



**AGENDA APPENDIX**  
**Council Meeting**  
**Wednesday 24 August 2016**

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**E.14 SOUTH GIPPSLAND BRANDING REVIEW REPORT**

Appendix 1 – South Gippsland Shire Council Brand Review – Research  
and Recommendations (Copy Transmission) Report

# South Gippsland Shire Council

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## Brand Review

## Research & Recommendations

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Public Report

9 August 2016

Copy Transmission



Authorised by Brett Hamm & David J Ling, PhD







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# South Gippsland Brand Review

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## EXECUTIVE SUMMARY

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This report provides an analysis of research into South Gippsland's current branding and marketing framework. It culminates with 33 recommendations.

The region's existing official *Prom Country* brand is assessed, evaluating its effectiveness and suitability. Other existing representations of South Gippsland and its sub-regional brands are also inspected as are the connections between them.

As an evidence-based report, the content and conclusions herein are wholly based on exhaustive research, both qualitative and quantitative. The methods, findings and outcomes are well described in the report and documented in detail in the reference list.

The recommendations aim to improve integration with the branding framework to more efficiently and effectively attract new residents, visitors and investments to the region.





## Destination branding network

The destination branding network, as it relates to South Gippsland, is shown to have four important levels: state, regional, local and grass-roots. Pivotal agencies at the core of each level are Visit Victoria, Destination Gippsland, Prom Country Regional Tourism and a handful of sub-regional community-led groups.

It is shown that the network relies upon structured information flows, moving both directions through the network—only in this way can strategies and implementations achieve optimal outcomes with the resources at hand.

## Trends & challenges for destination branding

While there are a number of national and state-wide issues that need to be monitored, South Gippsland is most acutely prone to some rather unique situations found at the regional and local levels. Specifically, it has been found that the relevant Regional Tourism Board (Destination Gippsland Ltd) and Local Tourism Association (Prom Country Regional Tourism) have sub-optimal patterns of communication and co-operation. Clear opportunities for improved integration exist, including better-defined agency roles and accountabilities, and measures to address inter-agency competition for South Gippsland funds.

## South Gippsland's brand virtues

To achieve and maintain a clearly recognisable identity over time, all brands must ensure that certain core values are well expressed.

Making use of extensive research, Copy Transmission unveils eight brand virtues that are core to the South Gippsland identity and pivotal to its success. These on-brand criteria can themselves be divided into three categories: *inherent*, *abstract* and *monetisable*.

Category	#	Virtue
Inherent	1	Natural beauty *Flagship Virtue
	2	Accessibility
Abstract	3	Welcoming
	4	Relaxing
Monetisable	5	Food & Fresh Produce
	6	Good Value Accommodation
	7	Quaint villages
	8	Outdoor activities

## Brand audit

Copy Transmission's audit of the South Gippsland brand identifies 5 names of high significance:

- 1 Gippsland
- 2 Southern Gippsland
- 3 South Gippsland
- 4 Prom Country
- 5 Wilsons Prom.

While most are shown to carry cachet and add value, it is recommended that *Southern Gippsland* be dropped from future use.

In terms of visual identity, the research supports the ongoing use of the PCRT logo for external promotions, with the SGSC logo to be restricted to intra-shire and governmental communications only.

Analysis of current social media presences and practices find that Prom Country has a genuine opportunity to leverage Destination Gippsland's extensive reach.

Of South Gippsland's significant sub-regional brands, it is shown that there are benefits to be gained from better integration within the destination branding framework. This may be achieved by way of well-defined positioning of sub-regional brands under the *Prom Country* umbrella, sharing knowledge and resources, direct industry liaison and constituent engagement.

## Competitors

Copy Transmission research identifies some destination competitors wherein their regional tourism boards are using different proactive strategies to manage the promotion of their regions. While not necessarily directly transferable, the successes of those regions can certainly be used to inform emerging strategies for the South Gippsland brand and Gippsland more generally.

While traditional competitor analysis is undertaken, perhaps the most striking finding in terms of competition is rather non-traditional. Destination Gippsland and Prom Country Regional Tourism find themselves effectively competing for funding and participation from local-industry: this is a major issue that requires action to resolve.

## Business target markets

Findings show that target businesses for South Gippsland are likely to be intrinsically connected to Melbourne and attracted by South Gippsland's accessibility thereto.

Primary and secondary agricultural businesses were identified as the most important to South Gippsland's future and should be targeted as a priority.

It was also found that tourism promotions may be leveraged to attract and support business in South Gippsland. Indeed, the tourism industry itself should be nurtured within the Shire as it produces positive outcomes beyond its direct effects.

## New residents target markets

Research reveals key factors likely to attract potential new residents for South Gippsland. They include the region's natural beauty, affordable housing, family friendly communities and schools.

## Visitor target markets

The average member of South Gippsland's visitor market is:

- aged between 45 and 64
- from Melbourne's south east side
- travels with partner and/or family
- takes influence from tourism brochures
- uses Visit Victoria as a resource
- uses Facebook in their everyday life
- uses TripAdvisor for travels
- has visited South Gippsland more than once
- has used visitpromcountry.com.au when visiting South Gippsland.

Among the visitor market, South Gippsland is perceived as natural, relaxing, rural and welcoming. Reputed for rolling hills, dairy farms, quaint towns and historical significance, it is regarded as a place for enjoying scenic drives, beaches and the natural beauty of Wilson's Prom along with food, wine and fresh produce.

South Gippsland's visitor market is mainly attracted by *natural beauty* and *good value accommodation*.

## Marketing activity audit

Copy Transmission evaluations of past and current marketing materials found that—regardless of the source and year—the flagship virtue of natural beauty was generally well represented.

Abstract and monetisable virtues were expressed less consistently.

Overall, this identifies an opportunity for improved promotional outcomes by way of a tighter strategic focus and greater consistency of expression.

## Current brand :: SWOT

The current South Gippsland brand was assessed for strengths, weaknesses, opportunities and threats. Significant findings are summarised in the following table.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Projection of flagship virtue, <i>natural beauty</i>, is consistently effective</li> <li>• Projection of the <i>outdoor activities</i> virtue is consistently effective</li> <li>• Style of imagery is consistent and expressive of brand virtues</li> </ul>	<ul style="list-style-type: none"> <li>• Ineffective projection of 3 out of 4 monetisable virtues</li> <li>• Low rates of buy-in for Australian Tourism Data Warehouse listings</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Boost calls to action by more prominently and consistently projecting the favourable proximity to Melbourne</li> <li>• Improve brand cohesion via consistent expression of abstract virtues</li> <li>• Raise brand awareness by more prominently featuring the <i>Prom Country</i> logo</li> <li>• Improve user experience with refinements to the <i>Prom Country</i> app.</li> </ul>	<ul style="list-style-type: none"> <li>• Alienation from the destination branding network</li> <li>• Brand fragmentation from errant representations</li> <li>• Reputation risk from potential brand-jackers</li> </ul>

## Recommendations

Based on the qualitative and quantitative research outlined above, Copy Transmission makes the following thirty-three (33) recommendations to achieve a well-integrated place-based branding framework for South Gippsland:

### **Brand Asset Recommendations**

- 01 Maintain the *Prom Country* brand name
- 02 Protect the *Prom Country* brand name
- 03 Maintain the *South Gippsland* brand name
- 04 Clearly delineate where and when *Prom Country* and *South Gippsland* are appropriate.
- 05 Use the South Gippsland Shire Council logo for internal audiences only
- 06 Establish an alternative to the *Southern Gippsland* brand name
- 07 Simplify and protect the Prom Country Regional Tourism brand name
- 08 Maintain the Prom Country Regional Tourism logo
- 09 Reconsider the Prom Country Regional Tourism tagline
- 10 Update or establish brand guidelines

### **Promotional Recommendations**

- 11 Adopt and emphasise the brand's 8 key virtues
- 12 Leverage state campaigns to promote daytrips and short getaways
- 13 Target repeat visitors
- 14 Use precisely targeted online campaigns to increase visitation from internationals

### **Online recommendations**

- 15 Refine the Prom Country app
- 16 Establish a social media strategy
- 17 Focus on Facebook
- 18 Integrate Instagram into Facebook efforts
- 19 Encourage TripAdvisor for businesses
- 20 Invigilate against social media brand-jacking
- 21 Commercially sensitive

### **Organisational Recommendations**

- 22 Fund PCRT with the full allocated budget
- 23 PCRT to expand multi-tiered membership
- 24 Develop an MOU between PCRT and Destination Gippsland
- 25 Develop an MOU between South Gippsland Shire Council (or the GLGN) and Destination Gippsland
- 26 Foster closer ties within neighbouring shires
- 27 Undertake a local product gap analysis
- 28 Actively support a flagship lodge development adjacent to Wilsons Prom

### **Grass-roots engagement recommendations**

- 29 Support local business engagement with an information campaign
- 30 Provide workshops to empower community-led groups to develop their own sub-regional destination brands
- 31 Engage community-led groups to strategically participate in the destination branding framework
- 32 Co-ordinate sub-regional brands under the Prom Country master brand
- 33 Allocate visitpromcountry.com.au sub-domains to community-led groups





# South Gippsland Brand Review

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## INTRODUCTION

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## Scope

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At the request of South Gippsland Shire Council, Copy Transmission has taken a good look at the South Gippsland brand and asked: *What works? What doesn't? Who are South Gippsland's target markets? How do we reach them? How do the pieces fit together?*

This report answers the questions above, providing clear recommendations for the development of an integrated branding framework to attract visitors, residents and investment.

It is the evidence-based culmination of three months of research and consultation, summarising project inquiries and giving a detailed account of pertinent findings in nine chapters:

- 1 Destination branding network
- 2 Trends & challenges for destination branding
- 3 South Gippsland's brand virtues
- 4 Brand audit
- 5 Competitors
- 6 Target markets
- 7 Marketing activity audit
- 8 Current brand—SWOT
- 9 Recommendations

Obviously, these chapters are not chronological accounts of the research undertaken. Instead, they report on focussed subjects so explain discoveries and analyses that led to the recommendations, detailed in Chapter 9.

The evidential basis of this report is fully explained and pertinent research and findings are elaborated.

But first, a short note on the definitions of *brand* and *branding* as they are relevant to this project...

## Brand Defined

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The word *brand* is sometimes used as shorthand for surface-level representations, limited in scope to brand names, logos and slogans. While those superficial aspects are important, good branding is much more—particularly in terms of foundations and strategy.

Strong brand foundations arise out of an authentic set of values and objectives that give them inherent meaning—its reason for being. When a brand is properly executed and maintained, its foundations are manifest within all representations—including brand names, logos and slogans, but also extending into PR, social media, advertising and communication.

Basically, South Gippsland's branding is the method by which it manages how it is perceived. Its brand is its identity, as it is understood by those who perceive it. It is the way that people think and feel about the shire, its landscape, its features and its inhabitants.

Consistent and effective transmission of the foundational values give the brand strength and allow positive perception to coalesce. That's why this project doesn't really dwell on logos or slogans—although those things are talked about in the proper context. Nor does this project seek to create a *new* brand—though the effectiveness of current branding is evaluated and new ways of achieving success are explored.

Put simply, this project assesses how all of the existing representatives and representations of South Gippsland fit together. We then see if there are ways they might fit together better. It's easier said than done—there are a lot of stakeholders with many differing priorities. Such a project's authority requires that the conclusions it reaches are evidence-based. That's why the project put significant resources into research methods that combine grass-roots and expert insights with objective data-driven analysis.

Ultimately, it concludes with a series of evidence-based recommendations aimed at better management of the big picture going forward.

## Research Methods

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This project arrives at its recommendations on the basis of five distinct methods:

- 1 Stakeholder consultation
- 2 Surveys of visitors and potential visitors
- 3 Collation and review of existing literature and third-party data sources
- 4 Mapping and analysis of existing destination branding structures
- 5 Audit of the current South Gippsland brand.

### Stakeholder consultation

Even before project initiation, Council recognised that the shire's destination branding activities affect a complex web of stakeholders—both internal and external, upstream and down.

Throughout the project, stakeholder engagement and direct consultation has allowed for expert and grass-roots wisdom to be centrally documented where it can be accessed and integrated by decision makers.

The stakeholders consulted for this report comprise:

- Tourism and business communities in South Gippsland
- Residents of South Gippsland
- South Gippsland Shire Council personnel
- Destination branding bodies
- Tourism and economic development officers from aligned councils.<sup>1</sup>

### Local tourism and business communities

Copy Transmission facilitated two public information sessions to explain and answer questions about the project's aims and methods and to give community members an opportunity to contribute their insights and experiences to the help shape project.

The sessions targeted local tourism operators, the business community and local trade associations and were open to the general public. The first was held in Foster at the Foster War Memorial Arts Centre on Tuesday 17 May 2016 from 5:30pm. The second was held in Leongatha at the South Gippsland Shire Council chambers on Thursday 19 May 2016 from 5:30pm.

All members of the local business and tourism community were encouraged to document their perspectives on the South Gippsland brand and to articulate their vision for its future, in two ways: via written submission and via a purpose-built online questionnaire. Submissions and questionnaires were both administered by Copy Transmission via a dedicated online portal: [www.southgippsland.copytransmission.com](http://www.southgippsland.copytransmission.com).

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<sup>1</sup> To ensure uninhibited consultation and the reliability of findings, full records of interviews have been sealed following stringent verification by South Gippsland Shire Council.

The sessions, the surveys and the invitations for written submissions were well publicised by South Gippsland Shire Council and followed up with phone calls by Copy Transmission personnel.

## Residents

All residents and property owners in South Gippsland were invited to participate in the survey. To maximise engagement across the shire, and to give interested parties plenty of opportunity to have their say, invitations were publicised via multiple channels, including:

- advertisements
- social media
- electronic mail campaigns
- community notice boards.

Copy Transmission developed the survey to gather insights, opinions and non-sensitive personal information from current South Gippsland residents.

Results were analysed to reveal general trends as well as significant differences between distinct population cohorts, such as new residents versus long-time residents.

## Destination branding bodies

Between April and June 2016, Copy Transmission conducted interviews and consultation sessions with representatives of a number of bodies that are connected to the destination branding network:

- Prom Country Regional Tourism
- Destination Gippsland
- Grampians Tourism
- Great Ocean Road Regional Tourism
- Visit Victoria
- Parks Victoria.<sup>2</sup>

These sessions provided practical insight into the operations of destination branding bodies and contextualised the South Gippsland experience within the wider Victorian destination branding landscape. Consultation allowed for the identification of current and potential issues and opportunities for South Gippsland and for the broader destination branding network. The sessions also revealed potential alternatives to methods, structures and strategies currently used to support the South Gippsland brand.

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<sup>2</sup> Victoria Tourism Industry Council (VTIC) and Cultural Tourism Victoria were also invited to participate, but declined involvement.

## **South Gippsland Shire Personnel**

Copy Transmission conducted a face-to-face briefing and consultation session with South Gippsland Shire Councillors on Wednesday 20 April 2016.

Councillors were also asked to complete a purpose-built online questionnaire prepared and managed by Copy Transmission.

Shire Councillor Liaison Officers provided follow-up encouragement for Shire Councillors to participate by submitting their perspectives.

Copy Transmission also conducted consultation sessions with key South Gippsland Shire Council personnel, ranging from the executive to the officer level.

## **Gippsland tourism and economic development officers**

Tourism and economic development officers from South Gippsland Shire Council and the five other Gippsland Local Government Network councils were asked to complete a purpose-built online questionnaire, prepared and managed by Copy Transmission.

## **Survey visitors and potential visitors**

Visitors and potential visitors to South Gippsland were surveyed using an incentivised online questionnaire.

In return for completing the survey, respondents were entered into a draw to win an overnight stay for two at Bellview Hill Bed & Breakfast.

The survey was disseminated with the assistance of South Gippsland Shire Council, Prom Country Regional Tourism, and via the social media channels of Copy Transmission and sister agency, Tanager.

PCRT included the survey and promotion in both their Autumn and Winter consumer newsletters.

Copy Transmission and Tanager publicised the survey and promotion via their respective Facebook pages.

South Gippsland Shire Council hosted hard copies of the survey at Visitor Information Centres across the shire.



## Review existing data and literature

In the interest of objectivity and evidence-based conclusions, Copy Transmission has undertaken an expert review of relevant literature and third-party statistical data to serve as a backbone for this report.

Copy Transmission was greatly assisted in this regard by the cooperation of local and state government bodies, as well as regional tourism boards.

Academic research along with reports from industry and governments were compiled and analysed. Data evaluation was performed within the context of the project objectives. Copy Transmission secured a firm foundation for the data-driven analysis contained within.

A full list of references is included at the end of the report.

## Review existing tourism structures

Copy Transmission has undertaken an independent review of the existing local and state tourism structures and arrangements. This has included the identification and description of all relevant tourism bodies, their brands and how they work together.

In undertaking this review, we sought not only to examine the structure as it is *supposed to* function, but to understand how it *really* functions on a practical day-to-day level.

Towards this end, Copy Transmission has undertaken extensive consultation with key stakeholders in addition to completing a thorough literature review.

The bodies and brands reviewed include:

- Prom Country Regional Tourism
- Business and tourism associations and brands in:
  - Leongatha
  - Korumburra
  - Fish Creek
  - Foster
  - Mirboo North
  - Loch Village
  - Meeniyan
  - Tarwin Valley
- Destination Gippsland
- Tourism Victoria
- Visit Victoria
- Cultural Tourism Victoria
- Victoria Tourism Industry Council
- Comparable tourism bodies and brands elsewhere in regional Victoria.

## Brand Audit

The current South Gippsland brand has been subject to a thorough audit, as have a collection of key marketing materials intended to represent the region. This audit investigated the brand's effectiveness, using three benchmark techniques:

- 1 brand alignment
- 2 consistency and cohesiveness of past and current marketing activities
- 3 comparison to relevant competitors.

Making use of the findings of the tourism data and state tourism structure reviews, this report provides a thorough analysis of South Gippsland's place within the wider tourism context, with a special emphasis on key trends and challenges that must be addressed.

Existing brands that represent South Gippsland are evaluated in this light. The structures and strategies are interrogated, the visual identities are evaluated, and the brands are ordered according to their targets, their scopes and their traction.

A thorough audit of South Gippsland's marketing activities covers materials ranging from the years 2006 – 2016. Each is assessed against key brand criteria, extrapolated from a combination of research findings and industry best practice. Materials assessed include assets and campaigns developed by Prom Country Regional Tourism, South Gippsland Shire Council and Destination Gippsland.

To inform qualitative and quantitative analysis of South Gippsland's brand framework and its promotional performance, this report also provides comparison data from direct or analogous regional competitors.

Quantitatively, this analysis presents statistical summaries of key criteria for which data exists.



# CHAPTER 1

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## DESTINATION BRANDING NETWORK

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This section reports on Copy Transmission's analysis and formulation of practical definitions of the destination marketing landscape in the state of Victoria, with special attention given to South Gippsland's place within it.

It provides an overview of the existing local and state marketing structures and arrangements. It identifies and examines current trends, challenges and other key factors that influence people when choosing a destination.

The South Gippsland brand is examined within this context. The degree to which South Gippsland's brand aligns with other local, regional and state brands is assessed, and its effectiveness is evaluated against comparable competitor destinations.



## Destination Branding and Marketing

In Australia, destination branding and marketing are centrally governed by a network that connects federal to state, state to regional and regional to the grass roots.

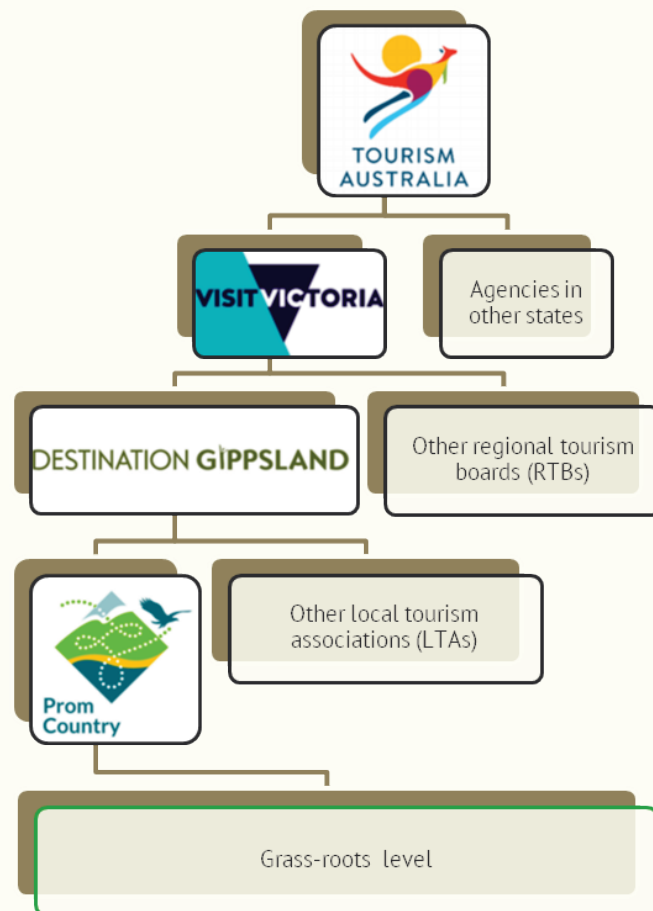
From *Tourism Australia* to South Gippsland's local industry, it flows like a family tree. Various organisations with distinct identities form an interconnected unit.

Through co-operation and delegation, this structure facilitates economies of scale and institutional cross-promotion while still allowing for appropriate management and expression of each distinct identity.

This structure, however, is not rigid. At federal and state level, the organisations are mandated, but regional and metropolitan ones are more a matter of initiative and responsiveness.

By optimising its position within this structure, South Gippsland may find greater operational efficiency and heightened promotional effectiveness.

From a public-facing point of view, the main organisations responsible for destination marketing campaigns and collateral relevant to the South Gippsland brand are structured as shown in the figure below.



Overview of the Destination Branding Network as it relates to South Gippsland

Put simply, broad-level objectives and strategies originate at the top level. They flow through the various agencies and bodies, each of which has the scope to augment, expand upon and enhance the overarching objectives and strategies. This will ideally result in excellent guidance and practical benefits for the local regions and businesses that make-up the grass roots of the structure.

But these communications ought not to be one-sided. When functioning properly, each connection between organisations allows for conversation and two-way influence.

Local initiatives, practical knowledge and grass-roots wisdom originate at the local end of the circuit. This vital input then flows upwards, ultimately informing and impacting upon broad level objectives and strategies.

For a more developed understanding, each of the various organisations and their specific purposes deserve a brief description. For more detailed information about them, links to relevant web pages will be provided where possible.

## Relevant Agencies in the Network

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As noted in *destination branding network* diagram, there are five levels of administration. There are agencies at each level that have a vested interest in the South Gippsland brand. Those agencies are:

- Federal: Tourism Australia
- State: Visit Victoria
- Regional: Destination Gippsland
- Local: Prom Country Regional Tourism
- Grass-roots: Community-led groups



## Tourism Australia

Structural level:	Federal
Geographical purview:	Commonwealth of Australia
Estimated relevant budget:	\$189.3 million (FYE 2015, total) <sup>3</sup>
Website/s:	<a href="http://www.tourism.australia.com">www.tourism.australia.com</a> <a href="http://www.australia.com">www.australia.com</a>



### Level of direct involvement in South Gippsland: Negligible

At the top of the tree is *Tourism Australia*.

Tourism Australia is responsible for *Brand Australia*—that is, how Australia is represented internationally.

Tourism Australia's vision is for Australia 'to be the most desirable and memorable destination on earth.' Their purpose is to 'invite the world to experience the Australian way of life.'<sup>4</sup>

As defined by Tourism Australia, Brand Australia's personality is made up of four characteristics:

- *Welcoming*: We are inclusive and believe our differences are our strengths.
- *Optimistic*: We think positively and look on the bright side.
- *Genuine*: We are real and authentic and truly believe in what we do.
- *Charismatic*: We are warm, down to earth and likeable. <sup>5</sup>

As explained on [www.tourism.australia.com](http://www.tourism.australia.com) (accessed 6 June 2016), Tourism Australia sets the big-picture international promotional agenda for the nation. Since 1 July 2014, they have focussed exclusively on international marketing. In 2014-15, Tourism Australia's *Restaurant Australia* campaign aimed to put 'the spotlight on Australia's finest array of produce served in the most stunning locations in the world.' In 2015-16, food and wine continued to be central themes, while Australia's world class aquatic and coastal experiences received a renewed focus.

These campaigns are testament to the fact Tourism Australia believes both *food and wine* as well as *coastal lifestyle* are major decision factors in Australia's key tourism markets.

Given the exclusively international focus of Tourism Australia and the mostly domestic targets of the South Gippsland brand, Tourism Australia's level of direct local involvement is negligible. However, there are synergies between Tourism Australia's current marketing focus and South Gippsland's product offering. These will be explored in more detail shortly.

<sup>3</sup> Tourism Australia, *Tourism Australia Annual Report 2014-2015*. Sydney: 2015.

<sup>4</sup> *ibid.*

<sup>5</sup> *ibid.*

## Visit Victoria

Structural level:	State
Geographical purview:	Victoria
Estimated relevant budget:	\$38 million (FYE 2017, State Government funding) <sup>6</sup>
Website/s:	<a href="http://www.visitvictoria.com">www.visitvictoria.com</a> <a href="http://corporate.visitvictoria.com">http://corporate.visitvictoria.com</a>



Since July 2014, the states and territories have been responsible for domestic tourism branding and marketing. Central organisations in each state and territory have a direct connection to Tourism Australia. In Victoria, the central role is occupied by *Visit Victoria*.

Visit Victoria's vision is explained on their corporate website, [corporate.visitvictoria.com](http://corporate.visitvictoria.com) (accessed 6 June 2016), being 'to have a diverse range of outstanding experiences that attract more visitors and drive jobs and investment across the State.'

