Tourism Plan.

- Guides of Mount Gambier
- Talking Tourism Series
- Crater Lakes Project
- Tourism Business Incubator Program
- Touring Route Development
- Familiarisation Program

These lead projects will deliver on the objectives of the Tourism Industry Plan. Each area reaches across each objective and will be integrated into the activities undertaken.

We have identified areas that are core to Tourism Mount Gambier and have identified these lead projects as the vehicle for delivering quantifiable results for Mount Gambier in our key focus areas:

- growth in visitor numbers both national and international
- length of stay
- increasing spend
- Mount Gambier brand awareness

TARGET MARKETS

NATURE BASED TOURISM

- Mount Gambier and the Limestone Coast has an extraordinary opportunity to grow the “nature based” tourism in the region. This aligns to the South Australia Tourism Commission’s strategy and action plan to transform the state’s nature-based tourism sector.

DRIVE MARKET - The natural market for growth comes from the drive market. This is no longer limited to domestic travellers, but now includes an emerging trend for international guest to travel independently beyond the major cities. Melbourne as a domestic market has a population of 4 million, Mount Gambier has a lot to gain by engaging this visitor sector.

INTERNATIONAL STUDENTS VISITING FRIEND AND RELATIVES (VFR)

- the universities of Adelaide and Melbourne offer enormous opportunity for Mount Gambier. Many students and their families have seen the cities and are looking for new experiences and are prepared to travel further.



South Australia's vision and actions is to make South Australia a world leader in "nature-based" tourism, while supporting the ongoing conservation of our State's natural and cultural heritage.

The strategy and plan also outlines the State Government's commitment to work with tourism stakeholders and to encourage investment into the industry. The strategy and action plan aims to inject \$350 million a year into the state economy and create 1,000 new jobs by 2020.

This is aligned to the State Government's economic priority 5, which aims to make South Australia a growing destination of choice for international and domestic travellers.

Source: www.tourism.sa.gov.au/research-and-statistics/strategies/nature-based-tourism July 2017

The Deloitte Access Economics Report prepared for the Australian Government titled "The Value of International Education to Australia", 2015 states;

"The economic contribution from the \$282 million in export revenue attributable to VFR who come to Australia for the purpose of visiting an international student. Overall, these visitors were estimated to directly contribute \$123 million in value added to the Australian economy".

TOURISM MOUNT GAMBIER - LEAD PROJECTS

The focus of Tourism Mount Gambier's activities is on strengthening the industry and driving the brand awareness of Mount Gambier as a premier visitor experience. This will be achieved in partnership with industry to Local, State and Federal governments.

We will cultivate relationships with media and the decision makers in the tourism trade to ensure Mount Gambier is a known, vibrant destination far and wide.

Tourism Mount Gambier will lead projects that develop and grow tourism products and services across the region. These projects and programs will all involve collaboration and engagement with the Tourism Industry and other key stakeholders such as City of Mount Gambier, Limestone Coast LGA and South Australian Tourism Commission.

DIGITAL STRATEGY, MEDIA AND COMMUNICATIONS

A comprehensive website is just the beginning of the digital story for the region. The site will be the go-to point for information on the region and ways to engage and enjoy the Mount Gambier experience. **The site will include:**

- Blog and news feeds
- Journey Planner
- Strategic Online Partnerships - Australian Tourism Data Warehouse (ATDW)

Telling the story of Mount Gambier is at the heart of attracting visitors. Media is a changing and dynamic area, presenting both traditional and emerging ways of sharing messaging and influencing buying decisions. Tourism Mount Gambier has designed a communications strategy that recognises the need for flexibility and act on opportunities that arise.

The Plan will include:

- A program of promotion through social media has been successful in our first year. This will be increased and become more targeted in 2017/18
- Participation in Tourism South Australia promotional programs (in association with LCLGA) will leverage the marketing spend and ensure Mount Gambier is included in the states campaigns
- Regular Mount Gambier Tourism media releases to the travel industry, nationally and internationally
- Targeted hosted familiarisation (visit) programs into Mount Gambier
- Identification of cost effective traditional media opportunities

GUIDES OF MOUNT GAMBIER

This is a significant program that is being scoped as a lead project for the region. "Guides of Mount Gambier" has the opportunity to involve a wide range of interest areas, from geological, historical and cultural experiences. This program has the opportunity to set Mount Gambier apart from other destinations. We have unique experiences and stories to tell in Mount Gambier and the "Guides of Mount Gambier" program provides a way for us to enhance the visitor experience.