The purpose, according to state government, is to 'promote all of Victoria as an attractive tourist destination.' This is to be achieved by way of 'major interstate campaigns highlighting regional destinations and continuation of the China brand strategy.'<sup>7</sup>

Intrastate, Visit Victoria connects directly with eleven regional tourism boards (RTBs) and regional campaign committees. Each represents a distinct geographic area within Victoria. Visit Victoria regards their relationship with the RTBs as *strategic partnerships*. They provide funding, marketing guidance and advocacy to the RTBs as well as opportunities to participate in broader promotional initiatives.<sup>8</sup>

Visit Victoria has noted that regional Victoria's reputation is not strong in food, accommodation or culture. As a holiday destination, regional Victoria does not confer *bragability*. As a result, Visit Victoria's regional focus is to promote *get-out-of-the-city* daytrips and overnight trips.<sup>9</sup> The current flagship regional campaign is [Wander Victoria](http://www.visitvictoria.com/marketing/wander-victoria). It aims 'to inspire Victorians—particularly Melburnians—to... rediscover and reconnect with Victoria's regions'.<sup>10</sup>

**NB.** At the time of writing, Victoria's peak tourism body has heretofore operated under the name *Tourism Victoria*. Visit Victoria—a new entity as of 2015—unites *Tourism Victoria* and the *Victorian Major Events Company* under the same banner.<sup>11</sup> Progressively assuming responsibilities, Visit Victoria is expected to be fully operational from the beginning of the 2016-2017 financial year, **one day after** the submission date of this report. For maximum projected accuracy at the time of reading, this report will refer to the state-level tourism organisation as *Visit Victoria*.

<sup>6</sup> State Government of Victoria, *Victorian Budget 2016/2017—Tourism*. Melbourne: 2016.

<sup>7</sup> *ibid.*

<sup>8</sup> Consultation with Visit Victoria: April-June 2016.

<sup>9</sup> *ibid.*

<sup>10</sup> Visit Victoria. *Wander Victoria*. Accessed 7 June 2016: <http://corporate.visitvictoria.com/marketing/wander-victoria>.

<sup>11</sup> Office of the Premier, *Visit Victoria – A New Era For Tourism And Major Events*. Accessed 6 June 2016: [www.premier.vic.gov.au/visit-victoria-a-new-era-for-tourism-and-major-events](http://www.premier.vic.gov.au/visit-victoria-a-new-era-for-tourism-and-major-events).

## Destination Gippsland Ltd

DESTINATION GIPPSLAND LTD

<b>Structural level:</b>	<b>Regional</b>
<b>Geographical purview:</b>	<b>5 ½ shires across the Gippsland &amp; East Gippsland statistical divisions<sup>12</sup></b>
<b>Estimated relevant budget:</b>	<b>\$1.1 million per annum (3-year average)<sup>13</sup></b>
<b>Website:</b>	<a href="http://www.destinationgippsland.com.au">www.destinationgippsland.com.au</a>

Destination Gippsland Ltd is the Regional Tourism Board (RTB) and peak tourism body for a large area in Victoria's South East, including the Shire of South Gippsland.

Destination Gippsland's website (accessed 7 June 2016) states that its primary remit is to 'inspire, influence and lead positive outcomes through partnerships across Gippsland.'

Visit Victoria sees RTBs' core function as being to serve as a conduit between the state administration and industry at the grass-roots level, facilitating a two-way flow.<sup>14</sup>

Structured as a not-for-profit public company, Destination Gippsland Ltd is governed by a skills-based board. It is supported by committees and a staff that includes five employees, some of which are part-time.

Destination Gippsland was the first RTB to be formed in Victoria. It was founded in 2008 with the support of Tourism Victoria, Parks Victoria and six local governments: Bass Coast Shire Council, Baw Baw Shire Council, East Gippsland Shire Council, Latrobe City Council, South Gippsland Shire Council and Wellington Shire Council.<sup>15</sup>

Destination Gippsland's funding comes from multiple sources, including annual contributions from the State Government and from each of the local governments within its purview. Destination Gippsland raises additional funds by way of local tourism associations (LTAs) and individual local businesses, each of which may contribute in the form of campaign buy-in.<sup>16</sup>

Like all RTBs, Destination Gippsland's purpose is to work directly with the tourism industry at the regional level. They develop marketing materials and provide strategic marketing direction, expertise, insights and opportunities to industry in their region.<sup>17</sup>

The knowledge, expertise and insights that Destination Gippsland glean from local South Gippsland industry should feed into their regional campaigns and feed up to Visit Victoria to inform broader state initiatives.<sup>18,19</sup>

<sup>12</sup> Phillip Island, which is in the LGA of Bass Coast Shire, is represented by its own RTB, *Destination Phillip Island*. The rest of Bass Coast is represented by Destination Gippsland.

<sup>13</sup> Consultation with Destination Gippsland, 16 June 2016.

<sup>14</sup> Consultation with Visit Victoria: April-June 2016.

<sup>15</sup> Consultation with Destination Gippsland: April-June 2016.

<sup>16</sup> Consultation with Visit Victoria: April-June 2016.

<sup>17</sup> *ibid.*

<sup>18</sup> *ibid.*

<sup>19</sup> Consultation with Destination Gippsland: April-June 2016.

## Prom Country Regional Tourism



<b>Structural level:</b>	<b>Local</b>
<b>Geographical purview:</b>	<b>Shire of South Gippsland</b>
<b>Estimated relevant budget:</b>	~ \$60,000 (membership fees and local government funding) <sup>20</sup>
<b>Website/s:</b>	<a href="http://www.visitpromcountry.com.au">www.visitpromcountry.com.au</a>

Prom Country Regional Tourism (PCRT) is the Local Tourism Association (LTA) for South Gippsland. Representing a local government area, LTAs are intended to nurture and strengthen tourism businesses by working directly with operators. They provide marketing opportunities, produce local tourism collateral and facilitate industry development events. They also represent local operators to local government and RTBs.

A membership-based organisation, PCRT's membership fee income is matched dollar-for-dollar by local government. South Gippsland Shire Council allocated \$67,000 for the arrangement in FYE2016, with PCRT only receiving the part of this that matches membership fee income.<sup>21</sup> This causes some uncertainty for some of PCRT's strategic planning.

Being co-funded, PCRT is obliged to serve as the voice of South Gippsland's local operators (to earn its membership fees), as well as the shire's natural attractions (to justify the council's contribution).

PCRT is governed by a board comprised of representatives from:

- local industry (member businesses)
- Parks Victoria (1 representative appointed by Parks Victoria)
- South Gippsland Shire Council (2 voting representatives, including 1 shire councillors and 1 tourism development officer).

A second councillor and the Shire's Visitor Information Centre coordinator are observing members of the PCRT board, but do not have voting rights.

The executive officer of PCRT sits on Destination Gippsland's *Industry Development Committee*.

PCRT is the most prominent flag bearer of the *Prom Country* brand and the organisation responsible for [www.visitpromcountry.com.au](http://www.visitpromcountry.com.au).

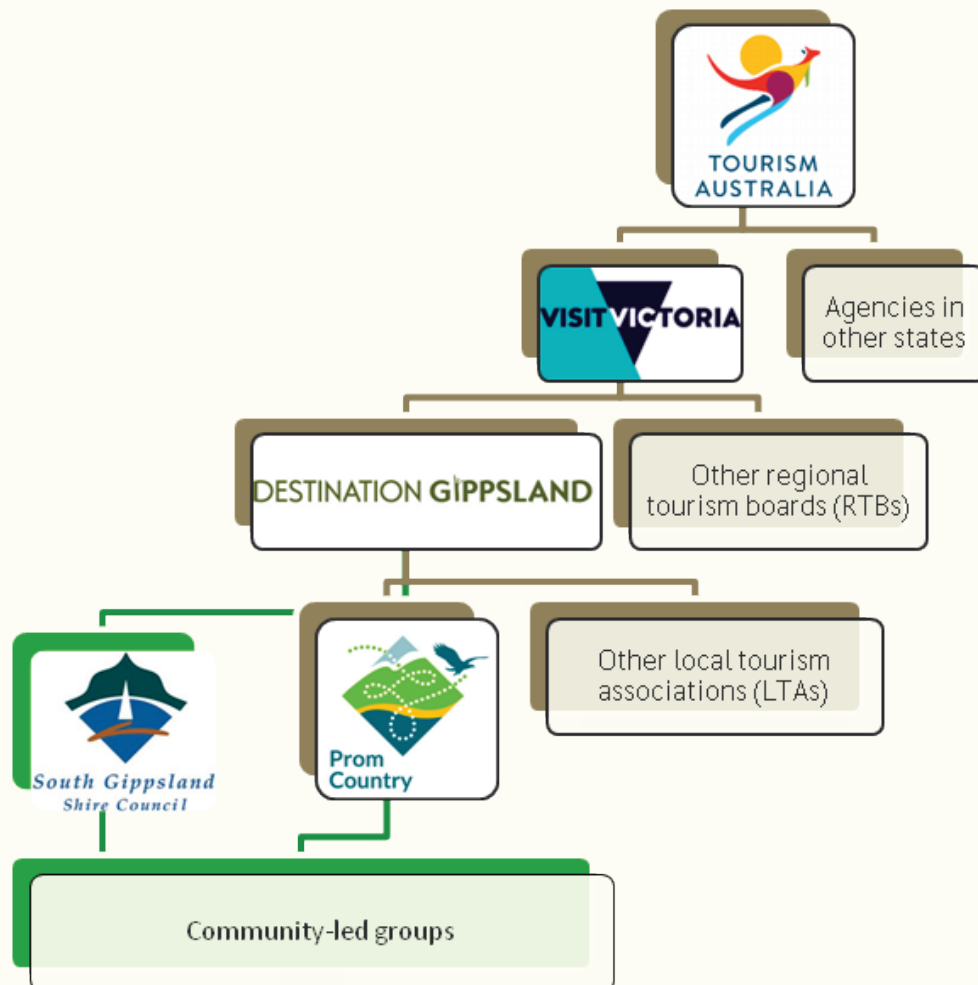
<sup>20</sup> Consultation with SGSC: April-June 2016.

<sup>21</sup> *ibid.*

## Prom Country :: Organisational Stakeholders

Prom Country has some important stakeholders that have a lot to gain from the brand's success. These include the *South Gippsland Shire Council* as well as a number of engaged and active *community-led groups*.

There are likewise a number of businesses that trade on the recognition of *Prom Country*—Prom Country Cheeses and Prom Country Farmers Market being but two examples. These also have a vested interest in the success of the Prom Country regional brand.



## South Gippsland Shire Council



<b>Structural level:</b>	<b>Local</b>
<b>Geographical purview:</b>	<b>Shire of South Gippsland</b>
<b>Estimated relevant budget:</b>	<b>\$837,000</b> (FYE 2016, total) <b>\$330,000</b> (Economic Development) <b>\$194,000</b> (Tourism Development & Promotion – includes allocation to PCRT of \$67,000 which is not spent in full) <b>\$313,000</b> (Visitor information centres) <sup>22</sup>

**Website/s:** [www.southgippsland.vic.gov.au](http://www.southgippsland.vic.gov.au)

The *Economic Development* and *Tourism* departments at South Gippsland Shire Council (SGSC) provide leadership, support and governance to industry and community.

The primary economic development goal of SGSC is to *improve the economic well being of the community*.<sup>23</sup> It is also within their remit to promote visitation, attract new residents and facilitate business investment.<sup>24,25</sup>

SGSC runs its own Economic Development and Tourism initiatives, and manages the Prom Country Visitor Information Centres. They also promote tourism via their support for:

- PCRT
- Destination Gippsland
- Parks Victoria
- local businesses
- community-based associations.

SGSC provides funding to some of these organisations via direct and ongoing budget allocations. Others receive support in the form of grants, project-specific funding and ad-hoc assistance, such as provision of facilities, distribution and expert advice/advocacy.

Currently, the SGSC has a significant presence on the PCRT board, including a tourism development officer, two councillors and the coordinator of Visitor Information Centres.

The tourism development officer also sits on the Destination Gippsland *Industry Development Committee*. Further, Shire CEO Tim Tamlin is an observing member of the Destination Gippsland board.

<sup>22</sup> Consultation with SGSC: April-June 2016.

<sup>23</sup> South Gippsland Shire Council, *Economic Development & Tourism Strategy 2015 – 2020*. Leongatha: November 2014. p.14.

<sup>24</sup> Consultation with SGSC: April-June 2016.

<sup>25</sup> *ibid.*

## Community-led groups

<b>Structural level:</b>	<b>Grass-roots</b>
<b>Geographical purview:</b>	<b>Townships</b>
<b>Estimated relevant budget:</b>	<i>Unknown</i>

The grass-roots of South Gippsland's destination network are local businesses. Businesses, associations and operators make a significant direct contribution to the experience of visitors and residents alike.

Community-led groups are the primary way that businesses can have positive input into the branding network.

In the South Gippsland region, nine such associations are currently recognised by the Shire:

- Beaches & Rivers Association
- Fish Creek Development Group
- Foster Chamber of Commerce
- Korumburra Business Association
- Leongatha Chamber of Commerce & Industry
- Loch Community Development Association
- Meenyan Tourism and Traders Association
- Mirboo Country Development Inc
- Tarwin Valley Development Group

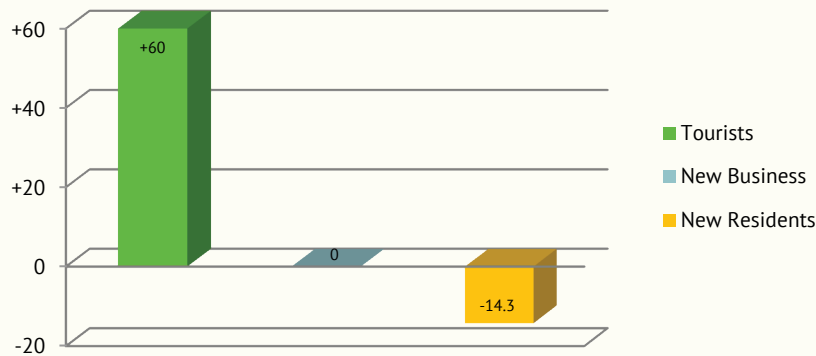
The local wisdom, intimate knowledge of products and attractions, and practical on-the-ground experience possessed by these stakeholders can usefully inform the development of effective destination marketing efforts.

It is important that these groups be *plugged-in* to the structure. Their input must flow back through the network, directly influencing local initiatives and influencing regional and state ones too. The key relationship in this regard is membership to their LTA, Prom Country Regional Tourism.



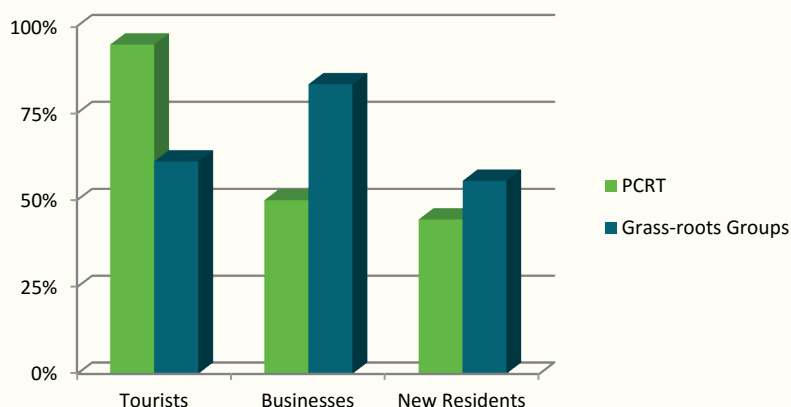
## Perceptions of efficacy for community-led groups

Many tourism and economic development officers across the Gippsland Local Government Network (GLGN) regard community-led groups as important for attracting tourists (charted in green, below).



*Net influence of community-led groups on attracting target segments, as per GLGN tourism and economic development officers*

Those same GLGN officers do not rate such associations highly for directly attracting *new businesses* to their regions—with a net perceived influence score of zero. Likewise, they predominantly believe that such groups have no direct role to play in attracting new residents (score = -14.3). This could be due to the real strategic focus of the groups, visibility of effective success or capability niches within governmental operations into which the groups would ideally slot. In South Gippsland specifically, however, the influence of these groups is perceived far more positively for audiences other than tourists. In fact, South Gippsland's community-led groups are seen as being mostly important for attracting new businesses to South Gippsland.



*'Which organisations are important to attract...', as per SGSC respondents*

These different perceptions could indicate that community led groups in South Gippsland are intrinsically more business focussed. Alternatively, it may be a result of the fact that PCRT is relatively well-regarded for tourism promotion, therefore the community-led groups can focus on other areas.

## Indirect Marketing Bodies

There are three other marketing bodies of note within the regional branding landscape:

- Victoria Tourism Industry Council
- Cultural Tourism Victoria
- Parks Victoria.

### Victoria Tourism Industry Council

<b>Structural level:</b>	<b>State</b>
<b>Geographical purview:</b>	<b>Victoria</b>
<b>Estimated relevant budget:</b>	<i>Unknown</i>
<b>Website/s:</b>	<a href="http://www.vtic.com.au">www.vtic.com.au</a>



The website of Victoria Tourism Industry Council (accessed 8 June 2016) describes them as 'the peak body for Victoria's tourism and events industry'. They provide advocacy and policy development, product accreditation and run industry development events.

A membership body, VTIC also provides members with industry news and information, connections to tourism and events professionals, accredited training and employer advice.

VTIC declined participation in the consultation phase of this project.

### Cultural Tourism Victoria

<b>Structural level:</b>	<b>State</b>
<b>Geographical purview:</b>	<b>Victoria</b>
<b>Estimated relevant budget:</b>	<i>Unknown</i>
<b>Website/s:</b>	<a href="http://www.culturaltourismvictoria.com.au">www.culturaltourismvictoria.com.au</a>



The website of Cultural Tourism Victoria (accessed 8 June 2016) describes them as 'the peak membership & advocacy body for organisations and tourism operators providing cultural tourism services in Victoria.'

A not-for-profit group operating under a committee of management, Cultural Tourism Victoria offer professional development and networking events for the cultural tourism industry. They also produce quarterly newsletters and an annual *Cultural Guide* in partnership with Visit Victoria.

Cultural Tourism Victoria has little direct involvement with the South Gippsland destination branding network. They declined participation in the consultation phase of this project.

## Parks Victoria



<b>Structural level:</b>	State
<b>Geographical purview:</b>	<b>4.11 million hectares of public land across the state</b>
<b>Estimated relevant budget:</b>	<b>\$77 million</b> (FYE 2015 State Government funding) <sup>26</sup> <b>\$5 million per annum</b> (FYE 2016-2020, specific funding for infrastructure to encourage more visitors and nature-based tourism) <sup>27</sup>
<b>Website/s:</b>	<a href="http://parkweb.vic.gov.au">http://parkweb.vic.gov.au</a>

As described on its own website (accessed 7 June 2016), Parks Victoria is a state-level statutory authority with relevance to the regional marketing structure.

Parks Victoria are particularly relevant to South Gippsland's brand because they are the custodians Wilsons Promontory National Park, along with other natural attractions within the shire.<sup>28</sup>

During consultation, Parks Victoria told Copy Transmission that the organisation sees itself foremost as being 'in the tourism industry'. Nonetheless, Parks Victoria has virtually no funding for direct marketing activities.<sup>29</sup>

As such, Parks Victoria's main function from a marketing point of view is to serve in an industry advisory capacity, including:

- direct interaction with Visit Victoria.
- appointing a representative to the Victorian Tourism Awards panel.
- a representative on the board of Destination Gippsland
- a representative on the Wilsons Promontory Advisory Group
- a representative on the board PCRT
- consultation and co-operation with South Gippsland Shire Council
- consultation and collaborate with accommodation businesses.<sup>30</sup>

Despite their lack of dedicated marketing funding, Parks Victoria annually contributes to the Prom Country Regional Tourism tourist guide, purchasing the back page for 'as long as they can remember'.<sup>31</sup>

<sup>26</sup> State Government of Victoria. *Parks Victoria Annual Report 2014-15*, Melbourne: 2015. p.25.

<sup>27</sup> State Government of Victoria. *2016-17 State Budget: What's in it for Victoria's Visitor Economy?* Melbourne: 2016.

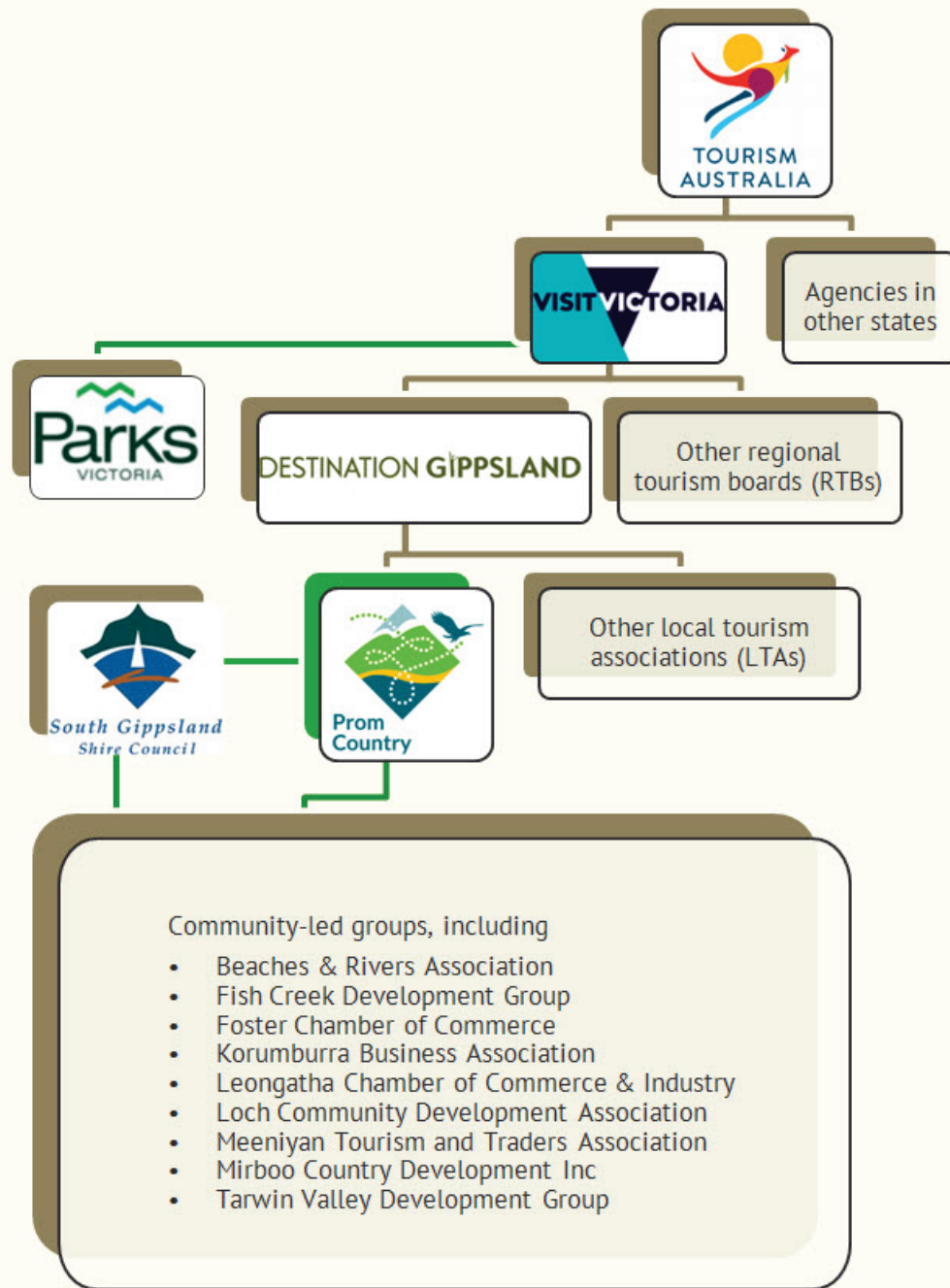
<sup>28</sup> Consultation with Parks Victoria: April 2016.

<sup>29</sup> *ibid.*

<sup>30</sup> *ibid.*

<sup>31</sup> *ibid.*

## Our Destination Branding Network



*The destination branding network, including main stakeholder organisations  
—as it pertains to the South Gippsland Brand Review*



## CHAPTER 2

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# TRENDS & CHALLENGES FOR DESTINATION BRANDING

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# Upstream Trends

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## Nationwide Trends & Challenges

As noted in *Victoria's 2020 Tourism Strategy*,<sup>32</sup> there are certain trends and challenges that affect all levels of the Australian destination branding network. These include:

- increased international travel reducing domestic visitation (p.9-10)
- domestic travel is increasingly for short-breaks rather than long stays (p.9-10)
- most consumers now use the web to research and book travel (p.9-10)
- Global financial volatility are leading to reduced discretionary spending (p.9-10)
- Bushfires, floods, droughts, blue green algae outbreaks and locust plagues are impacting on many regional Australian destinations. (p.9-10)
- Recognised skill shortages for cooks, service staff, kitchen hands, tourism front office and housekeeping are known to be most pronounced in regional areas. (p.23)

## Victorian Trends & Challenges

*Victoria's 2020 Tourism Strategy* highlights the economic importance of tourism to Victoria future:

By 2020-2021, it is estimated that tourism will contribute approximately \$34 billion to Victoria's Gross State Product (both direct and indirect impacts) and generate an estimated 310,000 (direct and indirect) jobs. (p.6)

It further outlines trends and challenges affecting all levels of the Victorian destination branding network.

- International visitation is projected to grow, especially from Asia. (p.13)
- Interstate visitation is growing slowly, which compared well to Australian averages, which are in negatives. (p.15)
- Intrastate visitation peaked in 2000 (p.15) and is now more likely to be short-trip rather than longer holiday. (p.9-10)
- As of 2013, only 48% of Victorian tourism operators had online booking capability with instant confirmation available for consumers. (p.11)
- From 2000 to 2012, domestic overnight visitation to regional Victoria declined at a rate of 0.5 per cent per annum, with regions located more than 2.5 hours from Melbourne declining more sharply. (p.7)
- low international visitor dispersal. (p.7)
- low awareness of regional experiences in the domestic visitor market. (p.7)

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<sup>32</sup> State Government of Victoria, *Victoria's 2020 Tourism Strategy*. Melbourne: July 2013.



## Regional (Gippsland) Trends & Challenges

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The following trends and challenges affect the entire Gippsland destination network.