The initial stage will be a pilot scheme, with 6 - 10 various "Guides of Mount Gambier" experiences.

The program will:

- Create a structured framework that will deliver a range of guide experience offerings to visitors
- Provide business opportunities from walking tours to tour buses across a range of interest areas
- Ensure a consistent and high standard of service deliver

The project will include multiple stakeholders and City of Mount Gambier as a partner.

TALKING TOURISM SERIES

Tourism Mount Gambier will ensure that our members stay informed and connected.

The “Talking Tourism Series” will be a program of ongoing industry engagement events including updates, guest speakers, workshops and a Tourism Awards program. The regular e-newsletter will be published under the same brand.

CRATER LAKES PROJECT

Active identification of areas for improvement and aligning to the City of Mount Gambier’s Community Plan will see various projects form with the aim of improving the visitor experience in this key area of Mount Gambier. Tourism Mount Gambier will work with all stakeholders in refreshing this key visitor experience.

TOURISM BUSINESS INCUBATOR PROGRAM

Tourism Mount Gambier will develop a program that will engage with entrepreneurs, individuals and businesses that have new product and service ideas for the visitor market. The program will provide pathways to information and access to relevant organisations and potential funding sources. It will include mentoring and support to members as their industry body. The program will positively leverage relationships with allies in government and the private sector for the benefit of new tourism businesses or to establish new product and services in the Mount Gambier area.

TOURING ROUTE DEVELOPMENT

Tourism Mount Gambier will build relationships and partnerships with tourism regions along the Melbourne to Adelaide Touring Route to encourage travelers to explore beyond the Great Ocean Road. Relationships and partnerships with Glenelg and Southern Grampians will also be cultivated.

FAMILIARISATION PROGRAM

Development and delivery of Familiarisation Programs (Inward Visits) for industry decision makers and influencers. These include Media, Inbound Tourism Operators and Agents.



PARTICIPATION PROJECTS WITH KEY PARTNERS

Tourism Mount Gambier's key partners are City of Mount Gambier and the Limestone Coast Local Government Association (LCLGA). To really drive the growth of visitor numbers to the region, working together is essential. It is also imperative that we leverage our resources and have the same narrative and goals, as we reach out to new and existing markets.

We are proudly united in our mission to grow the visitor market and industry capability in the Limestone Coast region. This will be achieved as we actively deliver initiatives and projects through cooperation and collaboration.

Our activities and projects have many touch points with the overarching South Australia Tourism Strategy and developing SA Regions Strategy. This ensures our programs align and embrace those of the South Australian Tourism Commission.

CITY OF MOUNT GAMBIER

The level of commitment by the City of Mount Gambier to the growth of the visitor economy is clearly demonstrated through the funding of Tourism Mount Gambier. The recently commissioned reports into the visitor market and the implementation of the Signage Strategy and Visitor Information Review all reflect this.

SIGNAGE

The Signage and Action Plan commissioned by City of Mount Gambier points to major deficiencies, from large entrance signs to wayfinding in the Crater Lakes area.

The implementation plan is under development and while the program will be lead by City of Mount Gambier.

TMG participation: Tourism Mount Gambier will actively contribute to the roll out.

EVENTS ATTRACTION

The City of Mount Gambier is recognised as a great place to hold events such as sports, music, and art or motor shows. The City of Mount Gambier's event team currently supports over 90 events each year. An Events Attraction Strategy has been developed with the purpose of attracting more high value events that encourage longer stays.

TMG participation: We will work with City of Mount Gambier to develop packages that encourage longer stays and will increase the visitor spend for the region.

VISITOR CONNECTIVITY

WiFi hotspots will be created and in action for our visitors to enjoy for summer 2017/18. Visitors will be able to tell the world about their great adventures in Mount Gambier, and shoot off photos instantly to friends and family. The best publicity we can get!