### Destination Gippsland: funding structure versus duty

Presently, over 18% of Destination Gippsland's funds come from fund-raising via industry and stakeholder buy-in. In South Gippsland, 14% of respondent businesses said they provide financial support to Destination Gippsland. These respondents may have either (a) signed up for the Australian Tourism Data Warehouse via the Destination Gippsland website, or (b) bought into a Destination Gippsland promotional project.

In this way, commercial contributors to Destination Gippsland are given promotional priority that is not available to those who do not contribute. It may be for this reason that many stakeholders across the region errantly believe it to be a membership agency.

In fact, confusion between whether Destination Gippsland is a membership body or a fee-for-service body should be moot: with 82% of funding from other sources and a primary remit to serve as a conduit between the state administration and industry at the grass-roots level, the agency *should* produce positive outcomes for each local government area (LGA), regardless of how many individual businesses contribute additional funds.

This is *somewhat* the case. While 14% of respondent South Gippsland businesses have paid to benefit from Destination Gippsland's services, 37% of respondent businesses say they benefit from the organisation's activities. This evidences that benefits are perceived even outside of the contributing group—albeit still a minority.

### Destination Gippsland: stakeholders versus accountability

Destination Gippsland's accountabilities are not very clear.

As an RTB, Destination Gippsland is funded by Visit Victoria to liaise with local industry and LTAs (such as PCRT). It is obliged to represent the interests of local stakeholders. Those interests may be served by promotional campaigns, providing information, expertise and industry development activities as well as serving as a conduit to send grass-roots insights along to Visit Victoria.<sup>33</sup>

It is unclear by which specific measures or *Key Performance Indicators* Destination Gippsland is held to account by Visit Victoria.

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<sup>33</sup> Consultation with Visit Victoria: April-June 2016.

Destination Gippsland also receives funds from the local level. One way those funds are channelled is through annual contributions from GLGN member councils—of which SGSC is one.

Destination Gippsland has a service agreement with the GLGN. Copy Transmission has not been provided with this document, however Destination Gippsland advised that this agreement describes broadly stated activities, short and long term objectives and strategies rather than firmly defined deliverables and measurable key performance indicators.<sup>34</sup> The activities, objectives and strategies are as reported upon in Destination Gippsland annual reports.<sup>35</sup>

By this information, there is little or no evidence that Destination Gippsland's funding from GLGN member councils—including South Gippsland Shire—is currently tied to measurable achievements.

Destination Gippsland, then, may effectively operate in line with their current agreements. If broadly stated activities and the deployment of strategies are the extent of its remit, then Destination Gippsland is justified in focussing on those. Indeed, if raising additional funds from local businesses can improve these outcomes, then Destination Gippsland seems justified in pursuing that too. However, this current model contributes to certain problems which will be discussed in more detail shortly.<sup>36</sup>

An opportunity may exist to improve the operational understanding, efficiency and effectiveness of regional and sub-regional co-promotion in Gippsland by more clearly defining measures by which Destination Gippsland may be held to strategic account.

## Destination Gippsland: perceived effectiveness

Destination Gippsland is perceived by a number of distinct stakeholder groups as lacking effectiveness. These stakeholder groups include:

- Gippsland local government officers
- SGSC representatives
- Constituent evaluations

There is some evidence that this perceived lack may be partially based on a misattribution of responsibility. The negativity may be based on valid observations, but it could also be exaggerated by misunderstanding of the roles and responsibilities of the agencies involved.

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<sup>34</sup> Consultation with Destination Gippsland: April-June 2016.

<sup>35</sup> Destination Gippsland, *Annual Report 2014-2015*. Mirboo North: 2015.

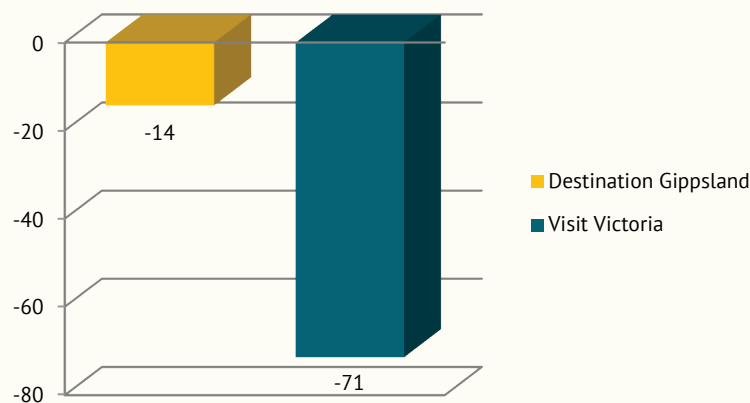
<sup>36</sup> See *Local (South Gippsland) Trends & Challenges*, later in this chapter.

## Gippsland local government officers perspectives

Copy Transmission surveys and consultation found significant negative perceptions from the local government cohort.

When asked 'For your shire, which agencies and organisations most contribute to the promotion of tourism?' only one third of Gippsland Local Government Network (GLGN) tourism and economic development personnel respondents cited Destination Gippsland.

In fact, a high proportion of GLGN officers expressed negative views about how Destination Gippsland and Visit Victoria portray their shire.



*Net approval scores, as per GLGN Survey respondents*

Destination Gippsland was significantly into negative territory with a net approval score of -14. Visit Victoria was deep into disapproval, with a net approval score of -71.

## SGSC perspectives on Destination Gippsland

SGSC respondents revealed a concern that there was not enough focus on sub-regional diversity in campaigns:

...Greater focus needs to be on strengths of the individual regions that make up Gippsland, one campaign fits all needs to be reassessed. To better facilitate growth it would be good if all advertising reference the local website as well. Greater interaction between DG and local associations is required.

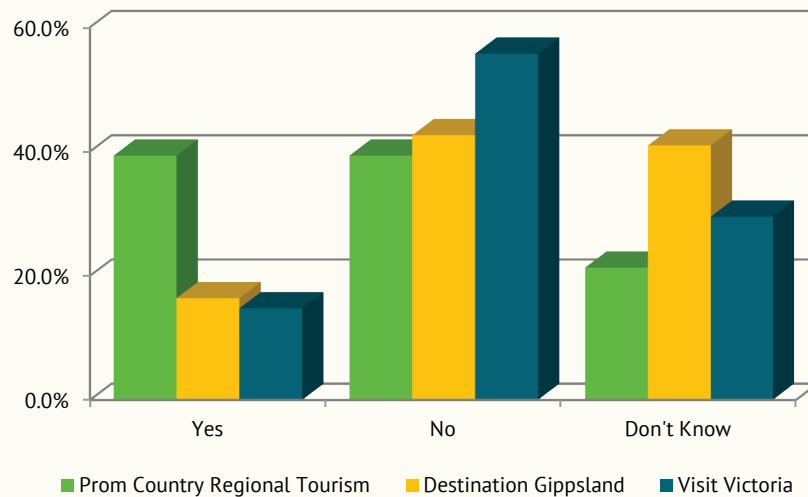
Overemphasis on certain regions or attractions at the expense of others was another issue. One respondent noted that 'DG needs to promote the whole of the Sth Gipps shire to Victoria, Interstate and National visitors' while another observed 'much focus on Phillip Island, Baw Baw and East Gippsland but not so much for South Gippsland.'

SGSC is a key stakeholder in Destination Gippsland. Visit Victoria rightly sees co-operation between local governments and regional tourism boards as pivotal.<sup>37</sup> Perceptions as reported here pose an issue that must be addressed to ensure the future effectiveness of the destination marketing framework.

<sup>37</sup> Consultation with Visit Victoria: April-June 2016.

## Constituent evaluations

When South Gippsland residents were asked to evaluate how well they felt their shire was represented by the key agencies the destination marketing network. The data gathered is represented in the chart below.



*'Do these destination marketing organisations represent the shire well?',  
as per South Gippsland residents*

Prom Country Regional Tourism receives the highest level of endorsement, with 39.3% of all respondents approving of how they represent the shire.

Neither Destination Gippsland nor Visit Victoria fared well on this measure. Both of these agencies had higher levels of uncertainty than PCRT. Of those who were certain, only 14.8% approved of their representations.

For Destination Gippsland, the reasons for their lack of approval was almost evenly split between 41% of respondents who simply didn't know and 42.6% who outright disapproved of how they represented the shire.

54.1% of respondents outright disapproved of how Visit Victoria represents the shire.

## Potentially misattributed responsibility

It must be noted that these perceptions may be at least partially based on a misattribution of responsibility. This is not to say that negative feelings are not justified, only that the roles and responsibilities of the agencies receiving disapproval may not be clearly understood.

Firstly, content that appears on [visitvictoria.com.au](http://visitvictoria.com.au) is largely a product of the involvement of RTBs: Destination Gippsland has a great deal of influence over portrayals of Gippsland that appear on the Visit Victoria website.<sup>38</sup>

<sup>38</sup> Consultation with Visit Victoria: April-June 2016.

Secondly, the extent to which regional businesses buy into Australian *Tourism Data Warehouse* (ATDW) listings has a significant impact on what appears on visitvictoria.com.au and other websites.

## Decreasing perceived value of regional visits

During consultation, Visit Victoria highlighted that it is increasingly difficult to sell regional Victoria as a holiday destination.<sup>39</sup>

In *Victoria's 2020 Tourism Strategy*, the state government specifically highlighted the role for RTBs in addressing the challenge:

Regional Tourism Boards have a role in providing advice and guidance on regionally significant investment priorities. In this context, the recently released Great Ocean Road Product Gap Audit highlighted the importance of attracting tourism investment to the region, acting as a blueprint for other regions and a key step in destination planning. (p.21)

## The need for improved infrastructure

The Victorian government has acknowledged a need to:

- improve coordination and planning for tourism in regional areas;
- provide greater flexibility in Green Wedge, Farming and Rural Conservation Zones for tourism developments;
- remove prohibitions on private sector development in national parks and extending maximum lease terms; and
- streamline approval processes on private and public land.<sup>40</sup>

## Dominance of intrastate visitation

Around 87% of Gippsland's overnight visitation is from other Victorians/ 50.56% are from Melbourne. 36.29% are from elsewhere in Victoria.<sup>41</sup>

## Food and wine is the #1 visitor activity

According to *Tourism Research Australia*, food and wine were the #1 activity in broader Gippsland for both overnights and daytrippers in 2015.<sup>42</sup>

## Interstate travellers stay longer and spend more

Although interstate travellers account for only 13.24% of overnights, they make up 22.09% of visitor nights and 22.02% of overnights' total spend.<sup>43</sup>

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<sup>39</sup> ibid.

<sup>40</sup> State Government of Victoria. *Victoria's 2020 Tourism Strategy*. Melbourne: July 2013. p 21.

<sup>41</sup> Austrade. *Gippsland Tourism Demand 2015*. Canberra: 2015.

<sup>42</sup> ibid.

<sup>43</sup> ibid.

## South Gippsland Trends & Challenges

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As part of the destination branding network, South Gippsland must give consideration to all of the national, state and regional issues so-far identified.

Of more direct concern than those broader issues, however, South Gippsland must deal with a number of trends and challenges specific to its situation, as identified by Copy Transmission's research and consultation.

One of the most significant challenges for locality-based destinations is the efficient and effective integration of local industry into the wider destination branding framework.<sup>44,45,46,47,48,49</sup>

This issue is of particular significance to South Gippsland. Across virtually all stakeholders consulted on the matter, there is a clear sense of disconnect between South Gippsland's local industry and the broader Victorian branding framework.<sup>50,51,52</sup>

Stakeholder consultation has identified three key factors contributing to this disconnect:

- 1 Competition for funding between South Gippsland's representative LTA (Prom Country Regional Tourism), and South Gippsland's representative RTB (Destination Gippsland)
- 2 Lack of clearly defined agency roles and accountabilities.<sup>53,54</sup>
- 3 Need for industry education and engagement in destination branding<sup>55,56,57</sup>

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<sup>44</sup> Consultation with Visit Victoria: April-June 2016.

<sup>45</sup> Consultation with Great Ocean Road Regional Tourism: May 2016.

<sup>46</sup> Consultation with Grampians Tourism: June 2016.

<sup>47</sup> Consultation with PCRT: April 2016.

<sup>48</sup> Consultation with Destination Gippsland: April-June 2016.

<sup>49</sup> Consultation with SGSC: April-June 2016.

<sup>50</sup> Consultation with PCRT: April 2016.

<sup>51</sup> Consultation with Destination Gippsland: April-June 2016.

<sup>52</sup> Consultation with SGSC: April-June 2016.

<sup>53</sup> *ibid.*

<sup>54</sup> Consultation with PCRT: April 2016.

<sup>55</sup> Consultation with SGSC: April-June 2016.

<sup>56</sup> Consultation with Visit Victoria: April-June 2016.

<sup>57</sup> Consultation with PCRT: April 2016.

## Low participation-rates in the ATDW

The ATDW was created to increase the digital distribution and online exposure of tourism operators across Australia. It is a joint initiative by Tourism Australia and all of the State and Territory tourism organisations.

It is a centralised content and distribution platform. At one end, tourism businesses are invited to list on the database. At the other end, distribution partners pay for access to the database, which they use to provide searchable listings and targeted results to their online audiences.

## Fees and funding

In Victoria, a single listing is currently priced at \$250 annually.

Some states provide free ATDW listings to tourism operators. Visit Victoria decided upon a subscription model as an additional funding stream for RTBs. Currently, Visit Victoria disperses all funds received from ATDW listings to the RTB responsible for the postcode of the registration. Therefore, fees from South Gippsland-based listings go to Destination Gippsland.<sup>58</sup> To earn this fee, Destination Gippsland promotes ADTW listings.

## Benefits of listing

The benefits of a listing are outlined in Destination Gippsland promotional material.<sup>59</sup> Listed businesses are entered into a database hosted by the ATDW and thereby become searchable on visitvictoria.com.au and elsewhere.

Nevertheless, many local businesses remain unconvinced that listing benefits justify the \$250 outlay. If there are good prospects for a return on investment, it is not being well-sold to South Gippsland industry.

## South Gippsland specific

Destination Gippsland has observed that rates of buy-in to the ATDW are lower in South Gippsland than other GLGN shires.<sup>60</sup> From Country Regional Tourism acknowledges that 'the majority [of PCRT members] are not listed on visitvictoria.'<sup>61</sup>

If many South Gippsland businesses were on the system, the region would be better represented and may seem like a preferred destination. Of course, this is unlikely to happen while the businesses perceive it as a poor value investment.

While certainly an issue in itself, low ATDW participation rates may in fact be a symptom of deeper organisational challenges.

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<sup>58</sup> Consultation with Visit Victoria: April-June 2016.

<sup>59</sup> Destination Gippsland. *Marketing Partner Opportunities with Destination Gippsland 2015-2016*. Mirboo North: 2015.

<sup>60</sup> Consultation with Destination Gippsland: April-June 2016.

<sup>61</sup> Consultation with PCRT: June 2016.



## Competition for funding between connected agencies

As connected agencies in the destination branding network, PCRT and Destination Gippsland are meant to be co-operative agencies. Instead, they compete for contributions from South Gippsland businesses.<sup>62,63,64</sup>

### Systemic inversion of strategic priorities

Destination Gippsland depends upon financing from local businesses and organisations for around 18% of its operational budget—the rest comes mostly from GLGN councils, Visit Victoria and other grants.

PCRT funding is tied directly to its membership: even council contributions are calculated by matching membership fees. Therefore, PCRT's annual budget is precarious: it is dependent on membership numbers and must therefore prioritise the selling of memberships.

With both agencies vying for their dollars, South Gippsland businesses must decide whether to spend money on:

- PCRT membership
- Destination Gippsland's promotions and campaigns
- both
- none.

Many local businesses have limited marketing budgets and cannot afford both. As a result, many choose one or the other, if they opt in at all.

This puts Destination Gippsland and PCRT in direct competition for funds.

### Vicious circle

Both Destination Gippsland and PCRT strategically benefit from talking-up their own offering and talking-down the offerings of their rivals.

South Gippsland has the lowest regional campaign participation of any of the GLGN regions.<sup>65</sup> As a result, promoting South Gippsland is a low priority for Destination Gippsland's campaigns. This feeds a perception that it does not adequately represent South Gippsland. As a result, both PCRT and local operators are further discouraged from buying into Destination Gippsland.

### Organisational alienation

As a result, PCRT and Destination Gippsland have become alienated. Because Destination Gippsland plays a pivotal role in the destination branding network—particularly upstream to Visit Victoria—South Gippsland has lost its voice in the wider Victorian context too.

Repairing the connection should be a key priority moving forward.

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<sup>62</sup> Consultation with PCRT: April 2016.

<sup>63</sup> Consultation with Destination Gippsland: April-June 2016.

<sup>64</sup> Consultation with SGSC: April-June 2016.

<sup>65</sup> Consultation with Destination Gippsland: April-June 2016.



## Lack of clearly defined roles & accountabilities

The respective roles and accountabilities of PCRT and DG are not well-defined in relation to one another.

PCRT has a Memorandum of Understanding with SGSC that clearly defines their relationship. By that document, PCRT is held accountable for the achievement of specific duties and annual deliverables.

No such agreement exists between PCRT and Destination Gippsland. Likewise, while there is a broadly stated service agreement between the GLGN and Destination Gippsland, it does not include any specific items or accountabilities in relation to South Gippsland Shire Council.<sup>66</sup>

With no formal agreement between PCRT and Destination Gippsland to clarify roles and accountabilities, they are at risk of wasting resources on overlapping activities or errantly presuming that the other agency is fulfilling a necessary function that is in fact being overlooked by both.

Although PCRT is offered the opportunity to buy in to Destination Gippsland campaigns, its relatively limited budget forces a choice between participation with Destination Gippsland, or to use those funds to pay for an independent campaigns. The choice is often the latter, on the basis that it gives them greater control over the promotion of the specific interests of their members.

While acknowledging that both bodies express a genuine willingness to work together (previously stated issues notwithstanding) the lack of clear understanding can be problematic.

A case in point: PCRT and Destination Gippsland recently ran independently funded promotions in the same issue of Royal Auto magazine.<sup>67</sup> One was a campaign promoting cycling trails. The other was a campaign promoting scenic drives. These simultaneous promotions led to a competition between each agency's call to action. Strategically, better outcomes may have been achieved through co-ordinated, staggered campaign timing. The regional awareness-raising activities could have been spread over two issues of the magazine, and maintained the integrity of each promotion's call-to-action.

One respondent from the SGSC noted that there is:

Significant opportunity for DGL and PCRT to establish a much closer working relationship. This could include the development of a formal MoU outlining how the brand is cooperatively managed and clearly defining roles and responsibilities.<sup>68</sup>

Establishing some clear guidelines for future parameters of cooperation will not only help prevent such costly accidental competition in the future, but also improve efficiency, minimise duplication of efforts and maximise campaign leverage. Such guidelines will also be beneficial in clarifying the destination branding framework for local businesses.

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<sup>66</sup> Consultation with SGSC: April-June 2016.

<sup>67</sup> Consultation with Destination Gippsland: April-June 2016.

<sup>68</sup> Consultation with SGSC: April-June 2016.

## Industry education and engagement

Local industry consultation has revealed a number of proactive and engaged local business operators in South Gippsland. These businesses tend to be engaged with local industry associations and the various tourism bodies at both the community, local and regional levels.

However, extensive industry consultation identified an opportunity to engage a larger proportion of local business in destination marketing efforts through better industry education. In South Gippsland specifically, it has been recognised that much of the wider business community – much of which is affected by visitation – does not have a clear understanding of a) the basic principles of destination marketing b) the resources and bodies at the disposal of local business and c) a clear and simple picture of how all the various pieces all fit together.<sup>69,70,71,72</sup>

Rising to this challenge will help grow destination marketing resources in South Gippsland and ensure that local industry is more strongly represented up and down the destination marketing chain.

## Partnering for mutual benefit with neighbouring shires

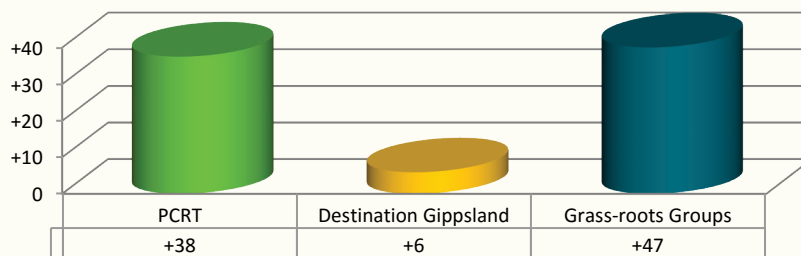
Findings of Copy Transmission's survey of key tourism and economic development personnel from all six GLGN governments found virtually unanimous agreement that there is good cooperation between regions.

There exists a particularly close and mutually beneficial relationship between South Gippsland Shire Council and Bass Coast Shire Council. This is evidenced by a history of past marketing collaboration.<sup>73</sup>

## Relative perceptions of destination network agencies

### South Gippsland Shire perceptions

PCRT and community-led groups are regarded by SGSC as reasonably appropriate representatives of South Gippsland.



*Net approval scores of relevant destination marketing agencies,  
as per SGSC respondents*

<sup>69</sup> Consultation with PCRT: April 2016.

<sup>70</sup> Consultation with SGSC: April-June 2016.

<sup>71</sup> Consultation with Visit Victoria: April-June 2016.

<sup>72</sup> Consultation with Grampians Tourism: June 2016.

<sup>73</sup> Consultation with SGSC: April-June 2016.

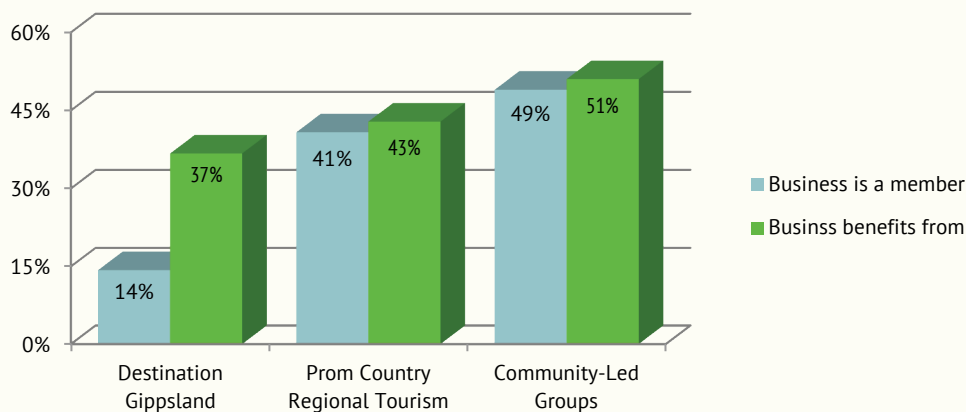
More respondents felt they knew enough about Destination Gippsland to give an informed opinion, but almost half of those said that it *does not represent South Gippsland well*. Destination Gippsland's efforts earned a net approval score of +6 from SGSC representatives. This indicates that there are almost as many disapproving responses as there are approving ones.

## Local Business perceptions

Surveys and consultation indicates a more positive perception of key tourism bodies among local business operators.

69% of respondent businesses were members of at least one tourism and/or business association, organisation or group, with community-led groups being the most popular.

### Organisational affiliations



49% of businesses are members of a grass-roots community group and 41% are members of Prom Country Regional Tourism. Both of these types of organisation are acknowledged as benefiting the business community beyond just their members: a few businesses that are not members admit to benefitting from their activities.

14% of respondent businesses provide financial support to Destination Gippsland. Far in excess of the businesses who have paid to benefit from Destination Gippsland's services, 37% of businesses say they benefit from the organisation's activities. While this is the lowest of the three possible affiliations, it is only a few points lower than the rating given to PCRT.

## Seasonality of visitation

The *Prom Country Economic Impact and Visitor Profile (2013)*<sup>74</sup> clearly identified the need mitigate the extremely seasonal nature of visitation to South Gippsland.

To improve visitation to the region in off-seasons (outside of summer and spring months) the study recommended:

- product development
- increased promotional/marketing efforts. (p.2,46,9)

These findings have been echoed during the consultation phase of this project. There is a sense that the inherent seasonality of nature-based visitation is leading to overly restrained investment and development in South Gippsland tourism.<sup>75,76</sup> Ironically, investment in new strategies and facilities is likely to be one of the only ways that this will be overcome.

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<sup>74</sup> Walters, G. and Driml, S. *Prom Country Economic Impact and Visitor Profile - Executive Summary & Recommendations 2012/13*. Brisbane: University of Queensland, 2013. pp. 2, 4, 6, 9.

<sup>75</sup> Consultation with PCRT: April 2016.

<sup>76</sup> Consultation with SGSC: April-June 2016.



## CHAPTER 3

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### SOUTH GIPPSLAND'S BRAND VIRTUES

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# Introduction

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To achieve and maintain a clearly recognisable identity over time, all brands must ensure that certain core values are well expressed, along with the satisfaction of certain benchmarks for communicational consistency.

## Need for brand guidelines

As a matter of best practice, these standards should be clearly documented in a set of brand guidelines. These brand guidelines should then be understood and applied by all agents of the brand.

Brand guidelines establish rules of execution that keep a brand strategically on track. They set the ideals that all of the brand's communications should strive to fulfil.

Importantly for projects like this, brand guidelines provide a centrally accessible and objective basis for evaluating the effectiveness of a brand's expressions and activities.

South Gippsland Shire Council has not provided any formal documentation of brand guidelines.

Similarly, Prom Country Regional Tourism has been unable to provide brand guidelines.

## Extrapolating virtues

Although performed over a relatively short period of time, Copy Transmission's extensive research provides a basis upon which the foundations of this brand identity may be built. While these measures will not provide a long-term replacement for formal brand guidelines, they do make for a reliable solution to the problem that arises out of South Gippsland's current lack.

Copy Transmission's research was multi-faceted, including:

- a thorough literature review
- stakeholder consultation
- key person interviews
- five project-specific surveys.

The surveys included customised sets of questions to gather a good deal of specifically targeted information and opinions from five relevant and clearly delineated populations:

- residents of South Gippsland
- local businesses
- South Gippsland Shire Council
- peer council officers from aligned shires
- visitors and potential visitors.



Each of these groups has its own unique vested interest in the subject matter of the study, as well being able to provide unique insights and perspectives.

Once collated and synthesised, all of the above-listed information sources were analysed to identify the qualities that are commonly regarded as core to the South Gippsland identity. The form the basis of what are henceforth to be regarded as *South Gippsland's Brand Virtues*.

## **Eight Brand Virtues**

Copy Transmission's research revealed eight brand virtues that are key to the success of the South Gippsland brand. These on-brand criteria can themselves be grouped into three categories:

### **1 Inherent**

- natural beauty
- accessibility

### **2 Abstract**

- welcoming
- relaxing

### **3 Monetisable**

- food & fresh produce
- good value accommodation
- quaint villages
- outdoor activities.

## Inherent Virtues

Both *natural beauty* and *accessibility* (to and from Melbourne) are defining traits of South Gippsland's amazing location and landscape. Both are important, but natural beauty has emerged as a hands-down winner throughout Copy Transmission's research.

### Natural Beauty—South Gippsland's flagship virtue

The flagship virtue is the quality that is most commonly identified with and pivotal to the brand. South Gippsland's flagship virtue is its **natural beauty**.

As a theme, natural beauty emerged consistently from the contributions of all respondent groups.

### Natural beauty is #1 for residents

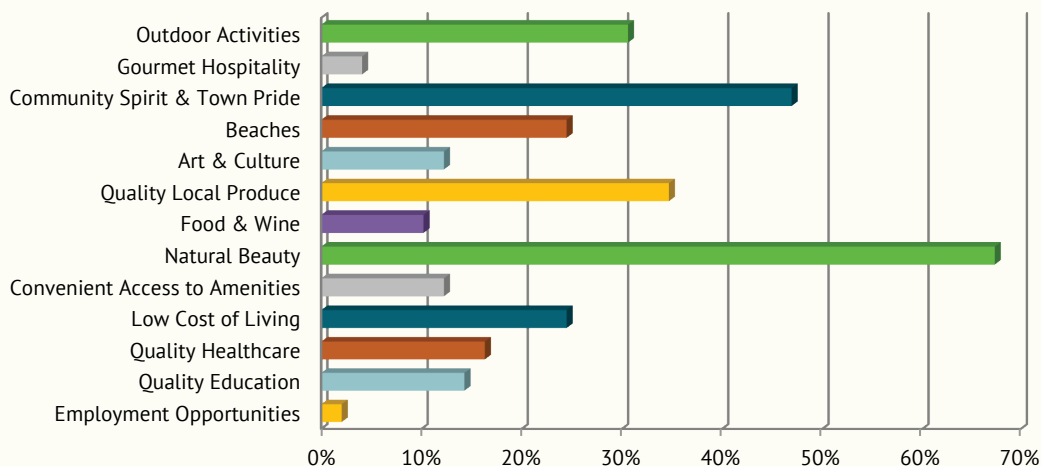
Asked what makes this a great place to live, South Gippsland residents overwhelmingly selected natural beauty as a top feature.

78.7% of respondents cited natural beauty as a main factor. It beat the second most popular response (community spirit) by a definitive margin.

Rank	Feature	Percentage cited
1	Natural Beauty	78.7%
2	Community Spirit	48.9%
3	Outdoor Activities—e.g. cycling, walking, hiking	46.8%
4	Quality Local Produce	44.7%
5	Convenient Access to Amenities	36.2%
6	Beaches	36.2%
7	Quality Education	27.7%
8	Quality Healthcare	27.7%

*Best unique selling points for residents, as per South Gippsland residents*

When local business was asked their perspective on South Gippsland's best unique selling points for residents, *natural beauty* was the only response that was favoured by the majority of businesses.



*Best unique selling points for residents, as per local businesses*

## For new residents

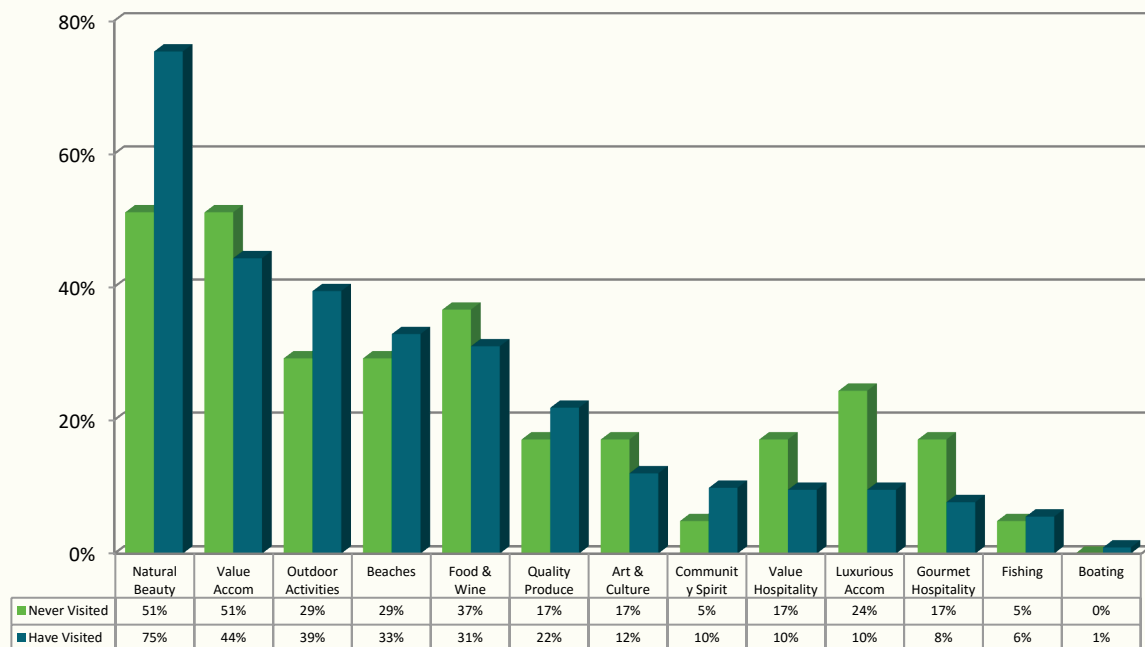
Residents who have moved to the region within the last 5 years were asked to explain the main lifestyle features that attracted them to South Gippsland.

Two out of the three leading features clearly relate directly to natural beauty:

- 1 Landscape and Scenery (85.7%)
- 2 Country Lifestyle (85.7%)
- 3 Natural Beauty (78.6%)

## Natural beauty is #1 for Visitors

A survey of the visitor market found that *natural beauty* is a top priority for people who have visited and/or have shown an interest in visiting South Gippsland.



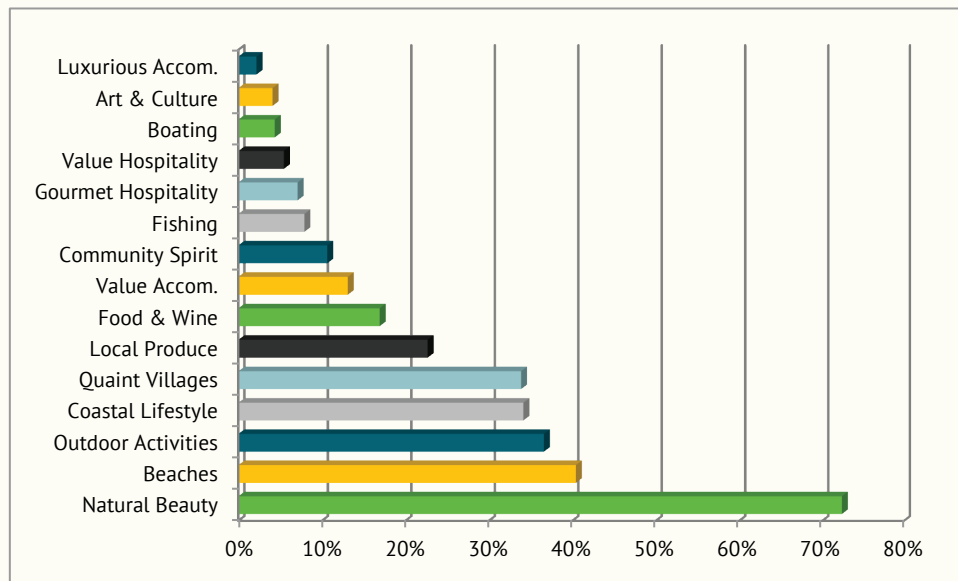
*Travel priorities of the visitor market, showing cohorts who have visited South Gippsland against those who have not yet visited*

When separated into two groups—*past visitors* on one hand and people who have *never visited* on the other—natural beauty is the top or equal top priority for both cohorts.

While the cause and effect relationship may be questioned, the significant discrepancies between results from these two cohorts may be taken to illustrate how these espoused priorities have heretofore translated into the decision-making process. That is, the priority gap between those who have and haven't visited show that people who prioritise natural beauty are significantly more likely to have followed-through on a decision to visit South Gippsland.

This is further borne out by the visitor market responses when asked to name South Gippsland's most attractive features.

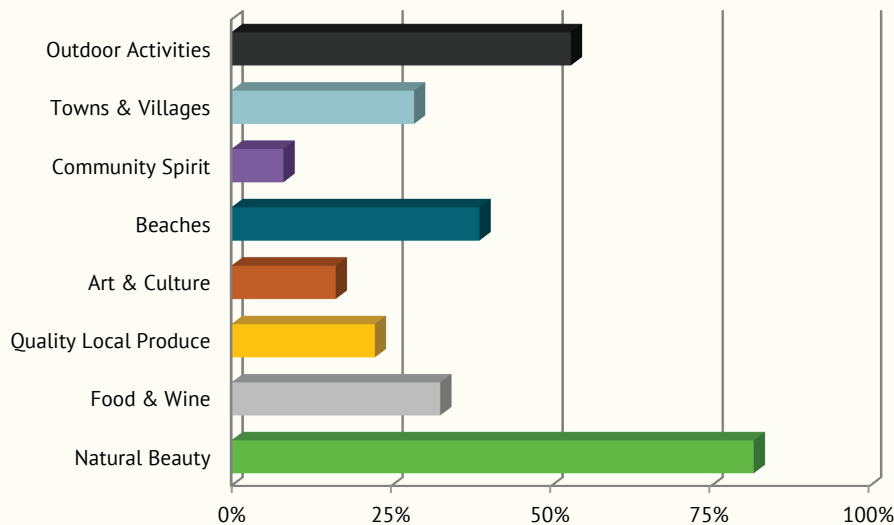




South Gippsland's most attractive features, as per the visitor market

## Natural beauty is #1 for tourism business

When it comes to selling points for visitors, South Gippsland's local businesses agree that it is our shire's *natural beauty* that leads the way (82%).



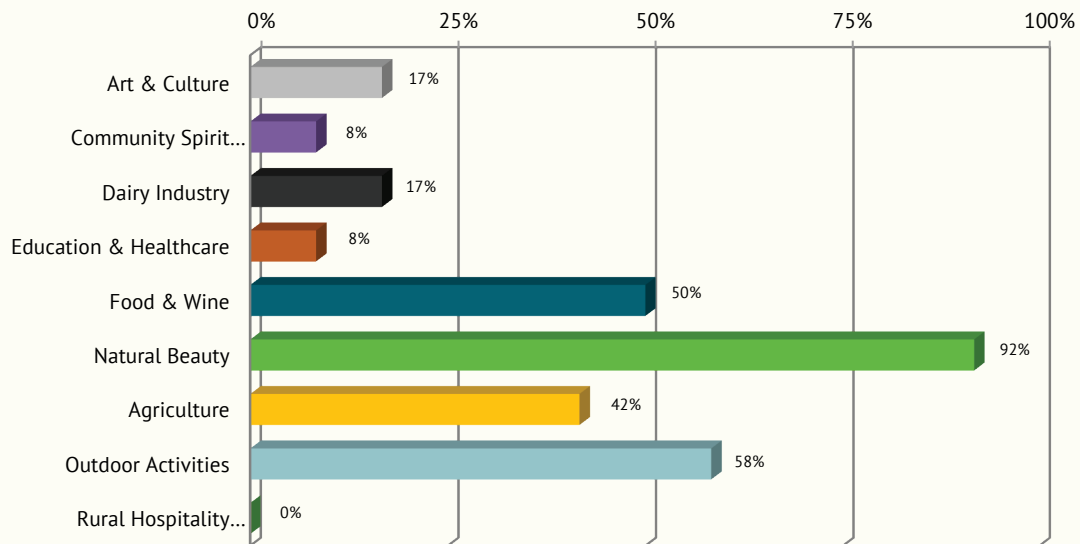
Best unique selling points for visitors, as per local businesses

39% of businesses even rated *picturesque surrounds* as one of the top three factors that encourage new business investment in the shire.

Presumably, residents were thinking along the same lines when they were asked to speculate as to the biggest drawcards that South Gippsland has to attract businesses and new investment to the area. Almost half of respondent residents believe that the natural beauty is a significant factor for business investment, with 47.5% citing the *picturesque surroundings* in their top three.

## Natural beauty is #1 across Gippsland

All of the above research was further corroborated by expert authority insights for the broader Gippsland area. Tourism and Economic Development officers from across the region's six shires clearly identified natural beauty as the best unique selling point for Gippsland as a whole.

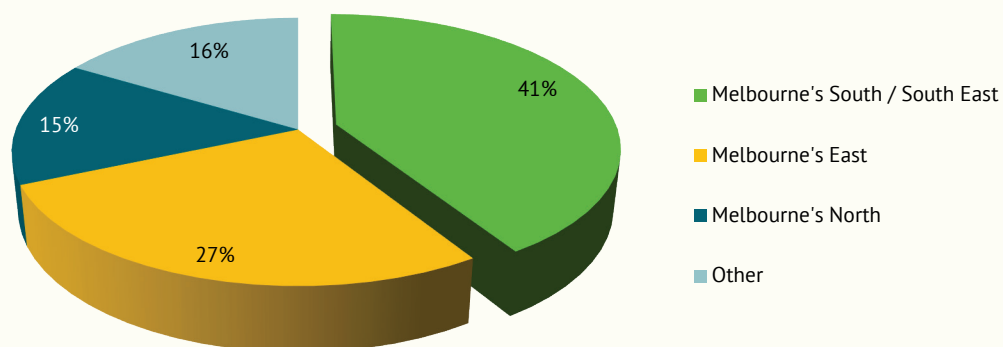


*Gippsland's best unique selling point, as per Tourism & Economic Development Officers*

## Accessibility

It is often mentioned that easy access is a pivotal factor for tourists seeking daytrips or short getaways. Further, many people return for longer holidays to places that they know well. People are more likely to know about things that are close to them.

Copy Transmission's researchers heard similar statements time and again during the consultancy phase of the review project. That anecdotal evidence was well supported by the statistical data gathered from the visitor market survey.



*Top postcodes of the visitor market — geographic clusters*

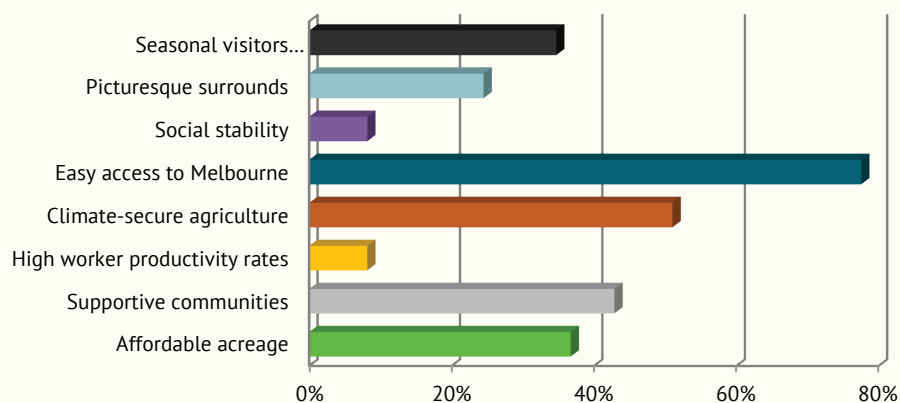
It must also be acknowledged that proximity to Melbourne is of significant benefit to residents and businesses within the shire.

For example, residents identified *easy access to Melbourne* as a main reason for why South Gippsland is a great place to do business.

Rank	Reason given	Percentage cited
1	Easy access to Melbourne	73.8%
2	Supportive Communities	49.2%
3	Picturesque Surroundings	47.5%
4	Affordable Acreage	31.1%
5	Ever-increasing Number of Seasonal Visitors	29.5%
6	Climate-secure Agricultural Opportunities	24.6%

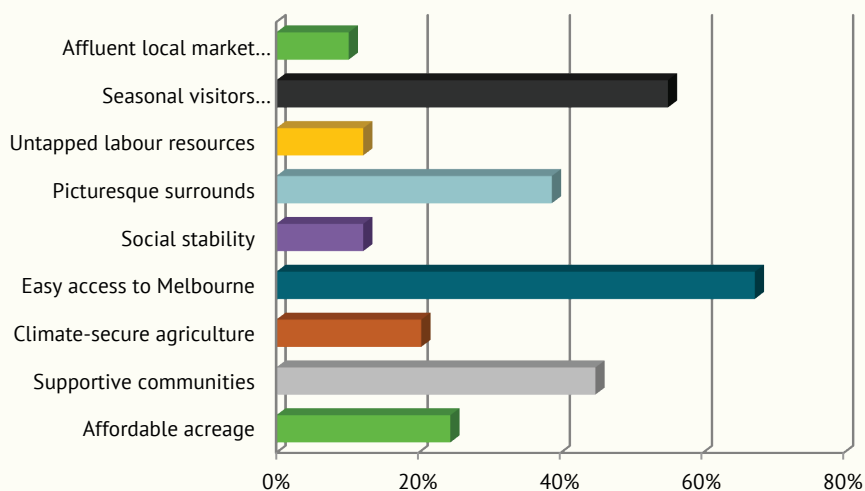
Similarly, when South Gippsland local businesses were asked why large businesses invested here, *Easy access to Melbourne* was clearly the frontrunner benefit that that they perceived (78%).

### Large business invests here because of...



According to the majority of business respondents, *easy access to Melbourne* is again a leading reason why small businesses come to South Gippsland.

### Small business invests here because of...



## Abstract Virtues

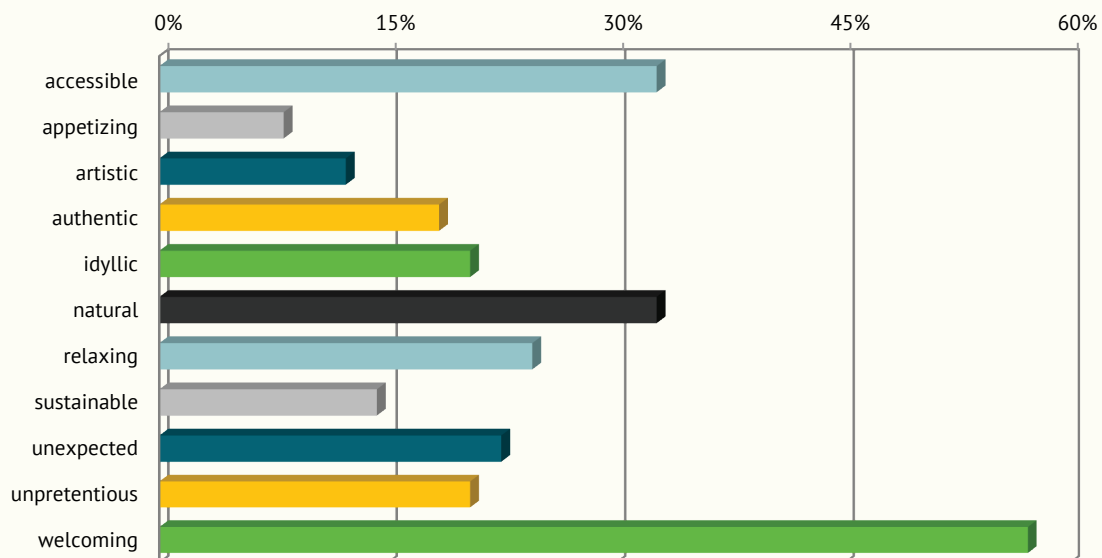
Abstract criteria are emotional, attitudinal or perception-based factors. While they do not directly relate to tactile features, they are important and commonly acknowledged feelings associated with the brand.

As detailed below, Copy Transmission's research revealed that South Gippsland should ideally be shown to be *welcoming* and *relaxing*.

### Welcoming

When asked what trait South Gippsland possesses that should be promoted to newcomers and potential visitors, *welcoming* was consistently a leading response.

Local businesses strongly favoured *welcoming* as a headline boast for the South Gippsland brand, with 57% wanting to express how *welcoming* the shire is.



*'Newcomers and potential visitors should know that South Gippsland is...',  
as per local business respondents*

Residents also believe that newcomers and potential visitors should know that South Gippsland is welcoming.

Rank	Feature	Percentage cited
1	Welcoming	47%
2	Relaxing	34%
3	Natural	28%
4	Accessible	23%

*'Newcomers and potential visitors should know that South Gippsland is...'  
—top four responses from local residents*



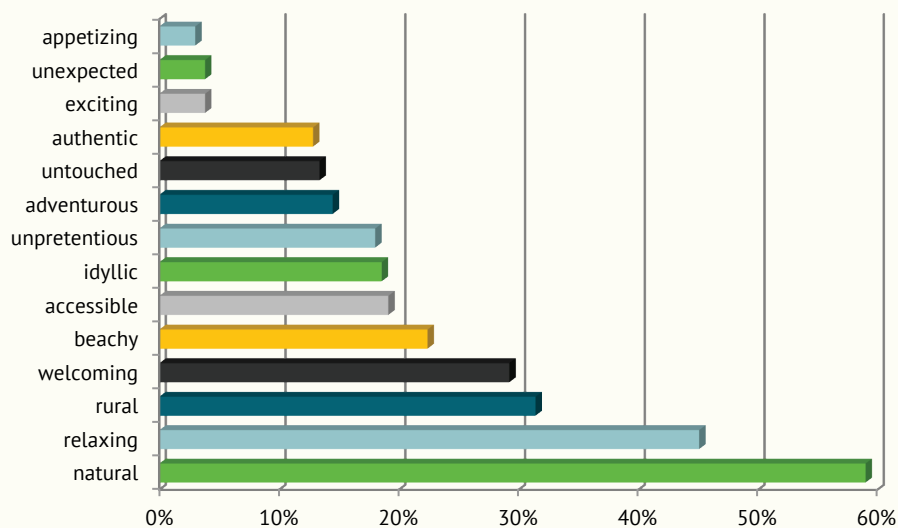
## Relaxing

As seen above, while *welcoming* rates consistently at the top of responses to the relevant question, there are a few other responses that continually appear in 2<sup>nd</sup>, 3<sup>rd</sup> and 4<sup>th</sup> place. In the business survey, for example, these places were occupied by the responses *natural* (33%), *accessible* (33%) and *relaxing* (24%). In the resident survey, the same responses took up the same places, only in a slightly adjusted order.

The consistency with which these traits turn up in these secondary rankings serves to endorse the fact that those same qualities—of being *relaxing*, *natural* and *accessible*—are each a basis for other brand virtues described in this chapter.

Relaxing is a slightly tricky one. It did not come at the top of any of the relevant polls in any of our sample groups. It did, however, consistently rate 2<sup>nd</sup> or 3<sup>rd</sup>.

Importantly, visitors rated *relaxing* one of the most defining features of South Gippsland, second only to the flagship trait, *natural*.



Characteristics that best express the 'South Gippsland' identity,  
as per the visitor market

## Monetisable Virtues

Monetisable criteria are important or commonly sought qualities that may translate directly into saleable attractions or products.

For South Gippsland, the identified monetisable criteria are:

- good food & fresh produce
- good value accommodation<sup>77</sup>
- quaint towns and villages
- outdoor activities.

### Food & fresh produce



Trailing the front two, there were also a significant number of responses for *beaches* (39%), *food and wine* (33%) as well as *towns and villages* (29%). Across the visitor market, neither *food & wine* nor *fresh produce* were particularly well regarded as attractive features that are present in South Gippsland (receiving scores of 17% and 23% respectively). This gap between consumer perception and supply-side understanding presents an opportunity for improvement.

Given the relative ease with which food and fresh produce can be monetised, a heavier marketing emphasis on these qualities may be warranted. If successful, this would be likely to also translate into employment growth and real economic development.

<sup>77</sup> For the visitor market, this relates to good value overnight accommodation. For potential residents and investors, this applies to property affordability.

## Good value accommodation

Good value accommodation is a brand virtue that translates across both visitor and new resident audiences.



### Value and the visitor market

Only 13% of South Gippsland's visitor market perceives value accommodation as a major feature of the region.

However, 45% of visitor market respondents rated value accommodation among their top 3 priorities for travel. That makes it the second highest priority for South Gippsland's current visitor market. This rating rose to equal first (51%) if one isolates the cohort who are interested in visiting South Gippsland but have not yet done so.

It follows that an increased emphasis on good value accommodation may in fact lead to an increased conversion rate—turning interested consumers into actual visitors.

### Value and the new resident cohort

When asked to explain why South Gippsland is a great place to live, South Gippsland residents selected affordable housing as the key.

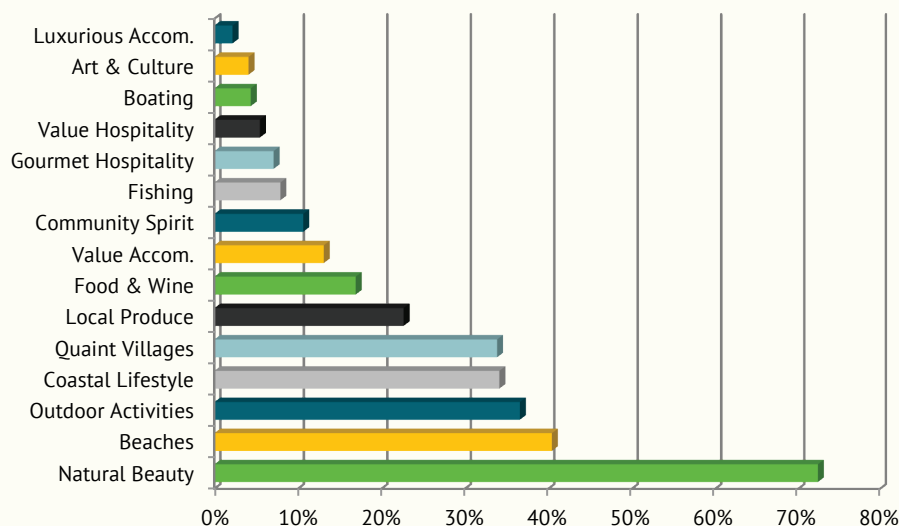
Rank	Reason given	Percentage cited
1	Affordable housing	64.3%
2	Family friendly communities	57.1%
3	Schools	50%
4	Public schools	28.6%
5	Private Schools	21.4%
6	Investment opportunities	42.9%
7	Low crime-rates	35.7%

Recognising this, the very same brand virtue—good value accommodation—may translate into perceptions of affordable housing for potential tree-changers and sea-changers just as much as it will appeal to tourists in a more *overnighter* sense.