TMG participation: Promotion of the service and future development of interactive products.

REALIGNMENT OF VISITOR INFORMATION SERVICES

The City of Mount Gambier commissioned Review of Tourism and Information Services recommends significant changes in the delivery of Visitor Information Services in Mount Gambier, including the centralisation of services and development of a mobile Visitor Information Unit. An implementation plan is to be developed.

TMG participation: The review has been welcomed by TMG and is considered a positive direction for the city. TMG actively supports these changes.

LIMESTONE COAST LGA (TOURISM STRATEGY)

TRADE SHOWS AND INTERNATIONAL EVENTS

Four key trade shows will be attended by LCLGA in the coming financial year. With two international shows in the emerging markets of India and China and the key national industry events, Australian Tourism Exchange (ATE) and Corroboree West.

TMG participation: To provide support collateral and participate in Australian Tourism Exchange and other events as appropriate.

Note: Tourism Mount Gambier will also support the City of Mount Gambier lead mission to China.

INBOUND TOURISM OPERATORS (ITO) ENGAGEMENT

LCLGA will continue building on its existing relationship with ITOs directly and through their activity and links with South Australia Tourism and Tourism Australia.

TMG participation: ITO engagement links directly into the familiarisation programs and trade shows. We will continue to work collaboratively to encourage Mount Gambier and the Limestone Coast to be front of mind for industry decision makers.

CO-ORDINATION OF PRODUCT BUNDLING (PACKAGING)

To be effective in the engagement of the travel industry, our region needs to offer packages. Considerable work is being done in this area for both the domestic and international markets.

TMG participation: Active support of LCLGA and assisting coordination with industry for specific opportunities and market specific product bundling.

INTERNATIONAL STUDENT VISITING FRIENDS AND RELATIVES (VFR) ATTRACTION

This is a market readily available for growth in the Limestone Coast region. The VFR market of students studying in Australia is growing. Students studying in the state capitals are looking for new destinations for their visitors and the regions are now starting to benefit from this new focus.

TMG participation: Active support through marketing and the development of famils for student councils and influencers.

SCOPING AND DEVELOPMENT OF THE MEETINGS, INCENTIVES, CONFERENCES & EVENTS (MICE)

The MICE industry promises growth for the region in a valuable sector.

TMG participation: Providing input to the strategy and driving the associated promotion of Mount Gambier and Limestone Coast to this market.

Over 37 million people attended business events across Australia in 2013-14. Those business events directly generated \$28 billion direct expenditure; \$13.5 billion in direct value added; 179,357 direct jobs.

Source: EY report
The Value of Business Events
to Australia.

CONTACT DETAILS & MEMBERSHIP INFORMATION

Become a member of Tourism Mount Gambier

Get involved and become a member of a dynamic and future looking organisation. We are passionate about Mount Gambier and the opportunities a strong united tourism industry can bring to our region. As a Tourism Mount Gambier member you will contribute to the growth of an effective, long term industry leader, driving the growth of the visitor economy.

Together we can make Mount Gambier a recognised global destination!

For more information:
www.discovermountgambier.com.au

Or email:
tourism@mountgambierchamber.com.au

What does membership provide to you?

- Be part of a tourism network and allied business operators working together to grow the visitor economy
- Keep updated with our regular newsletters and industry information
- Opportunities for members to be promoted to national, international tourism bodies with request for on-site visitations, tourism networking events
- Stay informed with information about government funding and strategic initiatives
- Participate in industry events and workshops
- Benefit from representation and collaboration with all levels of government to the benefit of all in the sector

ACKNOWLEDGEMENTS

Tourism is a team effort, it is everyones business. Tourism Mount Gambier would like to acknowledge and thank the ongoing support and work of all those in the tourism industry:

- Mount Gambier Chamber of Commerce
- City of Mount Gambier
- Limestone Coast Local Government Association
- South Australian Tourism Commission



*Tourism
Mount Gambier*



City of
Mount Gambier



**MOUNT
GAMBIER
CHAMBER OF
COMMERCE**

Version: August 2017.