## Quaint towns and villages



Quaint villages are a standout feature that the visitor market already sees as an emerging strength for South Gippsland.



*South Gippsland's most attractive features, as per the visitor market*

In terms of virtues that can be most easily monetised, this is a significant find: Visitation to villages and towns brings outside money into local businesses, such as cafés, restaurants, galleries and accommodation operators.<sup>78</sup>

Further, from a residential attraction and business investment point of view, casual visitation serves as a *discovery gateway* that can attract both residents and businesses to the visited village or town.<sup>79</sup>

<sup>78</sup> South Gippsland Shire Council, *Economic Development & Tourism Strategy 2015-2020*. Leongatha: November 2014. p. 9



## Outdoor activities

Outdoor activities were rated third with regard to travel priorities of South Gippsland's target market. Given the potential struggle to monetise natural beauty, this means that only *value accommodation* actually outranks *outdoor activities* in terms of a demand-side opportunity.



Asked to evaluate the most attractive features that are already present in South Gippsland (as in the chart above) the visitor market rate *outdoor activities* as third—but for this question they were only beaten by *natural beauty* and *beaches*. Given its major competition is from non-commercial features, that makes outdoor activities the stand-out monetisable feature that the visitor market sees as an attractive feature of the region.

When local businesses were polled about positive selling points that should be used to attract visitors, natural beauty was again the overwhelming winner. However, the majority of businesses also agree that *outdoor activities* are a major drawcard (53%)—the second highest ranked feature in the poll.

Despite not being the outright winner in any category, the commercial viability and consistency with which it was mentioned make outdoor activities a strong secondary priority for visibility amid South Gippsland's marketing.

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<sup>79</sup> *ibid.*

## CHAPTER 4

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### BRAND AUDIT

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A brand audit is designed to establish the breadth of the brand's assets, including how appropriate they are for meeting the brand's strategic objectives.

To evaluate the effectiveness of brand assets, Copy Transmission undertook extensive consultation with internal stakeholders as well as an independent survey of brand representations.

During the consultation period, pre-existing brand guidelines were requested from both South Gippsland Shire Council and Prom Country Regional Tourism. Neither organisation was able to show reliable and useful brand guidelines.

This section applies the brand virtues extrapolated in the previous chapter to explore the brand assets that support the brand's ongoing existence.



## Brand Names

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The current project is clearly titled the *South Gippsland Brand Review*, therefore it seems common sense that *South Gippsland* is the name that is at the core of the identity in question. This particular case, however, is not so straightforward.

While the bounds of South Gippsland are apparently clearly understood by residents of and businesses operating within the shire, tourists from Melbourne and further afield may know the area better by other names. This is particularly important given the fact that such external audiences are a primary target market for South Gippsland's branding efforts.

### Five brand names of importance

At a glance, then, the five main brand names in which South Gippsland (as an entity) has a significant investment in include:

- 1 Gippsland
- 2 Southern Gippsland
- 3 South Gippsland
- 4 Prom Country
- 5 Wilsons Prom.

Once the findings of this project are actioned, it is expected that this list should drop to four brand names of importance. The name *Southern Gippsland* may fall by the wayside.

### Gippsland

Gippsland is the largest brand name to which South Gippsland claims a significant share of ownership. The brand is fundamentally governed by Destination Gippsland.

### Southern Gippsland

*Southern Gippsland* is occasionally used to describe co-branded ventures between South Gippsland Shire Council and Bass Coast Shire Council.

A prime example of this is the *Southern Gippsland Food Map*—[www.southerngippslandfoodmap.com.au](http://www.southerngippslandfoodmap.com.au) (accessed 26 June 2016)—an online tool that helps consumers find producers of local food, fine wine and fresh produce.



*Logotype of the co-branded promotional website*

As an online promotion, it is intended to support the businesses and the broader economy in both shires.



## South Gippsland

South Gippsland is largely an internal-facing brand. As the formal name of the local government area, it is well known to its residents and to neighbouring shires.

This brand name is operationally owned by South Gippsland Shire Council.

A survey of the visitor market found low recognition of the boundaries of South Gippsland.

Asked which locations they associate with South Gippsland, the visitor market's top four responses were:

- 1 Wilsons Promontory, 79%
- 2 Phillip Island, 57%
- 3 Lakes Entrance, 51%
- 4 Gippsland Lakes, 51%
- 5 Leongatha, 45%
- 6 Venus Bay, 44%

It is important to note that the second, third and fourth ranked location features are *not* within South Gippsland boundaries. In fact, these results are akin to what we might expect from a question regarding Gippsland as a whole, with only a slight skew towards locations that genuinely within the shire.

These results indicate that the majority of the visitor market does not clearly distinguish the *South Gippsland* brand name from the rest of Victoria's regional South East.

On the basis of these findings, it seems that the South Gippsland brand name is largely inappropriate for communications that are intended to reach a visitor market.

## Prom Country

Prom Country is the outwardly facing brand for South Gippsland. It was named for a combination of Wilsons Promontory — the shire's most well known attraction — and the region's picturesque countryside. It serves as a meronymic representation of the shire for visitors and potential visitors.

Under the Prom Country brand, the shire's abundance of natural beauty is used as the flagship drawcard to attract visitation.

The brand name *Prom Country* is—in an operational sense—co-owned by Prom Country Regional Tourism and South Gippsland Shire Council. Aside from having a vested interest in the success of the brand, the Shire Council also operates the Prom Country Visitor Information Centres and contributes annual funding to Prom Country Regional Tourism.

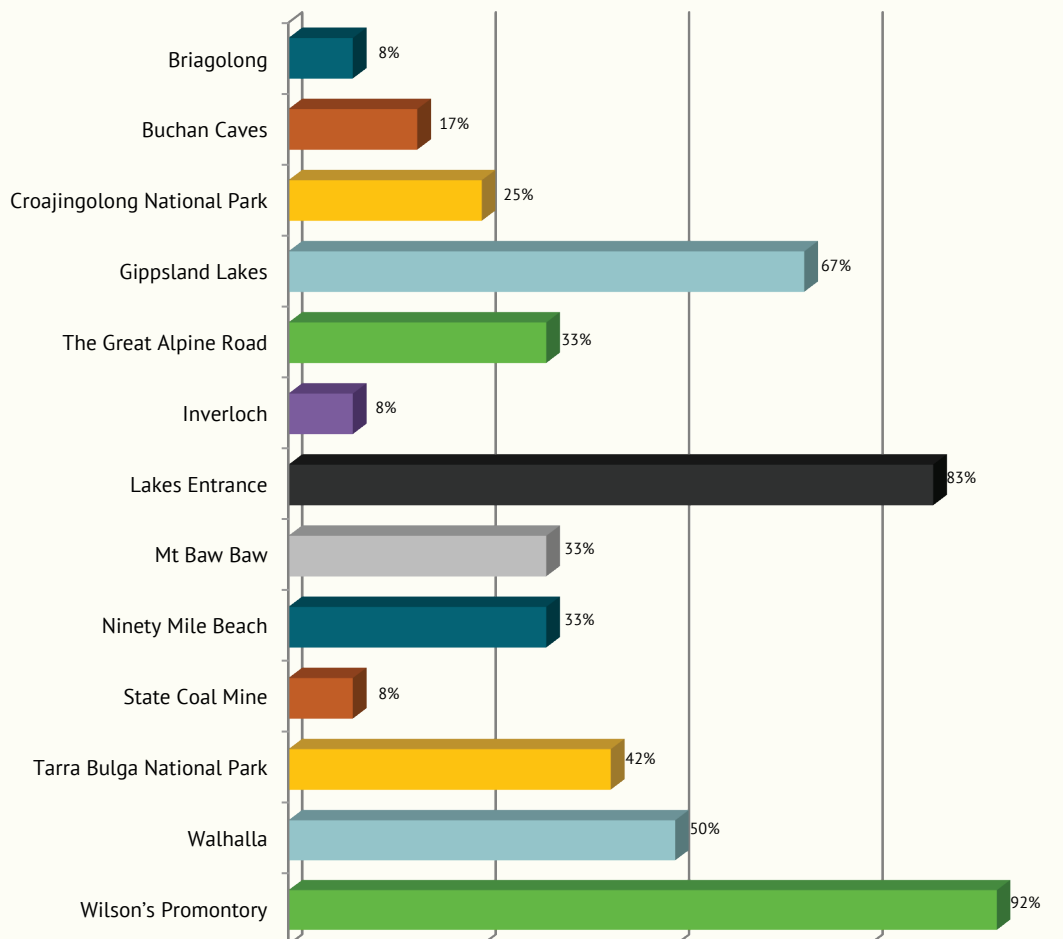
## Wilsons Prom

Wilsons Prom is a powerhouse brand in Victorian Tourism.

A 2011 study by Roy Morgan Research<sup>80</sup> asked Australians: 'Thinking about short break and holiday destinations in Victoria, what places come to mind?' Wilsons Prom was the 2<sup>nd</sup> most cited specific destination in Gippsland, only ranking behind Lakes Entrance.

Copy Transmission's 2016 survey of tourism and economic development representatives from each of Gippsland's six shires spoke even more resoundingly to the brand's strength. Asked to identify the top tourist attractions essential for the Gippsland experience, *Wilsons Promontory* led the way with a massive 92%, with *Lakes Entrance* coming in second with 83%.

### Gippsland's leading attractions



*'Identify the top tourist attractions essential for the Gippsland experience',  
as per GLGN tourism and economic development officers*

<sup>80</sup> Roy Morgan Research. *Summary of Regional Attitudes and Perceptions Study 2011 Findings: Gippsland*. Prepared for Tourism Victoria, Melbourne: 2011.

## Potential brand names issues

### South versus Southern

*Southern Gippsland* and *South Gippsland* are too semantically similar. The likelihood of confusion between the two has the potential to significantly undermine the strength of both.

South Gippsland is a distinct local government area within Victoria, defined by state-recognised borders. Generally speaking, these borders form the boundary within which attractions, towns and features are promotable as constituting the South Gippsland brand.

For an effective and coherent South Gippsland brand framework, the use of *Southern Gippsland* as part of the Tarwin Valley logotype is problematic. It makes it more difficult for consumers not already familiar South Gippsland to gain a clear understanding of *where* or *what* South Gippsland *is*. This is especially true with Tarwin Valley being one of the most prominent regional sub-brands within South Gippsland.



Implementations such as the Southern Gippsland Food Map blur the public understanding of where and what South Gippsland is.

While the term *Southern Gippsland* has been heretofore used by South Gippsland and Bass Coast Shire Councils as a shorthand name for their combined regions, this practise may hinder the effective promotion of both regions.

### Intra-shire objections to Prom-centric branding

49 South Gippsland businesses responded to a Shire-wide call for local industry operators to have their say on the region's current branding.

When asked how much they felt South Gippsland's brand should revolve around Wilsons Promontory, the findings were that local business is mildly in favour of branding that revolves mostly around the natural icon.

The result was an average score of 55%, where 0 would represent the belief that South Gippsland's branding should *not-at-all* revolve around Wilsons Prom and 100 represents the belief that the brand should be *totally focussed* on *Wilsons Prom*.

The mildness of the skew is a result of the very centrist majority of responses; both the median and modal responses were exactly in the centre of the scale. The extreme view that branding should *not-at-all* revolve around the prom was very unpopular, with only 4.1%. At the other end of the scale, a significant 10.2% of respondents advocate a brand that totally revolves around the Prom.

## Relationship to Broader Gippsland

When asked whether South Gippsland should assert itself as an independent brand or throw all its chips in with the broader Gippsland brand, businesses' opinions were extremely varied – and quite evenly spread across the spectrum.

The survey allowed them to respond by picking a point on a scale. The left side of the scale represented the opinion that South Gippsland should have a *totally distinct identity*. The right side of the scale represented the opinion that the brand should be *totally in with 'Gippsland'*. The mid-point represented a balanced compromise between the two extremes.

The average response to this question fell very close to the centre—but this is *not* purely because the centrist position was most popular. In fact, when responses are divided into quintiles, the spread is very flat and consistent. There are almost as many responses at each of the extremes as there are in the centre.

## Potential stakeholder issues with relationship to Gippsland

This very flat distribution of responses signifies a potential issue for stakeholder satisfaction in relation to South Gippsland's branding. With almost as many businesses exhibiting strong beliefs on either side, there is the potential for discontent regardless of the course of action taken.

Any moves towards deeper buy-in to a unified Gippsland would meet with resistance from the 20.4% of businesses that advocate a more independent South Gippsland brand.

On the flip-side, attempts to fully extricate South Gippsland from the Gippsland brand may be resented by the 18.4% of businesses that believe Prom Country should be all-in with the broader Gippsland brand.

While no specific course of action can be recommended on the basis of these results alone, this is certainly a result that must be heeded: regardless of the strategy that is to be pursued, an effective communications strategy must be enacted to clearly and convincingly explain the reasoning to businesses with a vested interest.

## Potential for pushback from community-led groups

While it is certainly not expected, there is the potential for one or more of the above-listed community-led groups to be unsatisfied with a master-brand/sub-brand alignment that places South Gippsland/Prom Country at its centre. Non-conformance from these groups has the potential to undermine efforts at shire-wide cohesion.

One sub-brand that deserves specific attention is Tarwin Valley, which appears further along in the process of developing its brand than the other regions. At the time of review, it is evident that Tarwin Valley's branding positions it in the context of **Southern** Gippsland.

Appearing on the Tarwin Valley website, this is notable primarily because it eschews the Prom Country brand despite the Tarwin Valley region's proximity qualifying it as a genuine gateway to the Prom itself.

While there are not yet established guidelines nor formal relationships between the master brand and the sub-brands, steps should be taken to address this matter. Indeed, suggested steps towards this end can be found in this report's recommendations sections.

## Visual Identity

Much like the brand names associated with South Gippsland, the visual identity is also split into internal and external facing brands—associated, of course, with the internal and external facing brand names.



*South Gippsland Shire Council logo & Prom Country Regional Tourism logo, both with brand words removed*

The logo for the South Gippsland Shire Council is essentially the internally facing visual identity for the brand. The Prom Country Regional Tourism logo is the visual identity most often used to represent the region to external audiences.

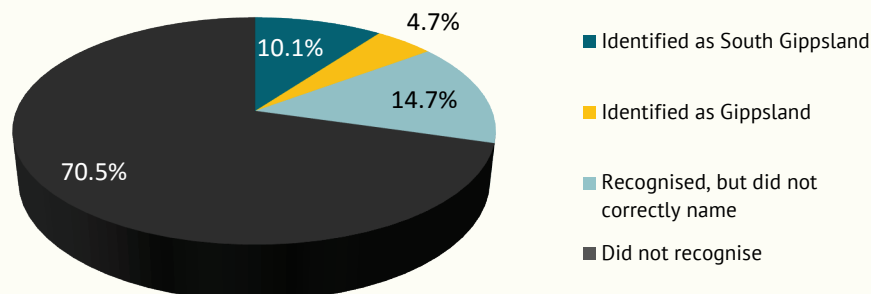
## Visitor market perceptions

Neither the PCRT logo nor the South Gippsland Shire Council logo had high recognition with the South Gippsland's visitor market. Overall, the PCRT logo fared mildly better.

18.6% of respondents either correctly identified the PCRT logo or suggested that it represented an aspect of Gippsland. By the same generous measure, South Gippsland Shire logo only got 14.8%.

### Recognition and correct identification of the SGSC logo

South Gippsland Shire Council's logo sparked a sense of recognition in 29.5% of the visitor market, but was correctly connected to South Gippsland by only 10.1% of respondents.



*Visitor market recognition of the South Gippsland Shire logo*

If the scope of identification is broadened to accept any and all indicators of Gippsland, then this figure increases to 14.8%.

## Incorrect identification of the SGSC logo

Misapprehensions about the region that the Shire logo represents were significant. 5.2% of respondents believed it to represent Lakes Entrance or the Lakes Region. A further 1.7% errantly named it as some other coastal Victorian district.

In total, 6.9% of respondents errantly thought they knew which region the logo represented, but they got it wrong. Considered alongside the 10.1% that got it right, this is a rather significant proportion.

More than just a lack of identification, such *incorrect identification* is indicative of a visual indistinctness. In this case, it is not so much a matter of South Gippsland Shire's logo being too similar to other logos, but rather it lacks distinguishing features that would serve as memory-cues to the audience. Because of this, audiences may readily fail to make the proper association between the logo and the region that they are intended to represent. This, of course, is a significant issue for the South Gippsland Shire brand.

## Visual Connotations of the SGSC logo

Respondents who *did not* recognise the South Gippsland Shire logo are considered to be the best source of information regarding the first impressions and connotations of the visual identity. This is because those people are yet to form attach any additional relevance to it.

Of the cohort that did *not* recognise the South Gippsland Shire logo, observations about the logo tended to be nature based, including statements like:

- 'Boating'
- 'Sailing'
- 'Lighthouse'

These statements do not broadly reflect South Gippsland's brand virtues.<sup>81</sup> Therefore, these associations are considered *off brand*.

5.2% of respondents expressed these off-brand connotations of the logo.

These connotations of the logo could be a significant branding issue for the Shire.

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<sup>81</sup> *Brand virtues* here refers to the virtues as determined earlier in this project, in lieu of any prescriptive criteria that would be contained in a formalised set of brand guidelines.

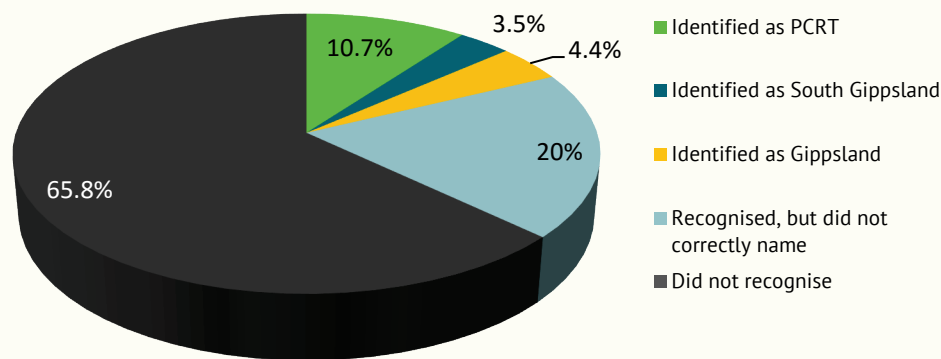
## Conclusions about the SGSC logo

In total, 10.1% of respondents correctly identified the South Gippsland Shire logo. 6.9% of respondents believed it represented a competitor. 5.2% of respondents believed the logo represented values and/or features that are *not* on brand for South Gippsland. Taken together, a total of 12.1% of respondents had a categorically incorrect or off-brand understanding of the logo. The fact this exceeds the percentage that correctly identified the logo is indicative of an issue with the visual representation.

## Visitor market recognition of the PCRT logo

PCRT's logo sparked a sense of recognition in 34.2% of the visitor market, but was correctly identified by only 10.7% of respondents.

**PCRT logo responses**



If the scope of identification is broadened to accept indicators of South Gippsland, then this figure increases to 14.2%.

## Visual connotations

Of the cohort that did *not* recognise the PCRT logo, observations about the logo tended to be nature based, including statements like:

- 'Earth Wind and Sea'
- 'Land and sea'
- 'Free spirit'
- 'Wild'
- 'Nature'
- 'Not sure but its lovely' [sic.]
- 'Soaring to great heights!'
- 'Hills and sea'
- 'Fly free'

These connotations are broadly in line with the values that should underpin the South Gippsland brand as it is projected outwardly, to tourists.



## Perspectives from within the shire

### Residents Perspective

When South Gippsland residents were asked to pick which logo they thought best represents South Gippsland, the existing logo for the Shire of South Gippsland was a clear winner.

Rank	Logo	Score
1	SGSC	100
2	North Grampians	88
3	PCRT	85
6	East Gippsland	38
5	Hamamatsu	29
4	Harcourt Valley	16
7	Gippsland Lakes Community Health	10

*Processed results of shire resident survey question:  
which (unlabelled) logo best represents South Gippsland*

The format of the question allowed respondents to pick their first, second and third favourites for representing South Gippsland. Possible selections included current logos for the Shire of South Gippsland and Prom Country Regional Tourism as well as five comparable logos included for deeper comparisons. All logos were stripped of logotype that would make them easily identified, therefore emphasising the visual appeal of each one.

Each vote was then attributed a weighting (3 points for first preferences, 2 points for second preferences, 1 point for third preferences). The final score attained by each logo is equal to the sum of all points it received from all respondents.

Interestingly, the logo for Prom Country Regional Tourism did not come in second, but rather a close third. Scoring 85, PCRT's logo came in just behind that of the *North Grampians Shire Council* which scored 88.

### New residents

When the cohort considered in the analysis is limited to only those residents who have moved to the region within the last five year, a different picture emerges.

Rank	Logo	Score
1	North Grampians	25
2	PCRT	17
3	East Gippsland	16
4	South Gippsland Shire Council	15
5	Hamamatsu	6
6	Harcourt Valley	3
7	Gippsland Lakes Community Health	2

The existing shire logo did not fare so well with respondents classified as *newer residents*. In fact, when only the new resident cohort is used in calculations, the Shire logo falls to fourth place, behind firm favourite *North Grampians*, as well as PCRT and even the logo for East Gippsland.

Copy Transmission proposes three explanations of this differentiation of the opinions of new residents.

It may be that new residents:

- are less likely to have pre-existing perceptions of the brands that the logos represent (i.e. this implies that the scores of the all resident preferred logo have been skewed by a predisposition for/against the organisations the logos represent)
- have a different understanding of South Gippsland's essence
- have different aesthetic preferences.

Of these three possibilities, Copy Transmission concludes that the first one is the most likely. This is supported by two main factors:

- A similar understanding of Gippsland's essence was proved by the responses to other questions, including highlighting characteristics such as being *welcoming*, *relaxing*, *natural* and *accessible*<sup>82</sup>—as well as easy access to Melbourne, supportive communities and picturesque surroundings.
- The relative shape of the curve across the less popular options for preferred logo is much the same, indicating a reasonably similar aesthetic preference.

## Local Business Perspective

When local businesses were asked to pick which logo they thought best represents South Gippsland, the surprise winner was the logo of the North Grampians Shire Council, with a score of 89.

Rank	Logo	Score
1	North Grampians	89
2	SGSC	81
3	PCRT	60
4	Harcourt Valley	23
5	Hamamatsu	15
6	East Gippsland	14
7	Gippsland Lakes Community Health	12

*Processed results of local business survey question:  
which (unlabelled) logo best represents South Gippsland*

While businesses voted the Grampians logo outright winner with 89, the existing South Gippsland Shire Council logo was a clear second, with a score of 81. The Prom Country Regional Tourism logo was third with a score of 60.

<sup>82</sup> Responses from new residents also sought to highlight that South Gippsland is *unexpected*, *idyllic* and *unpretentious*—we may speculate that this is a result of directly comparing the experience of living in South Gippsland to that of living in Melbourne.

## Potential visual identity issues

### New residents may feel that the Shire logo is not ideally representative

New residents' expressed preference for three logos other than the Shire logo goes some way to supporting observations made in relation to the visitor survey. In the visitor survey, which polled past, current and potential visitors, it was evident that the purely visual connotations of the Shire logo were not *on brand* with the aspects of the region that ought to be promoted.



*3 logos new residents think represent South Gippsland better than the current shire logo*

This is at odds with the logo preferences of longer-term shire residents, who largely rated the current logo as best. The difference may be due to longer-term residents greater knowledge of local organisations and their history, rendering them more inclined to attach other (non-visual) preconceptions to their evaluation of the logos.

It bears mentioning that the sample size for the new resident cohort was small, therefore additional research may be warranted to verify these conclusions.

### The North Gippsland logo conundrum

It is genuinely surprising to see how a significant portion of each surveyed group believe that the North Grampians logo is more representative of their region than either of the current iterations of its visual identity.



The North Grampians Shire Council logo was surprisingly popular for newer residents and with the local business community.

Obviously, this logo is not a candidate for South Gippsland in that it is already in use having been specifically designed for a different shire. Nevertheless, the result is significant: what does its relative popularity indicate for the current South Gippsland visual identity?

While deeper investigation into this phenomenon is beyond the scope of this project, the North Grampians logo used in Copy Transmission's surveys should be well noted by South Gippsland's destination marketing agencies.

If and when renewal of the visual identity becomes a realistic prospect for South Gippsland, the tenets of style and simplicity that underlie the North Grampians logo should be closely studied.

## Social Media :: Top-level stakeholders

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The three most prominent South Gippsland brand stakeholders are PCRT, South Gippsland Shire Council and Destination Gippsland.

The respective social media representations of these the stakeholders play an important role in the online reputation management of the South Gippsland brand. For this reason, it is important to consider the current activities and the platforms used as well as their successes that can be leveraged.

All figures listed are correct as of 26 June 2016.

### Prom Country Regional Tourism

Prom Country Regional Tourism is consistently active on Facebook. They maintain both a consumer-facing page, and an industry-facing page.

PCRT also maintains a consumer-facing Twitter account, but this appears much less active.

#### Facebook:

Account type	Account Name	Likes
Consumer-facing	<a href="#">Prom Country (South Gippsland)</a>	899
Industry-facing	<a href="#">Prom Country Regional Tourism Inc</a>	259

#### Twitter:

Account type	Account handle	Followers
Public	<a href="#">@promcountry</a>	518

While PCRT maintains an active presence on Facebook, a survey of Twitter activity suggests little regular activity. Given Prom Country's abundance of natural beauty being considered the brand's flagship virtue, Instagram seems an ideal platform for on-brand social content. Further, Instagram's seamless integration with Facebook (Facebook is Instagram's parent company) means that photo and video related content shared via Instagram can also leverage PCRT's healthy Facebook following.

PCRT should consider getting active on Instagram, perhaps at the expense of their relatively inactive Twitter account.

## Destination Gippsland

Of the three top-line stakeholder brands, Destination Gippsland is by far the most active and boasts the widest audience. In particular they have active community engagement across Facebook, Instagram and Twitter. In fact, these three accounts are the top three, in terms of followers, out of all the social media accounts profiled.

In addition to these standout accounts, Destination Gippsland is also active, albeit to a lesser degree, on LinkedIn and YouTube.

### Facebook

Account type	Account Name	Likes
Consumer-facing	<a href="#">@Gippsland</a>	21,467
Industry-facing	<a href="#">@DestinationGippslandIndustry</a>	1,005

Like PCRT, Destination Gippsland maintains both a consumer-facing Facebook page and an industry-facing Facebook page.

Their consumer-facing page is the standout social media account for the Gippsland region with more than 20,000 followers.

### Instagram

Account type	Account handle	Followers
Public	<a href="#">@visitgippsland</a>	8,622

Destination Gippsland's Instagram account is the second most followed social media presence in Gippsland destination branding with more than 8,000 followers.<sup>83</sup>

### Twitter

Account type	Account handle	Followers
Public	<a href="#">@visitgippsland</a>	2,540

Twitter also features highly, with more than 2,500 followers.

### LinkedIn

Account type	Account Name	Followers
Company	<a href="#">Destination Gippsland</a>	153

Destination Gippsland's LinkedIn activity is sporadic by comparison to the aforementioned accounts. At the time of review, the most recent post was 2 months old. On average, they seem to post about once every month.

### YouTube:

Account type	Channel	Subscribers
Public	<a href="#">Destination Gippsland</a>	3

Destination Gippsland's YouTube account is dormant. The most recent video was posted 10 months ago.

<sup>83</sup> East Gippsland's Facebook page, @LoveEastGippsland, isn't too far off with 7,227 likes.

## South Gippsland Shire Council

South Gippsland Shire Council is active on Facebook and also lists a YouTube channel.

### Facebook:

Account type	Account Name	Likes
Consumer-facing	<a href="#">@SouthGippslandShireCouncil</a>	1,763

### YouTube

Account type	Channel	Subscribers
Public	<a href="#">South Gippsland Shire Council</a>	28

While South Gippsland Shire Council's Facebook activity is consistent and frequent, the YouTube channel appears dormant. The last video uploaded was 2 years ago.

## Takeaways

As the peak tourism body for the Gippsland region, it's perhaps not surprising that Destination Gippsland should have the most widely reaching social media communities out of the three top-line South Gippsland stakeholders.

However, there are a number of takeaways of note. For one, Destination Gippsland makes enormous use of Instagram, both as a platform in its own right, but also as a content generator for Facebook. In fact, the majority of their Destination Gippsland Facebook content is shared directly from their Instagram account.

This seems a natural strategy – Instagram is all about visual content, and the wider Gippsland (and South Gippsland) brands are heavily centred on things that are visually beautiful – gorgeous vistas and natural attractions.

## Hashtags

Destination Gippsland consistently uses two key hashtags to promote their content:

- #inspiredbygippsland
- #visitgippsland

In addition, brand-appropriate content that other users share which also make use of the wider Gippsland call-to-action hashtags are frequently shared by Destination Gippsland via their channels. In fact, they actively call for users to take advantage of this promotional method.

Finally, and most significantly for the South Gippsland brand, Destination Gippsland frequently also uses other regional hashtags where appropriate (for example #visitbawbaw, #loveeastgippsland) in addition to their own call-to-action tags.

## PCRT and Instagram

Should PCRT becomes active on Instagram, South Gippsland will be able to leverage Destination Gippsland's considerable reach by also making use of the regional hashtags (#inspiredbygippsland, #visitgippsland) in conjunction with their own local call-to-action hashtags (for example: #visitpromcountry).

Given the ease with which this content can also be shared to Facebook, such content can be targeted both to Prom County's current visitors (who are mostly active on Facebook), as well as expanding their reach to potential untapped visitors via Instagram itself.

Further, taking an active approach to promoting both the wider Gippsland calls-to-action hashtags as well as South Gippsland-specific call-to-action hashtags will strengthen strategic ties with Destination Gippsland. Apart from reaching a ready-made, engaged audience, it will engender greater reciprocity in cross-promotion between PCRT and Destination Gippsland, benefitting all involved.

## Sub-brands

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In the destination branding network, PCRT reports upwards to Destination Gippsland, just as community-led groups feed upwards to PCRT.

There are eight acknowledged community-led groups that are active and important to South Gippsland's branding. Each one claims the prerogative to represent a sub-regional brand:

- Fish Creek
- Foster
- Korumburra
- Leongatha
- Loch
- Meeniyan
- Mirboo North
- Tarwin Valley.

Each of these may be regarded as a sub-brand of the Prom Country identity. Responsibility for expressing those brands currently rests with the community-led groups that are intrinsically related.

### Sub-brand profiles

South Gippsland is also an umbrella under which a number of smaller, grass-roots movements can establish their own footing. Structured effectively, the branding espoused by these community-led groups will engage in a reciprocal relationship with that espoused by South Gippsland. The groups will receive the benefits of guidance, centralised leadership and the potential for resource sharing. The central brand can benefit from information sharing, direct industry liaison and the constituent engagement that such makes community-led groups so valuable.

#### Fish Creek

**Community Website:** <http://fishcreek.vic.au>

Under the purview of the *Fish Creek Development Group*, Fish Creek's own website (accessed 26 June 2016) describes the area as:

...a charming, arty rural village (pop. 201) in South Gippsland nestled within a verdant dairy farming area.

Best known, perhaps, for its fabulous art deco hotel, Fish Creek is a delightful watering hole for visitors to nearby Wilson's Promontory and Waratah Bay. The town has two popular cafes, Flying Cow and KO Bar and Grill. It also has a coffee bar/food store/bookshop, 9acres, as well as a general store and a number of shops and galleries.

#### Fish Creek Development Group

No online presence, information nor logo was available at the time of writing.

Fish Creek does not appear to maintain any social media accounts.



## Foster

**Visit Victoria Website:** [Foster](#)

**Community Website:** [www.foster.vic.au](http://www.foster.vic.au)



Currently under the purview of the *Foster Chamber of Commerce*, Foster's community

website (accessed 26 June 2016) describes itself as 'Victoria's Secret':

Foster township is located at the very heart of *Prom Country*, just two hours SE of Melbourne and 30 minutes from the gate of the magnificent Wilsons Promontory National Park. As the main shopping centre in the area, Foster is a short drive from other popular attractions, including Shallow Inlet, Corner Inlet, the spectacular beaches of Sandy Point and Waratah Bay and Victoria's highest waterfall, Agnes Falls.

### Foster Chamber of Commerce

The same website describes the Foster Chamber of Commerce as:

...actively involved in promoting all that Foster has to offer and the great businesses within it. We are passionate to build our individual businesses and are interested in what any new members have to say, working together to ensure the success of our great town.

### Social Media: Facebook

Account type	Account Name	Likes
Industry Facing	<a href="#">Foster Chamber of Commerce</a>	178

## Korumburra

Visit Victoria Website: [Korumburra](#)

Currently under the purview of the *Korumburra Business Association*, Korumburra is described in the brochure *Korumburra: Live. Work. Invest* (South Gippsland Shire Council, 2011) as:

...a charming township set amongst the rolling green hillsides of South Gippsland. Located just a 90 minute drive from Melbourne, this friendly country township is a long way from the hustle and bustle of suburban life, but is accessible enough to make daily commuting to the suburbs an easy possibility. Korumburra is situated close to many iconic attractions, including Wilsons Promontory National Park, Mount Worth State Park and the much-loved swimming beaches of Inverloch, Waratah Bay and Sandy Point. With a population of over 3200, Korumburra is big enough to supply most service needs, but is still small enough to retain a relaxed, country lifestyle. Korumburra is second only to Leongatha as the largest urban settlement in the South Gippsland Shire. The towns are located just a short fifteen minute drive apart.



Despite being written before the eight brand virtues were drafted, these passages manage to touch upon most of them.

### Korumburra Business Association

The Korumburra Business Association's Facebook page (accessed 26 June 2016) describes it as:

...an organisation where passionate, active business owners work to create lasting change in the Korumburra community. We are a dedicated group who feel that an involved and connected Business Association is the best way to nurture and assist our small country community through any challenges that may arise.

### Social media: Facebook

Korumburra has two active Facebook channels, one is industry-facing page and the other is a community-facing group.

Account type	Account Name	Likes
Consumer-facing	<a href="#">Korumburra Community Noticeboard</a>	1,177 Members
Industry-facing	<a href="#">Korumburra Business Association</a>	374

Both Korumburra Facebook channels display a consistently high level of activity.

## Leongatha

### Visit Victoria Website: [Leongatha](#)

Currently under the purview of the *Leongatha Chamber of Commerce and Industry*, Leongatha is located in the foothills of South Gippsland's Strzelecki ranges.

By way of description, the Visit Victoria website (accessed 26 June 2016) invites visitors to:

Take a trip to this prime dairy district, home to the largest co-operative dairy in the southern hemisphere. Originally settled on cleared forests of the western Strzeleckis, Leongatha and the surrounding countryside were dotted with rich dairy farms from the 1870s onwards. The opening of the South Gippsland Railway in 1892 boosted development as more forests were cleared to make way for cattle grazing.

Experience a wide range of cultural events and festivals at Leongatha throughout the year. The town also boasts numerous shops, galleries and museums devoted to the local arts and crafts of the region.

Around Leongatha, discover numerous tracks and trails that offer relaxing walks through its undulating and captivating scenery.

### Leongatha Chamber of Commerce & Industry

On their own Facebook page (accessed 26 June 2016), the Leongatha Chamber of Commerce & Industry describe themselves as:

...designed to help promote business in Leongatha.

LCCI is a committee of Leongatha business people, helping to make our town a greater place to come and shop.

No logo or public information was available for this organization.

### Social media: Facebook

Leongatha's Chamber of Commerce and Industry maintains a Facebook page.

Account type	Account Name	Likes
Industry-facing	<a href="#">Leongatha Chamber of Commerce &amp; Industry Inc</a>	36

Despite the small number of followers, the LCCI Facebook page boasts relatively consistent activity.

## Loch

**Community website:** [www.lochvillage.com](http://www.lochvillage.com)



Currently under the purview of the *Loch Community Development Association*, Loch is home to a number of boutiques, galleries and antique shops. Other standout attractions include Loch Brewery & Distillery, the Gippsland Wine Company and Olive at Loch.

The Loch Village Facebook page (accessed 26 June 2016) describes the town as:

Just over an hour's drive from Melbourne, the quaint village of Loch is situated in the South Gippsland region of Victoria, Australia.

Notably, this hits one inherent virtue (accessibility) and one monetisable (quaint villages) virtues all within the space of a single sentence.

### Loch Community Development Association

The Loch Community Development Association profile on [www.visitpromcountry.com.au](http://www.visitpromcountry.com.au) (accessed 26 June 2016) described the organisation as:

... formed in 1998. Its purpose is to develop long-term beneficial strategies that have the potential to deliver improved facilities to members of the Loch community and visitors to Loch Village. LCDA may be used as a forum for ideas and proposals as put by individuals, groups or businesses in the Loch community. LCDA will represent the Loch community's needs to all appropriate levels of government and other community-based organisations. The LCDA AGM is conducted in August.

### Social media: Facebook

Account type	Account Name	Likes
Consumer-facing	<a href="#">Loch Village</a>	306

The Loch maintains a community Facebook page which boasts consistently high levels of activity.

## Meeniyian

**Community website:** <http://www.meeniyian.org.au>

Currently under the purview of the *Meeniyian Tourism & Traders Association*, Meeniyian's community website (accessed 26 June 2016) describes the area as:

Situated on the South Gippsland Highway, Meeniyian is a picturesque country township and is the turning point to Wilson's Promontory and Latrobe Valley.



Meeniyian is also the popular home of the *Lyrebird Arts Council*, renowned for hosting major Australian and international musical performers.

### Meeniyian Tourism & Traders Association

No online or public information was found for this association.

### Social media: Facebook

Account type	Account Name	Likes
Consumer-facing	<a href="#">Meeniyian</a>	240

Despite Meeniyian community Facebook page having a subscribed audience of 240, the page appears to be inactive.

## Mirboo North

**Visit Melbourne Website:** [Mirboo North](#)



Currently under the purview of *Mirboo Country Development Inc.*, Mirboo North is described on the Visit Victoria website (accessed 26 June 2016) as:

Mirboo North marks the halfway point on the magnificent Grand Ridge Road in Central Gippsland. Looking down from its high ridge, this traditional country town is surrounded by some of the most scenic views in the area.

Mirboo North is the location of Destination Gippsland Ltd offices. It is also renowned as the home of the award-winning Grand Ridge Brewery.

### Mirboo Country Development Inc.

The *Mirboo North Country* Profile on [www.visitpromcountry.com.au](http://www.visitpromcountry.com.au) (accessed 26 June 2016) describes the organisation as:

...a community association dedicated to making Mirboo North a great place to live, work and visit. We are a cohesive and welcoming group of people that coordinate events and activities.

Mirboo Country Development is undertaking a pilot website development project in partnership with Prom Country Regional Tourism.

The aims are to create a Mirboo North sub-brand website that slots into the PCRT-branded online framework in a way that is aesthetically and structurally consistent.

### Social Media: Facebook

Account type	Account Name	Likes
Consumer-facing	<a href="#">Mirboo Country Development</a>	148

Mirboo Country Development Inc. maintains a community Facebook page which boasts consistently high levels of activity

## Tarwin Valley

Currently under the purview of the *Tarwin Valley Development Group*, Tarwin Valley is a cluster of townships.

The Tarwin Valley Development Group's website (accessed 26 June 2016) describes the area as:

Nestled in the rolling green hills of Southern Gippsland is a valley sprinkled with small vibrant townships, each a little different in what they have to offer, but all identical in the manner in which they offer. Every town sharing a sense of country hospitality that the world had forgotten existed.



### Tarwin Valley Development Group

**Website:** [www.tarwinvalley.com.au](http://www.tarwinvalley.com.au)

Tarwin Valley Development Group is a partner to Warratah Hills Vineyard, on whose website (<http://waratahhills.com.au/partners>, accessed 26 June 2016) it is described as an economic and social driver for the region:

As regional areas throughout Australia become more competitive for investment, talent, tourism and other drivers of economic growth, *The Tarwin Valley Development Group* is an important driver in helping shape the economic and social fabric of our beautiful region.

The Tarwin Valley group has been effective at securing government grant money to fund brand asset development and to make a start at establishing an online presence.

At the time of review, things look to be still in process but there is a good deal of potential on show.

### Social Media: Facebook

Account type	Account Name	Likes
Consumer-facing	<a href="https://www.facebook.com/tarwinvalley">@tarwinvalley</a>	230

Tarwin Valley's Facebook page boasts consistently high levels of activity.

### Social Media: Other

While there are associated Twitter, YouTube and Google+ accounts, they each exhibit little or no activity.

Account type	Account handle	Followers
Twitter	<a href="#">@tarwinvalley</a>	16

The Twitter account features just two posts, however the latest was relatively recent after a long period of inactivity indicating that it may not be completely inactive.

Account type	Channel	Subscribers
YouTube	<a href="#">Tarwin Valley</a>	0

In the case of YouTube and Google+, these accounts appear to have had no activity of any kind beyond their initial registration. They may have been secured with plans for future use.

Account type	Account Name	Followers
Google+	<a href="#">Tarwin Valley</a>	0

## Sub-brand trends and challenges

With numerous different organisations managing many different sub-brands—each of which should be integrated with the Prom Country brand—fragmentation is a serious challenge for South Gippsland.

For a brand to succeed, it must be an authentic representation. All representations must be consistent and coherent. All components must align with a predetermined culture and a set of values—they should promote the same virtues.

Such authenticity requires stakeholders to have a shared understanding and commitment to the brand that unifies them. Brand representations that exhibit characteristics that are inconsistent fragment the brand and erode its cachet.

To date, these sub-brands have not been compelled to follow the Prom Country branding, yet some of them have done quite well. Perhaps intuitively, they have leveraged the strength of the *Prom Country* umbrella brand whilst serving to boost its profile in return.

The community geographic domain for Foster —[www.foster.vic.au](http://www.foster.vic.au)—includes passages of text that reflect the Prom Country ethos very well.

As expected in the absence of brand guidelines and with little or no liaison on the matter of branding, not all implementations have been so well aligned.

As a case in point, the independent development of a sub-regional brand for Tarwin Valley is—though in other ways laudable—not well integrated with the Prom Country brand. Perhaps the most troubling issue is that Tarwin Valley has chosen to align its brand to the *Southern Gippsland* name—which has itself been identified as a risk to the South Gippsland brand.





## CHAPTER 5

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### COMPETITORS

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In taking stock of *competitors* to the brand, we must be sure we are clear about the meaning of competition. Here, we mean to identify current and potential organisations and brands that may in any way diminish the *current* South Gippsland brand. Of course, we must first be very clear about that which we are identifying as core to the brand.

Given that *Prom Country* is currently the primary tourist-facing representation of the South Gippsland Region, this sections also identifies competitors in terms of risks to the Prom Country brand.<sup>84</sup>

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<sup>84</sup> This section presumes that *South Gippsland Shire Council* (including elected representatives and the supporting administration) and *PCRT* (as the responsible LTA) are the core representatives of the *South Gippsland* and *Prom Country* brands. Evaluation of the brand is covered in Chapter 4: Brand Audit.



# Destination Competition

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## The Great Ocean Road

<b>Competitive grounds:</b>	<b>Popular nature-based tourism destination within Victoria</b>
<b>Representative Body:</b>	<b>Great Ocean Road Regional Tourism Ltd.</b>
<b>Website (Public-facing):</b>	<a href="http://www.visitgreatoceanroad.org.au">www.visitgreatoceanroad.org.au</a>
<b>Website (Industry):</b>	<a href="http://greatoceanroadtourism.org.au">greatoceanroadtourism.org.au</a>

As reported in *Victoria Regional Tourism Strategy 2013-2016* (State Government of Victoria, 2013):

Tourism contributed \$1.83 billion to the Great Ocean Road economy in 2011-12 (11.1 per cent of gross regional product) and employed 20,000 people (11.6 per cent of regional employment). ... the Great Ocean Road supplies the second highest contribution to Victoria's tourism gross regional product, ranking only behind Melbourne. Future major opportunities for tourism development in the Great Ocean Road region are to:

- Support investment in attractions and product that increases overnight visitation; and
- Continue to build on the supply of high quality accommodation developments.
- Leverage the commitment of \$50 million (jointly funded by State and Federal Governments) to upgrade and maintain the Great Ocean Road.

On the *preference to visit* measure, Great Ocean Road scores 12.9%, which is significantly higher than greater Gippsland (7.2%).<sup>85</sup>

## Proactive Administration—The Strategic Master Plan

Of the key issues that Great Ocean Road Regional Tourism Ltd identified for their region, many resonate with the South Gippsland experience, including:

- community understanding the value of the visitor economy
- ensure long-term sustainability of the regional funding model
- collaboration between operators within a destination and whole of region
- balancing the desire for lifestyle businesses with visitor needs and expectations, e.g. regular operating hours and year-round availability.<sup>86</sup>

To tackle them, Great Ocean Road Regional Tourism Ltd recently completed a lengthy consultation and planning process. The resulting *Strategic Masterplan* will guide the region's visitor economy development over the next decade.

The Master Plan was funded by Great Ocean Road Regional Tourism with support from Regional Development Victoria and Tourism Victoria.<sup>87</sup> It is recommended reading for all interested in this report.

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<sup>85</sup> Data Insights. *Travel to the Greater Gippsland Region: Year ended December 2015—Quarterly tracking of selected measures*, prepared for Destination Gippsland Ltd. March 2016. p.43.

<sup>86</sup> Great Ocean Road Regional Tourism Ltd, *Strategic Master Plan for the Great Ocean Road Region Visitor Economy 2015-2025*. Apollo Bay: September 2015. p.67.

## The Grampians

<b>Competitive grounds:</b>	<b>Popular nature-based tourism destination within Victoria</b>
<b>Representative Body:</b>	<b>Grampians Tourism</b>
<b>Website (Consumer):</b>	<a href="http://www.visitgrampians.com.au">www.visitgrampians.com.au</a>
<b>Website (Industry):</b>	<a href="http://grampianstourism.com.au">grampianstourism.com.au</a>

As reported on page 32 of *Victoria Regional Tourism Strategy 2013-2016* (State Government of Victoria, 2013):

Tourism contributed \$949 million to the Grampians economy (22.2 per cent of gross regional product) and employed 8,300 people (18.1 per cent of regional employment) in 2011-12. It is estimated that tourism directly represented 3.2 per cent of the total regional economy, below the average of 4.5 percent for regional Victoria.

The report also identified a key future opportunity for the Grampians: 'increasing the supply of high quality tourism product and infrastructure that enhance and leverage existing nature-based experiences.'

Grampians has a lower *preference to visit* level (4.3%) than greater Gippsland (7.2%).<sup>88</sup>

## Phillip Island

<b>Competitive grounds:</b>	<b>Popular nature-based tourism destination within Gippsland</b>
<b>Representative Body:</b>	<b>Destination Phillip Island</b>
<b>Website (Consumer):</b>	<a href="http://www.visitphillipisland.com.au">www.visitphillipisland.com.au</a>
<b>Website (Industry):</b>	<a href="http://www.destinationphillipisland.org.au">www.destinationphillipisland.org.au</a>

### Contribution of tourism to the regional economy

As reported on page 36 of *Victoria Regional Tourism Strategy 2013-2016* (State Government of Victoria, 2013):

The tourism industry contributed \$619 million to the Phillip Island economy (39 per cent of gross regional product) and employed approximately 5,000 people (33.5 per cent of regional employment) in 2011-12. It is estimated that tourism directly represented 12.2 per cent of the total Phillip Island economy, well above the regional Victoria average of 4.5 per cent. Phillip Island ranked first in the comparative importance of tourism across regions.

Future major opportunities for tourism development in the Phillip Island region are to:

- Encourage increased overnight visitation through diversification of the tourism accommodation offering; and
- Continue focus on enhancing access to the region.

<sup>87</sup> ibid. p.2.

<sup>88</sup> Data Insights. *Travel to the Greater Gippsland Region: Year ended December 2015—Quarterly tracking of selected measures*, prepared for Destination Gippsland Ltd. March 2016. p.43.

## Visitation (Year Ending Dec. 2015)

As reported by Data Insights in the *Travel to the Greater Gippsland Region* (2016), Phillip Island received 548,000 overnight visitors in 2015 (p.18).

Domestic visitors stayed for nearly 1.4 million nights (p.20). For the same period, Phillip Island hosted 736,000 day-trippers (p.39).

Also during 2015, Phillip Island received 40,200 international visitors (p.29).

## Synergy with South Gippsland

Despite meeting the definition of a competing nature-based tourism destination, there is the possibility for Phillip Island to be promoted in collaboration with features in South Gippsland. Phillip Island's proximity means that there is significant potential that each destination may leverage the others successes.

In fact, it is not uncommon for Phillip Island and South Gippsland to feature as part of the same promotions (for example, Destination Gippsland-produced caravan and camping guides, rides brochures and touring maps).

This synergy is borne out with statistics: Data Insights (2016), report that around 14,000 of the domestic visitors to visited Phillip Island in 2015 also visited some part of the greater Gippsland region (p.18). Further, around 11,900 international visitors to Phillip Island in 2015 also visited some part of the greater Gippsland region (p.129).

## Proactive: The Phillip Island and San Remo Tourism Strategy 2035

Like Great Ocean Road Regional Tourism, Bass Coast Shire Council is developing a long-term tourism strategy for Phillip Island and San Remo. They are doing so in partnership with *Regional Development Victoria*, *Destination Phillip Island* and *Phillip Island Nature Parks*.

The strategy is currently in development, with feedback and submissions having closed on 27 May 2016. According to the online hub for the project, [www.basscoast.vic.gov.au/Business/Phillip\\_Island\\_Tourism\\_Strategy\\_2035](http://www.basscoast.vic.gov.au/Business/Phillip_Island_Tourism_Strategy_2035):

The Strategy will aim to build upon Phillip Island's current offering to emphasise high quality and sophisticated experiences and nature-based tourism investment.

The Strategy will be prepared by a team of Australia's tourism planning experts, led by [EarthCheck](#) and [TRC Tourism](#), and will include local tourism industry and community input as well as specialist input from a range of world-leading tourism industry experts.

## Lakes Entrance and surrounds

<b>Competitive grounds:</b>	<b>Popular nature-based tourism destination within Gippsland</b>
<b>Representative Bodies:</b>	<b>East Gippsland Tourism (Shire-run) East Gippsland Marketing Inc. (EGMI)</b>
<b>Website (Industry):</b>	<a href="http://egmi.com.au">egmi.com.au</a>
<b>Website (Consumer):</b>	<a href="http://www.discovereastgippsland.com.au">www.discovereastgippsland.com.au</a>
<b>Facebook:</b>	<a href="https://www.facebook.com/LoveEastGippsland">@LoveEastGippsland</a>

Lakes and surrounds—a component of the greater Gippsland region—had a higher preference to visit of 4.5%.<sup>89</sup>

For the FYE2015, the Lakes region received 643,000 visitors who spent a total of \$324 million.<sup>90</sup>

### Proactive: Going International

In the year 2014-15, East Gippsland took a proactive approach to engaging international tourism.

With the backing Destination Gippsland, EGMI hosted a booth in the media marketplace of the Australian Tourism Exchange. The annual event, led by Tourism Australia, brings more than 2000 media representative and tour operators from around the world. Additionally, with the backing of Tourism Victoria, EGMI hosted seven journalists in the East Gippsland region.<sup>91</sup>

According to EGMI's 2014-15 Annual Report, EGMI is planning to 'work with East Gippsland Shire Council and Business & Tourism East Gippsland on the development of an International Tourism Plan for East Gippsland.'

### Competitor and potential co-promotional ally

Despite meeting the definition of a competing nature-based tourism destination, there is the possibility for Lakes Entrance (and surrounding lakes regions) to be a promotional ally of South Gippsland. Synergy with the features of both destinations as well as their relative proximity means that each destination may leverage the other's successes.

From the South Gippsland perspective, travellers whose primary destination is Lakes Entrance may be targeted for stop-overs and daytrips in South Gippsland.

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<sup>89</sup> Data Insights. *Travel to the Greater Gippsland Region: Year ended December 2015—Quarterly tracking of selected measures*, prepared for Destination Gippsland Ltd. March 2016. p.43.

<sup>90</sup> Austrade, *Lakes\_Supply\_2014-15.xlsx*

<sup>91</sup> East Gippsland Marketing Inc. *Annual Report 2014-15*. Bairnsdale.

## Regional Competition

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### Bass Coast Shire (Wonthaggi/Inverloch)

**Competitive grounds:** Neighbouring regional tourism destination  
Exposure and attention from Destination Gippsland  
Neighbouring regional migration possibility  
Neighbouring potential industry investment location

**Representative body:** Visit Bass Coast (Shire-run)

**Website:** [visitbasscoast.com.au](http://visitbasscoast.com.au)

In 2015, Wonthaggi - Inverloch received 689,000 visitors.<sup>92</sup> That included 258,000 domestic overnight visitors<sup>93</sup> for a total of 727,000 nights.<sup>94</sup>

Nights spent in Wonthaggi – Inverloch can be broken down by the purpose of the visit, showing:

- Holiday = 78.9%
- Visiting Friends/Family = 17.4%
- Business = 3.1%<sup>95</sup>

In 2015, Wonthaggi - Inverloch received 423,000 day-trippers.<sup>96</sup> Broken down by the purpose of their visit, this shows:

- Holiday = 54.4%
- Visiting friends/family = 26.0%
- Business = 6.9%<sup>97</sup>

7,600 international visitors stayed overnight in Wonthaggi - Inverloch during 2015.<sup>98</sup> Their reasons for visiting included:

- Holiday = 61.%
- Visiting friends/family =19.8%
- Business = 2%
- Employment = 15%<sup>99</sup>

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<sup>92</sup> Data Insights. *Travel to the Greater Gippsland Region: Year ended December 2015—Quarterly tracking of selected measures*, prepared for Destination Gippsland Ltd. March 2016. p.11.

<sup>93</sup> *ibid*, p.18

<sup>94</sup> *ibid*, p.20

<sup>95</sup> *ibid*, p.23

<sup>96</sup> *ibid*, p.39

<sup>97</sup> *ibid*, p.41

<sup>98</sup> *ibid*, p.29

<sup>99</sup> *ibid*, p.33



## Synergy with South Gippsland

As an immediate neighbour in the Gippsland region, Bass Coast (Wonthaggi/Inverloch) shares a number of characteristics with South Gippsland. A particular affinity is with those regions of South Gippsland with close proximity to the Prom.

Bass Coast boasts rolling inland hills running towards stunning, rugged coastlines, seaside getaways and famed surf beaches. It is dotted with popular camp grounds, caravan parks and family holiday destinations. Of course, it all leads towards the Victorian tourist icon of Phillip Island.

Despite meeting the definition of a competing nature-based tourism destination, there is the possibility for Bass Coast to be promoted in collaboration with features in South Gippsland.

Close proximity means that there South Gippsland may leverage Bass Coast's success. So too, Bass Coast can leverage South Gippsland's success. Further, Inverloch and Wonthaggi do not currently have a representative local tourism association. For this reason, some businesses have already joined PCRT.

Historically, SGSC and Bass Coast Shire have cooperated closely on many tourism and economic development initiatives, often under the shorthand moniker of *Southern Gippsland*. This relationship may be beneficially expanded in the future.

## Note about Phillip Island

The most significant tourist attraction within the Bass Coast Shire Local Government Area is the famed home of the penguin parade, Phillip Island. An enormously popular destination, Phillip Island is represented by its own Regional Tourism Board, Destination Phillip Island.

Although Destination Phillip Island cooperates closely with the rest of Bass Coast – as well as South Gippsland – Phillip Island's relative operational autonomy necessitates its treatment as a separate region in its own right.

## Latrobe City

<b>Competitive grounds:</b>	<b>Neighbouring regional tourism destination</b> <b>Exposure and attention from Destination Gippsland</b> <b>Neighbouring regional migration possibility</b> <b>Neighbouring potential industry investment location</b>
<b>Representative (Industry):</b>	<b>Latrobe City Business Tourism Association</b>
<b>Representative (Consumer):</b>	<b>Latrobe Visitor Information Centre</b>
<b>Website (industry):</b>	<a href="http://www.lcbta.org.au">www.lcbta.org.au</a>
<b>Website (consumer):</b>	<a href="http://visitlatrobacity.com">visitlatrobacity.com</a>

In 2015, Latrobe received 1.0 million visitors.<sup>100</sup> That included 188,000 domestic overnight visitors<sup>101</sup> for a total of 567,000 nights.<sup>102</sup> Reason for domestic overnight stays in Latrobe include:

- Holiday = 18.7%
- Visiting Friends/Family = 38.1%
- Business = 37.2%<sup>103</sup>

In 2015, Latrobe received 838,000 domestic day-trippers.<sup>104</sup> Broken down by the purpose of their visit, this shows:

- Holiday = 32.9%
- Visiting friends/family = 28.8%
- Business = 15.8%<sup>105</sup>

5,200 international visitors stayed overnight in Latrobe during 2015.<sup>106</sup> Their reasons for visiting included:

- Holiday = 16.7%
- Visiting friends/family = 62.1%
- Business = 17.5%
- Education = 3.8%<sup>107</sup>

Although Latrobe is a neighbouring region, its demography and industry varies considerably to the other GLGN shires in terms of its visitation appeal.

An analysis of their visitation statistics shows that Latrobe features much less as a holiday destination than other Gippsland regions. Instead, Latrobe attracts a much higher rate of business-related visitation.

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<sup>100</sup> Data Insights. *Travel to the Greater Gippsland Region: Year ended December 2015—Quarterly tracking of selected measures*, prepared for Destination Gippsland Ltd. March 2016. p.11.

<sup>101</sup> *ibid*, p.17

<sup>102</sup> *ibid*, p.19

<sup>103</sup> *ibid*, p.23

<sup>104</sup> *ibid*, p.38

<sup>105</sup> *ibid*, p.41

<sup>106</sup> *ibid*, p.28

<sup>107</sup> *ibid*, p.33

## Baw Baw Shire

**Competitive grounds:** Neighbouring regional tourism destination  
Exposure and attention from Destination Gippsland  
Neighbouring regional migration possibility  
Neighbouring potential industry investment location

**Representative Body:** Baw Baw Shire Council

**Website (consumer):** [visitbawbaw.com.au](http://visitbawbaw.com.au)

In 2015, Baw Baw received 980,000 visitors.<sup>108</sup> That included 241,000 domestic overnight visitors<sup>109</sup> for a total of 516,000 visitor nights.<sup>110</sup>

Nights spent in Baw Baw can be broken down by the purpose of the visit, showing:

- Holiday = 40.7%
- Visiting Friends/Family = 46.7%
- Business = 4.7%<sup>111</sup>

Also in 2015, Baw Baw received 733,000 day-trippers.<sup>112</sup> Broken down by the purpose of their visit, this shows:

- Holiday = 35.5%
- Visiting friends/family = 29.6%
- Business = 22.7%<sup>113</sup>

6,500 international visitors stayed overnight in Baw Baw during 2015.<sup>114</sup> Their reasons for visiting included:

- Holiday = 34.5%
- Visiting friends/family = 45.7%
- Business = 9.5%
- Employment = 6.1%
- Education = 4.1%<sup>115</sup>

<sup>108</sup> Data Insights. *Travel to the Greater Gippsland Region: Year ended December 2015—Quarterly tracking of selected measures*, prepared for Destination Gippsland Ltd. March 2016. p.11.

<sup>109</sup> *ibid*, p.17

<sup>110</sup> *ibid*, p.19

<sup>111</sup> *ibid*, p.23

<sup>112</sup> *ibid*, p.38

<sup>113</sup> *ibid*, p.41

<sup>114</sup> *ibid*, p.28

<sup>115</sup> *ibid*, p.33

## East Gippsland

<b>Competitive grounds:</b>	Neighbouring regional tourism destination Exposure and attention from Destination Gippsland Neighbouring regional migration possibility Neighbouring potential industry investment location
<b>Representative Bodies:</b>	East Gippsland Tourism (Shire-run) East Gippsland Marketing Inc. (EGMI)
<b>Website (Industry):</b>	<a href="http://egmi.com.au">egmi.com.au</a>
<b>Website (Consumer):</b>	<a href="http://discovereastgippsland.com.au">discovereastgippsland.com.au</a>
<b>Facebook:</b>	<a href="https://www.facebook.com/LoveEastGippsland">@LoveEastGippsland</a>

In 2015, East Gippsland received 1.2 million visitors.<sup>116</sup> That included 651,000 domestic overnight visitors<sup>117</sup> for a total of 2.2 million visitor nights.<sup>118</sup>

Nights spent in East Gippsland can be broken down by the purpose of the visit, showing:

- Holiday = 64.8%
- Visiting Friends/Family = 20.2%
- Business = 11.8%<sup>119</sup>

Also in 2015, East Gippsland received 526,000 day-trippers.<sup>120</sup> Broken down by the purpose of their visit, this shows:

- Holiday = 68.3%
- Visiting friends/family = 18.0%
- Business = 4.2%<sup>121</sup>

31,900 international visitors stayed overnight in East Gippsland during 2015.<sup>122</sup> Their reasons for visiting included:

- Holiday = 90.3%
- Visiting friends/family = 10.3%
- Employment = 0.9%<sup>123</sup>

<sup>116</sup> Data Insights. *Travel to the Greater Gippsland Region: Year ended December 2015—Quarterly tracking of selected measures*, prepared for Destination Gippsland Ltd. March 2016. p.11.

<sup>117</sup> *ibid*, p.17

<sup>118</sup> *ibid*, p.19

<sup>119</sup> *ibid*, p.23

<sup>120</sup> *ibid*, p.38

<sup>121</sup> *ibid*, p.41

<sup>122</sup> *ibid*, p.28

<sup>123</sup> *ibid*, p.33

## Wellington

**Competitive grounds:** Neighbouring regional tourism destination  
Exposure and attention from Destination Gippsland  
Neighbouring regional migration possibility  
Neighbouring potential industry investment location

**Representative:** Wellington Regional Tourism

**Website (Industry):** [wellingtonregionaltourism.com.au](http://wellingtonregionaltourism.com.au)

**Website (Consumer):** [www.tourismwellington.com.au](http://www.tourismwellington.com.au)

In 2015, Wellington received 916,000 visitors.<sup>124</sup> That included 325,000 domestic overnight visitors<sup>125</sup> for a total of 920,000 visitor nights.<sup>126</sup>

Nights spent in Wellington can be broken down by the purpose of the visit, showing:

- Holiday = 48.7%
- Visiting Friends/Family = 31%
- Business = 17.9%<sup>127</sup>

Also in 2015, Wellington received 579,000 day-trippers.<sup>128</sup> Broken down by the purpose of their visit, this shows:

- Holiday = 40.2%
- Visiting friends/family = 22.3%
- Business = 10.4%<sup>129</sup>

12,000 international visitors stayed overnight in Wellington during 2015.<sup>130</sup>

Their reasons for visiting included:

- Holiday = 54.3%
- Visiting friends/family = 28.3%
- Business = 6.3%
- Employment = 9%<sup>131</sup>

<sup>124</sup> Data Insights. *Travel to the Greater Gippsland Region: Year ended December 2015—Quarterly tracking of selected measures*, prepared for Destination Gippsland Ltd. March 2016. p.11.

<sup>125</sup> *ibid*, p.17

<sup>126</sup> *ibid*, p.19

<sup>127</sup> *ibid*, p.23

<sup>128</sup> *ibid*, p.38

<sup>129</sup> *ibid*, p.41

<sup>130</sup> *ibid*, p.23

<sup>131</sup> *ibid*, p.33

# Branding & Marketing Competition

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## Destination Gippsland

Competitive grounds:	Funding from governing bodies Fund raising from same pool of businesses Campaign competitor (by omission) Does not emphasise Prom Country branding despite covering the same region
Website (Industry):	<a href="http://destinationgippsland.com.au">destinationgippsland.com.au</a>
Consumer-facing URL:	<a href="http://www.inspiredbygippsland.com">www.inspiredbygippsland.com</a> (URL redirects to <a href="http://www.visitvictoria.com">www.visitvictoria.com</a> )

Despite being a sometimes collaborator and a valuable ally for certain promotions, Destination Gippsland also occupies an uneasy position as a competitor for Prom Country Regional Tourism.

Both Destination Gippsland and PCRT seek buy-in from local South Gippsland businesses. Most of South Gippsland's tourism-related businesses are small businesses. Many only have a limited budget for marketing activities and therefore can only afford to buy into PCRT or Destination Gippsland. Therefore, Destination Gippsland and PCRT are in direct competition for this private funding. Further, it is in the administrative interest of both parties to actively discourage participation in the other.

## www.promcountry.com.au

Competitive grounds:	Direct SEO competitor Consumer confusion Prom Country brand reputation risk
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This competitor turns up prominently in Google searches for the term 'prom country', making it a direct competitor in terms of search engine optimisation. As of 28 June 2016, siteprice.org identified the top 5 keywords and phrases that send traffic to the site are *Yanakie accommodation*, *Wilsons Prom accommodation*, *Wilson Prom* [sic], *Yanakie* and *Wilsons Prom accommodation*. This shows that the site is a direct SEO competitor for another of Prom Country's five brand names of importance: Wilson's Prom.

Further, the URL may be easily conflated with the legitimate Prom Country URL, [www.visitpromcountry.com.au](http://www.visitpromcountry.com.au). This may lead to customer confusion.

Finally, this website is very likely to be erroneously construed as an official representation of *Prom Country*. Any publicly accessible communication that can be construed as originating from or relating to the Prom Country brand may impact on its reputation—regardless of whether it is genuinely related. In this sense, the privately owned web domain [promcountry.com.au](http://promcountry.com.au) presents a reputation risk to the brand.



## CHAPTER 6

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# TARGET MARKETS

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Research undertaken by Copy Transmission has profiled current and potential target markets for the South Gippsland brand.

It is recognised that South Gippsland aims to increase its appeal to three distinct audiences:

- Residents
- Businesses
- Visitors.

This section outlines research relevant to these markets and reports on the subsequent analysis and conclusions. Cohort characteristics are defined and may be as an objective foundation for future South Gippsland branding decisions.





## Targeting Business

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The attraction of business investment to regional shires such as South Gippsland is often pursued by establishing industry networks and strategically creating conditions that make investment an inviting commercial prospect. Indeed, branding may play less of a role in attracting business than it does in attracting tourists, but the Brand Review Project may still be able to enhance outcomes.

This is not just the South Gippsland experience, but a common method of operation. According to Copy Transmission's survey of all Gippsland councils, 90% of respondents promote their region to industry by directly reaching out.

To support this methodology, conclusions drawn from Copy Transmission's Brand Review research may be useful to focus networking efforts and to hone the message of development officers. It may also provide additional data worth factoring into broader economic development strategy if the council aims to be responsive to market demand.

It is on this basis that this report presents a profile of the target market for business investment in South Gippsland:

- Businesses that are intrinsically connected to Melbourne
- Agricultural businesses, or associated secondary sector industries
- May be influenced by perceptions of tourism success.

Small businesses in the field of tourism may also be drawn to the shire.

As introduced Chapter 3: Brand Virtues, Copy Transmission's research revealed that the main drawcards that South Gippsland can use to attract large business are:

- Easy access to Melbourne (78%)
- Climate-secure agriculture (51%)
- Supportive communities (43%)
- Affordable acreage (37%)
- increasing number of seasonal visitors (35%).

### Target Melbourne business

**Accessibility** to the state's capital is a benefit that will appeal to a variety of industries. As general as it seems, though, it is clear that respondent advice impels us strongly towards targeting businesses that are intrinsically connected to Melbourne.

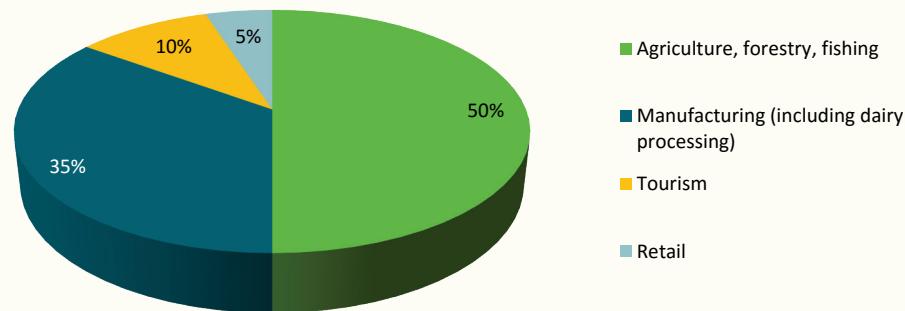
Target businesses may:

- have significant operations based in Melbourne
- sell to Melbourne
- buy from Melbourne
- distribute through Melbourne.

## Target primary and secondary agriculture industries

When asked which industry is most important to South Gippsland's future, there were two clear leaders:

- Agriculture, forestry, fishing (50%)
- Manufacturing (including dairy processing) (35%).



*Industry most important to Shire, as per*

These findings are not surprising given the current and historical contribution that the dairy industry has made to the shire's economy.

*Tourism* came a distant third with 10%. *Retail trade* was the only other industry to get a mention with 5%.

## Leverage tourism promotions to attract and support business

Certainly, attracting business investment is less dependent on tactical marketing than are tourism and resident attraction. That said, both internal and external experts consulted for this project shared the advice that quality tourism promotion and enhanced destination reputation management can serve as a positive factor in attracting regional business investment.<sup>132,133</sup> This attitude has also been clearly stated by South Gippsland Shire Council:

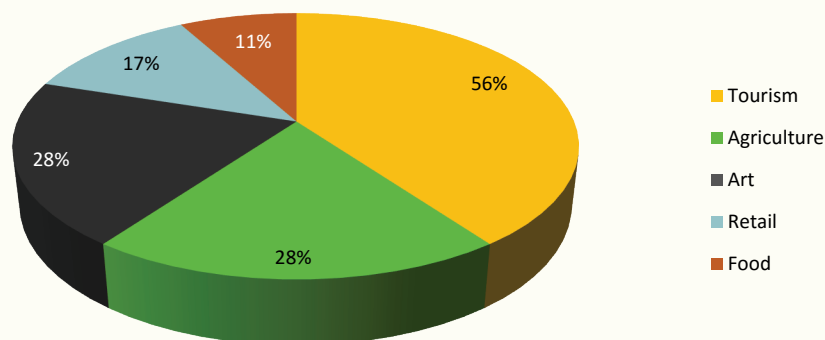
Tourism often makes viable businesses that may not otherwise be, thus retaining employment and activity in the area but by also providing services that enhance the liveability of all residents. This applies to entertainment venues, food establishments, farms, events and natural attractions.<sup>134</sup>

These beliefs seem to be supported by 55% of the respondents to Copy Transmission's local business survey. More than half of South Gippsland's local business respondents say that the *increasing number of seasonal visitors* is a significant motivator for new small-business investment in the shire. It follows, then, that perceptions of being a successful tourism destination may ultimately promote perceptions of being a good place to invest.

Targeting the visitor market is addressed later in this chapter.

## Target the tourism industry

On the issue of which other industries should be nurtured within the Shire, tourism was clearly the number one priority for SGSC.



*Other industries to nurture, as per SGSC respondents*

<sup>132</sup> Consultation with Visit Victoria: April-June 2016.

<sup>133</sup> Consultation with SGSC: April-June 2016.

<sup>134</sup> South Gippsland Shire Council, *Economic Development & Tourism Strategy 2015-2020*. Leongatha: November 2014. p 9.

## Targeting New Residents

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Encouraging and advocating for an increased population is a stated objective for South Gippsland Shire Council.<sup>135</sup> There are a number of strategies sought to help attract new residents. The most salient to this project is the role that increased visitation can play in showcasing South Gippsland as an attractive residential destination:

Tourism is also a vital factor in attracting new residents as many people are first attracted to the area through visiting and often use a 'try before you buy' approach. Many new tourism businesses are established by people relocating to the area. It is also one of the key methods of showcasing the Shire to the wider world.<sup>136</sup>

Potential new residents for South Gippsland are likely to be highly motivated by:

- Natural beauty
- Affordable housing
- Family friendly communities
- Schools.

Although there have been anecdotal suggestions that arts, culture and restaurants might be major selling points to potential movers, the research did not find any significant data to back this up.

Further, new residents are more likely to originate from adjacent regions:

Intrastate movements comprise the bulk of all moves and many of these are over short distances... This relates to familiarity with an area – research has consistently shown that people are more likely to move to an area with which they have some knowledge. Moving short distances also minimises disruptions to education, employment, and social networks, and may also reflect a desire to improve one's position in the housing market.<sup>137</sup>

Further still, Melbournians are more likely to move to regions that are close to the Melbourne Statistical Division boundary.<sup>138</sup>

### SGSC unique selling points for residents

South Gippsland Shire Council respondents largely agreed that the shire's two best unique selling points for residents are:

- Community spirit and town pride (90%)
- Natural beauty (70%).

Other benefits for residents trailed far behind those two, with a dead-heat for third place between:

- Outdoor activities (e.g. cycling, walking, hiking) (40%)
- Exceptional education and healthcare (40%).

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<sup>135</sup> South Gippsland Shire Council, *C19A – Business Investment and Attraction Policy (Adopted)*. Leongatha: June 2014.

<sup>136</sup> South Gippsland Shire Council, *Economic Development & Tourism Strategy 2015-2020*. Leongatha: November 2014. p 9.

<sup>137</sup> State Government of Victoria, *Internal Migration in Victoria*. Melbourne: 2009. p 33

<sup>138</sup> *ibid*, p.34.





## Great place to live

All residents were asked what makes South Gippsland a great place to live.

Significantly popular responses included:

- 1 Natural Beauty (78.7%)
- 2 Community Spirit (48.9%)
- 3 Outdoor Activities—e.g. cycling, walking, hiking (46.8%)
- 4 Quality Local Produce (44.7%)
- 5 Convenient Access to Amenities (36.2%)
- 6 Beaches (36.2%)
- 7 Quality Education (27.7%)
- 8 Quality Healthcare (27.7%)

## Great place to move to

In Copy Transmission's research, respondents who had lived in South Gippsland for five years or less were classified as *new residents*. These new residents were polled on their reasons for coming to South Gippsland.

### Day-to-day factors

To explain why South Gippsland is a great place to live, several factors stood out above the rest for newer residents:

- 1 Affordable housing (64.3%)
- 2 Family friendly communities (57.1%)
- 3 Schools (50%)
  - Public schools (28.6%)
  - Private Schools (21.4%)
- 4 Investment opportunities (42.9%)
- 5 Low crime-rates (35.7%)

### Lifestyle features

When explaining which lifestyle features attracted them to South Gippsland, new residents focussed on three:

- 1 Landscape and Scenery (85.7%)
- 2 Country Lifestyle (85.7%)
- 3 Natural Beauty (78.6%)

#### (Surprisingly?) Unpopular lifestyle responses

Notably, some factors which others had speculated may be drawcards received very few responses or none at all. Among the responses that received zero responses were *restaurants* and *wineries*, while *arts & culture* was mentioned only once.

# Targeting Visitors

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## Average member of the visitor market

Copy Transmission's research has revealed that the average member of South Gippsland's visitor market is:

- aged between 45 and 64
- from Melbourne's south east side
- travels with partner and/or family
- takes influence from tourism brochures
- uses Visit Victoria as a resource
- uses Facebook in their everyday life
- uses TripAdvisor for travels
- has visited South Gippsland more than once
- has used visitpromcountry.com.au when visiting South Gippsland.

Among the visitor market, South Gippsland is perceived as:

- natural, relaxing, rural and welcoming
- primarily a place for enjoying
  - scenic drives
  - beaches
  - the natural beauty of Wilson's Prom
- filled with rolling hills, dairy farms, quaint towns and historical significance
- a region wherein one can enjoy food, wine and fresh produce.

While a number of these target market characteristics were detailed in the earlier chapter regarding brand virtues, others will be elaborated upon here.

Unless otherwise stated, the data reported in this section is derived from Copy Transmission's visitor market research.



## Target suburban Melbourne

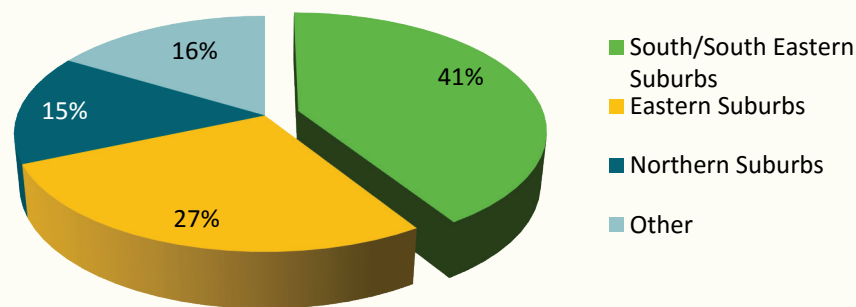
Over 40% of South Gippsland's current visitor market can be traced back to just 34 postcodes, all within Victoria—the *Top 34*. The remainder is spread thinly across hundreds of other postcodes.

### Melbournian Victorians

31 of these *Top 34* were Melbourne postcodes. Of this *Top 34*, there were significant clusters in Melbourne's:

- Southern / South Eastern suburbs (41.1%)
- Eastern Suburbs (27.4%)
- Northern suburbs (15.1%).

Of these results, the skew to the South and South East was expected—providing quantitative evidence in support of similar observations that had previously lacked.



*Geographic clusters within the 'Top 34' postcodes*

### Non-Melbournian Victorians

The non-Melbourne postcodes in the *Top 34* included 3 regional areas that were immediately adjacent to Melbourne's outer suburbs, with only one (Ballarat) located a significant distance from the state's capital.

### Interstate & internationals

13.5% of respondents were from interstate, including NSW (5.8%), SA (3.0%), Queensland (2.8%) and ACT (1.9%) residents.

Interstate respondents were significantly more likely to have not yet visited South Gippsland (51%), despite having exhibited an interest in doing so, Compare this to the 5.1% of Victorians in the current visitor market that exhibited an interest but had not yet visited.



## Target bargain hunters

Copy Transmission's research into the South Gippsland's visitor market found that they are mainly attracted by:

- natural beauty
- good value accommodation

Also, when it comes to activities and attractions the visitor market likes to spend time:

- in state parks
- on scenic drives.

## Promote via Facebook & TripAdvisor

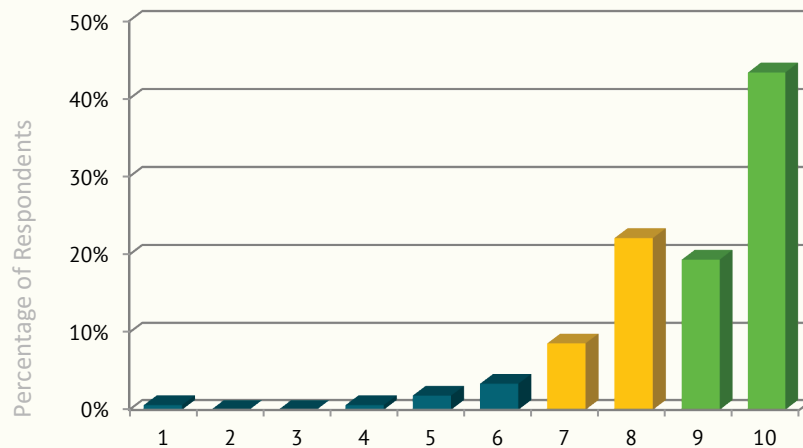
South Gippsland's visitor market predominantly uses:

- Facebook in their everyday life (84.3% *usage*)
- TripAdvisor for travels (78.6% *usage*)

## Promoters and detractors

Copy Transmission applies the *net promoter score* method to provide a snapshot of the spread and skew of the satisfaction curve. This facilitates easy comparisons of an isolated study to established benchmarks.

In the visitor market survey, respondents were asked whether they would recommend South Gippsland as a destination for their friends and family. The results are presented in the chart below.



*Detractor/Promoter scores, as per the South Gippsland visitor market*

In this graph, the entire left side—scores from 0 to 6—represent *detractors*. Detractors are those who's word-of-mouth will have a negative impact on South Gippsland's brand.

Scores of 7 and 8 are deemed *passive*: their word-of-mouth will have no significant effect on South Gippsland's brand.

The very right hand side of the graph—scores of 9 and 10—represent promoters. Word-of-mouth spread by promoters will have a beneficial effect on the South Gippsland brand.

Among South Gippsland's visitor market, 6% were detractors, 31% were passives and 63% were promoters. Subtracting the percentage of detractors from the percentage of promoters gives a *Net Promoter Score (NPS)*. Therefore, South Gippsland's NPS is 57.

When compared to national benchmark scores, South Gippsland's NPS reflects very well. In fact, **only 2 out of 15 destinations from around Australia scored better than South Gippsland**: Broome and Byron Bay. South Gippsland ranks higher than all of Australia's capitals.

## Promote via PCRT website

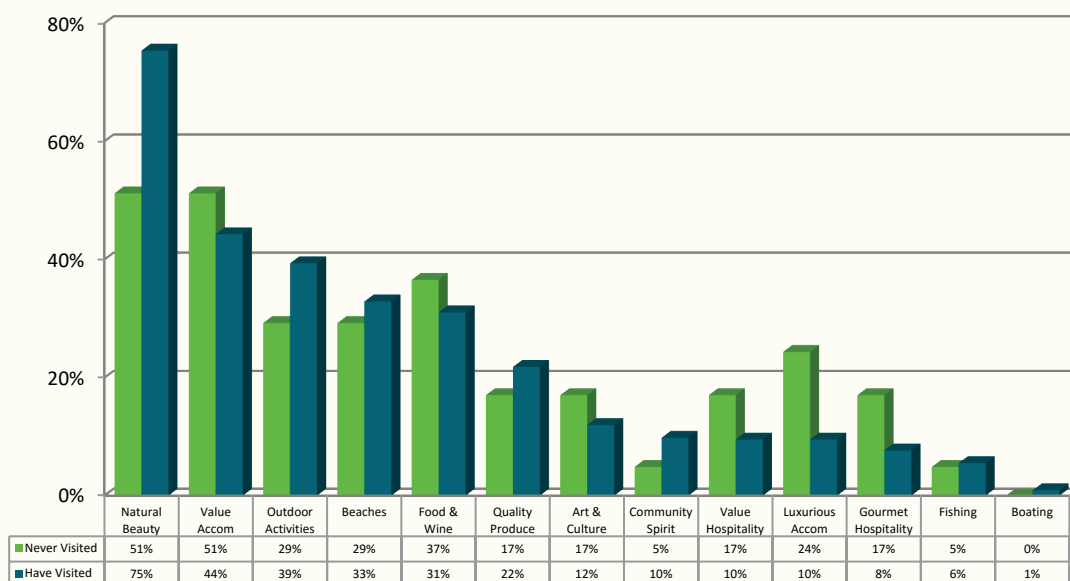
Although PCRT rated second in the question about brochure production, a massive 82.5% of those who have previously travelled to South Gippsland said that they use [visitpromcountry.com.au](http://visitpromcountry.com.au) when visiting South Gippsland.

## Converting the cohort that has not yet visited

By definition, all respondents to the visitor market survey had at least expressed an interest in visiting South Gippsland—with many of them having come to the region at least once before. So, if a significant proportion of the visitor market has not yet visited South Gippsland, we ought to ask: *what is stopping them?*

While a detailed investigation of this matter is beyond the scope of this project, we may gain some insight by comparing the travel priorities of the two cohorts—those who have not visited versus those who have.

### Travel priorities—Never Visited versus Have Visited



It is immediately evident from the general shape of the above chart that both the visited and never visited cohorts share largely similar preferences, but there are some important differences.

Respondents who have not yet visited are significantly **more likely to prioritise:**

- gourmet hospitality (17% compared to 8%)
- art & culture (17% compared to 12%)
- food & wine (37% compared to 31%)
- value accommodation (51% compared to 44%)

Conversely, respondents who have not yet visited are significantly **less likely to prioritise:**

- natural beauty (51% compared to 75%)
- outdoor activities (29% compared to 39%)
- community spirit (5% compared to 10%)

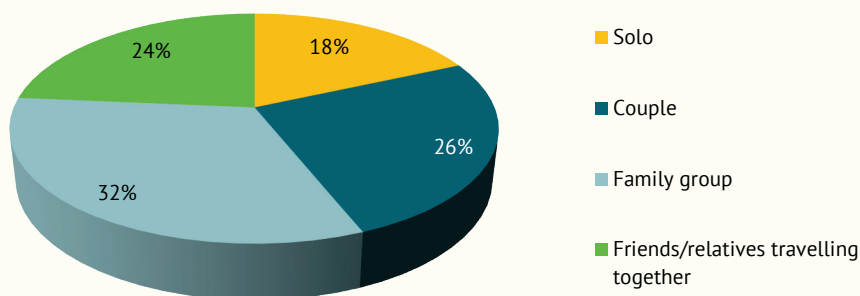
## Overnighters

Presently, day-trippers make up the majority of South Gippsland's visitors.

According to Austrade's 2014 figures,<sup>139</sup> 434,000 people on domestic daytrips spent a total of \$39 million. By comparison, 315,000 visitors who stayed at-least-overnight in South Gippsland spent a total of \$76 million.

So, although there were 27.5% fewer overnighters than day-trippers, the total spend contributed by overnighters was 94.9% higher. There is a very significant advantage in getting visitors to stay overnight.

To effectively target the overnighter audience, a few demographics are worth noting.



*Visitors to South Gippsland, by travel group  
—as per Austrade's Gippsland Tourism Demand 2015*

58% of overnighters travel with partners or families (99,000 and 78,000 visitors respectively). Around a quarter of overnighters come to South Gippsland with friends or relatives (72,000 visitors) while solo travellers make up closer to 1/6<sup>th</sup> (56,000).

Interestingly, even though Melbournians are still a clear majority, Victorians from other regions are significantly more likely to be overnighters than to be day-trippers. 50.6% of overnighter visitors to Gippsland are from Melbourne. 36.3% are from elsewhere in Victoria.<sup>140</sup> This may speak mostly to the fact that accessibility from Melbourne makes day-trips more viable.

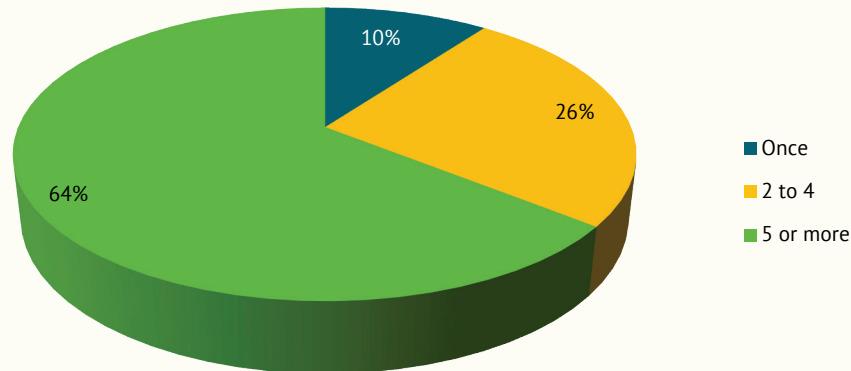
Despite these demographic guides, potential visitors cannot be categorically segregated into distinct *overnighter* and *day-tripper* segments. The same individual may take overnight trips on some occasions and make day-trips on other occasions. The brand and marketing take-home, then, should be to encourage all audiences to make overnight stays in South Gippsland, and to optimise the success of these encouragements by understanding for which segments it has traditionally been successful.

<sup>139</sup> Austrade. *Local Government Area Profiles*, 2014. Canberra: 2014.

<sup>140</sup> Austrade. *Gippsland Tourism Demand 2015*. Canberra: 2015.

## Target repeat visitors

A huge proportion of South Gippsland's visitor market have already visited the shire and are repeat visitors.



*'How many times have you visited South Gippsland?',  
as per the visitor market cohort that has previously visited*

Other responses indicate that this trend should continue: 76.8% of respondents stated a definite intention to visit South Gippsland within the next 2 years. 22.1% said maybe, with only 1.1% saying they would not.

When targeting repeat visitors, the strategic objectives should be to:

- shorten the period between visits
- increase the monetisation during the next visit.

## Food and wine for regional partnership marketing

Although it is not the case in South Gippsland, the #1 activity for both overnights and day-trippers for broader Gippsland is Food & Wine.<sup>141</sup> Therefore, when formulating strategies for cross-promotional opportunities with regional partners, South Gippsland may focus on the food and produce strengths of its constituency.

<sup>141</sup> Austrade. *Gippsland Tourism Demand 2015*. Canberra: 2015.

## International target market

2014 figures from Austrade<sup>142</sup> show that international visitors account for only 1.8% of visitors to South Gippsland, although they do spend at a higher rate than other visitors. In fact, internationals account for 5.7% of the total tourism spend in South Gippsland.

Certainly, internationals are a target market for South Gippsland tourism, but a number of factors combine to make it a relatively low priority.

While the 5.7% of tourism spend that comes from internationals *is* significant, it still pales beside the 94.3% of dollars that come from domestic visitors.

Further, unless very specific promotional channels are selected, promoting to an international audience would be either extremely expensive or comparable to throwing a grain of sand into an ocean. For this reason—among others—Tourism Australia actively leads the promotion of international visitation, as described in Chapter 1.

The same 2014 Austrade figures show that international travellers are likely to stay more than twice as long as domestic overnights. However, they spend 25% less on accommodation per night and 21% less per day on other goods and services. In other words, the total income from internationals is more per visitor, but less per visitor per night. A potential implication of this is that margins for the businesses servicing international travellers may be lower per service.

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<sup>142</sup> Austrade. *Local Government Area Profiles, 2014*. Canberra: 2014.

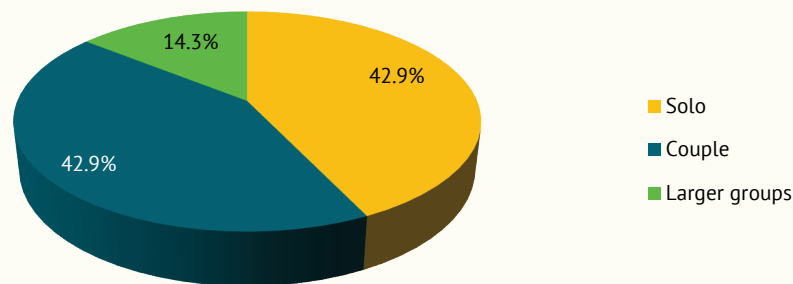


## Targeting internationals effectively

It is questionable whether any impact can be made by advertising directly to overseas markets. Therefore, South Gippsland should focus on reaching out to internationals who are already in or at least committed to coming to Australia.

In this sense, reaching and converting internationals becomes largely synonymous with reaching and converting domestic visitors—although there are some important distinctions.

Austrade's 2014 figures<sup>143</sup> show that unlike other overnights, international visitors do not travel as family units:



Close to 86% of international visitors to South Gippsland are either unaccompanied or travelling with a partner.

Of the 14,000 international visitors that went through South Gippsland annually during Austrade's study period, 3,000 were from Germany and 2,000 were from the UK. Together, German and British visitors account for more than a third of the international tourism to South Gippsland. According to the Austrade report, no other nationality was statistically significant.

Given these figures, it may be worth investing in German translation of certain promotional materials. More detailed research may be required to reveal which specific attractions are of interest to the German market.

Visitors from the UK are expected to know English, hence they can be reached with the same English-language promotions used for the domestic market.

Austrade's figures also reveal that visitors from the UK stay for an average of 3 nights, whereas Germans stay for an average of 2.5 nights. This means that even though fewer British visit than Germans, they are worth per capita in dollar terms—so much so that the actual total spend by the 2,000 British visitors is about the same as that spent by 3,000 Germans.

As a closing observation, it is evident that the *return per acquisition* is higher for British internationals than any other statistically significant international visitor group.

<sup>143</sup> Austrade. *Local Government Area Profiles, 2014*. Canberra: 2014.





## CHAPTER 7

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# MARKETING ACTIVITY AUDIT

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A *marketing activity audit* is designed to establish how well marketing activities are serving the brand's strategy. It is, therefore, an important tool for reflecting upon the effectiveness of brand implementations.

A marketing activity audit can also be valuable for its capacity to identify persistent issues and emerging trends that may be resolvable for the future materials.

Similarly, if issues are seen to arise repeatedly and despite efforts at resolution, it can indicate a need to review the evaluation criteria and/or to investigate potentially systemic problems.



## Methodology

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This section addresses the question: *How effective is current South Gippsland marketing activity?*

To answer that question, past and current marketing materials that are relevant to the South Gippsland brand are evaluated against a set of objectively developed brand criteria along with a few basic measures of communicational quality.

The objective criteria are built largely upon the findings described in earlier chapters of this report.

## Materials audited

Copy Transmission has audited numerous South Gippsland marketing materials and activities from three key sources:

- 1 Prom Country Regional Tourism
- 2 South Gippsland Shire Council
- 3 Destination Gippsland.

The materials range in date from 2006 to 2016.

Where online resources are subject to audit, it is performed on the each resource as it appears during the period of the Brand Review project.

## Evaluation criteria

As the criteria to evaluate the marketing materials, the marketing activity audit will use the core brand virtues as identified in the earlier Chapter 3: Brand Virtues

In addition to this, the audit takes into account the prominence and consistency of the use of brand assets, as described in the Chapter 4: Brand Audit.

Finally, the materials are also audited against a set of *quality* based criteria.

## Brand virtues

As described in an earlier chapter, South Gippsland's eight core brand virtues can be easily understood as fitting into one of three categories:

### 1 Inherent

- Flagship Virtue: Natural beauty
- Easily accessible to Melbourne.

### 2 Abstract

- Welcoming
- Relaxing

### 3 Monetisable

- good food and fresh produce
- good value accommodation
- quaint towns and villages
- outdoor activities.

Brand communications that meet these criteria may be regarded as *on-brand*.

## Flagship Virtue

Natural Beauty has been designated the flagship virtue. Across all groups, it was the single most commonly cited attractive feature for South Gippsland. As the flagship virtue, natural beauty is not something that needs to be sold to the audience—it is something that *sells* South Gippsland to the audience.

## Visual cues

Visual cues provide an important way for audiences to readily recognise a brand, so it is important that they be used consistently across marketing materials. The visual cues assessed herein include:

- **logo**—does it appear in conformance with established guidelines/usage?
- **imagery**—is its style consistent and expressive of the brand virtues?
- **typefaces**—are they used in a distinctive and cohesive manner?

In the absence of established *visual identity guidelines* for the South Gippsland brand—the establishment of which is outside the scope of the current project—Copy Transmission has extrapolated from the typical behaviours of South Gippsland marketing agents, augmented to conform to the aforementioned brand virtues as well as industry best practice.

While the brand virtues are held to be the same ideals across all outlets, it is important to recognise that there is some justification for the use of different visual cues across the different operators. For example, the marketing materials developed by South Gippsland Shire Council can be expected to use different visual cues from ones that are produced by Prom Country Regional Tourism. Similarly, each agency may primarily service different target markets, therefore the aesthetics deployed by vary accordingly.

## Quality

Branded communications must satisfy benchmarks for communicational quality in order to penetrate resistance and register with its target audience.





All South Gippsland marketing materials should satisfy the following criteria:

- **clarity of message**—is the core message clearly conveyed?
- **concision of phrasing**—does it get to the point efficiently?
- **relevance**—are all elements relevant to the goal?
- **necessity**—are all elements necessary to achieve the goal?
- **polish**—is the message delivered artfully and persuasively?

## Notation & Reportage

The results of the audit for each source is represented by the quick-reference tables below. For each source, the tables are split between *On-brand* criteria, *Visual Cues* criteria and criteria of *Quality*.

For each criteria, each piece of audited material is given a grading, as follows:

	Green = Fully satisfies the criteria
	Yellow = Only partially satisfies the criteria/Improvement needed
	Red = Fails to satisfy the criteria
	Black = Not applicable

It is acknowledged not all criteria will be equally appropriate for all executions. For example, the consistent application of branded typefaces may not be an applicable criterion for promotions and PR published on third-party websites. In instances such as this, inapplicable criteria will be coloured with a neutral black to show they have been attended but adjudged as not applicable.

## Note on the reading and application of results

The value of this audit is in establishing how well marketing activities have been serving the brand's effectiveness *as it is presently envisaged*.

Given the absence of any firm guidelines for the South Gippsland brand, the charts and reportage that follow are based on evaluation criteria established for the purposes of this project. This means the criteria are retrospective by definition. The agencies involved cannot have been aware of these criteria when creating the marketing materials simply because the criteria did not exist at that time. Indeed, some of the criteria may heretofore not have been promotional priorities known to all parties.

Therefore, the results of the audit ought not to be used as a sole basis for evaluating the agencies involved in producing the materials, but rather as an illustration of how the proposed virtues retrospectively match with historical promotional materials, to identify which elements may require genuine change in promotional strategy and as a benchmark for future marketing activities.

## PCRT Marketing

Marketing activity initiated by the Prom Country Regional Tourism (PCRT) is herein evaluated on the basis of thirty (30) submitted productions from 2006 to present.

Marketing materials subjected to audit include print ads and brochures, PR and media placements, direct mail campaign communications and online resources.

### Brand virtues, 2006-2012

From the samples ranging 2006 to 2012, PCRT's marketing materials displayed solid adherence to the flagship brand virtue—natural beauty.

During the same period, the application of abstract and monetisable brand virtues was patchy at best.

	2006 Marketing Material :: Fire Recovery	2008 Sentinel Advert	2008 Star Advert	2009 Caravan Camping Guide Ad	2009 Caravanning Australia 2-pager	2009 Herald Sun Escape feature	2010 Caravan Magazine Ad	2010 Milk Magazine Ad	2010 Prom Country eDM	2010 Sydney to Melbourne Coastal Drive	2010 Star Advert	2011-12 RACV Online Promotion Dec. – Jan.	2011 Totaltravel.com – Online promotion Nov.	2012 Winter Brochure	2012 Sentinel Advert (Summer)	2012 RACV Walking Trails Insert
<b>Flagship</b>																
Natural Beauty																
<b>Inherent</b>																
Access to Melbourne																
<b>Abstract</b>																
Welcoming																
Relaxing																
<b>Monetisable</b>																
Food & fresh produce																
Value accom.																
Quaint villages																
Outdoor activities																

Abstract brand virtues were inconsistently portrayed during the period. Print advertisements in the Star and the Sentinel promoting intra-regional visitation raised the most red flags.

The projection of 3 out of 4 monetisable brand virtues was deemed ineffective most of the time. Food and fresh produce received at least partial coverage in most materials. Value accommodation and quaint villages often failed to get a look in at all.

The one exception was outdoor activities, which was almost always well represented.

## Brand virtues 2013-present

Since 2012, PCRT's marketing materials have effectively espoused the flagship brand virtue—natural beauty.

During the same period, the application of abstract brand virtues was inconsistent. The projection of monetisable brand virtues was also often deemed ineffective.

	2013 Prom Country Winter Specials	2013 Drive Southern Gippsland	2014 Winter Specials	2015 Winter Specials	2015 Prom Country Walking Trails	2015 Water Activities	2016 Tours Guide	2016 RACV Drives Insert	2016 Prom Country Shopping & Dining Guide	2016 Prom Country Touring Map	2016 Prom Country Visitor Guide	Prom Country App (May 2016 Update)	www.visitpromcountry.com.au (as at June 2016)	2016 Prom Country Indigenous Birds Brochure (production is in Progress)
<b>Flagship</b>														
Natural Beauty														
<b>Inherent</b>														
Access to Melbourne														
<b>Abstract</b>														
Welcoming														
Relaxing														
<b>Monetisable</b>														
Food & fresh produce														
Value accom.														
Quaint villages														
Outdoor activities														

While the promotion of food and fresh produce has tapered over the period, it still receives at least partial coverage most of the time.

Since 2012, value accommodation has correctly become a more salient feature of PCRT's marketing materials—hitting the mark more than half the time.

Quaint villages are still being overlooked most of the time.

Outdoor activities again featured well across most material.



## Visual cues

In auditing visual cues for these materials, the PCRT logo is considered pivotal. The aesthetic should target visitors from outside of the shire.

### PCRT visual cues, 2006-2012

From 2006 to 2012, there were some apparent issues with the inclusion of the PCRT logo on the relevant marketing materials. However, the use of accompanying imagery has been largely consistent and on-brand.

	2006 Marketing Material :: Fire Recovery	2008 Sentinel Advert	2008 Star Advert	2009 Caravan Camping Guide Ad	2009 Caravanning Australia 2-pager	2009 Herald Sun Escape feature	2010 Caravan Magazine Ad	2010 Milk Magazine Ad	2010 Prom Country eDM	2010 Sydney to Melbourne Coastal Drive	2010 Star Advert	2011-12 RACV Online Promotion Dec. – Jan. 2011-2012	2011 Totaltravel.com – Online promotion Nov.	2012 Winter Brochure	2012 Sentinel Advert (Summer)	2012 RACV Walking Trails Insert
Logo																
Imagery																
Typefaces																

*Traffic light assessment of PCRT's use of visual cues, 2006-2012*

The application of typefaces was inconsistent throughout the period.

### PCRT visual cues, 2013-present

From 2013 to present, PCRT's application of branded visual cues has been largely successful. In all cases, the imagery and typefaces have proved to be at least on the right track and usually dead on the mark. However, there have been isolated instances where the PCRT logo has not been correctly applied.

	2013 Prom Country Winter Specials	2013 Drive Southern Gippsland	2014 Winter Specials	2015 Winter Specials	2015 Prom Country Walking Trails	2015 Water Activities	2016 Tours Guide	2016 RACV Drives Insert	2015-16 Prom Country Shopping & Dining Guide	2016 Prom Country Touring Map	2016 Prom Country Visitor Guide	Prom Country App	www.visitpromcountry.com.au	2016 Prom Country Indigenous Birds Brochure (production is in progress)
Logo														
Imagery														
Typefaces														

*Traffic light assessment of PCRT's use of visual cues, 2013-June 2016*

For the most part, materials that have come out since 2014 have fared well in relation to all branded visual cues. Only 2016 *Tours Guide* and 2016 *Prom Country Indigenous Birds* has outright failed to satisfy one criterion.

## Quality 2006-2012

From an execution perspective, PCRT's marketing materials are high quality from 2009-2012. Prior to that date, it is evident that there may have been some confusion over the strategic message intended to be conveyed.

	2006 Marketing Material :: Fire Recovery	2008 Sentinel Advert	2008 Star Advert	2009 Caravan Camping Guide Ad	2009 Caravanning Australia 2-pager	2009 Herald Sun Escape feature	2010 Caravan Magazine Ad	2010 Milk Magazine Ad	2010 Prom Country eDM	2010 Sydney to Melbourne Coastal Drive	2010 Star Advert	2011-12 RACV Online Promotion Dec. - Jan. 2011-2012	2011 Totaltravel.com - Online promotion Nov.	2012 Winter Brochure	2012 Sentinel Advert (Summer)	2012 RACV Walking Trails Insert
Clarity of message	Red	Red	Red	Green	Yellow	Black	Green	Green	Green	Yellow	Red	Green	Green	Green	Yellow	Green
Concision of phrasing	Red	Green	Green	Green	Yellow	Black	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Green
Relevance	Red	Yellow	Yellow	Green	Yellow	Black	Green	Yellow	Green	Yellow	Yellow	Green	Green	Green	Yellow	Green
Necessity	Red	Yellow	Yellow	Green	Yellow	Black	Green	Yellow	Green	Yellow	Yellow	Green	Green	Green	Yellow	Green
Polish	Yellow	Green	Green	Green	Yellow	Black	Yellow	Green	Green	Red	Green	Green	Green	Yellow	Yellow	Green

## Quality 2013-present

In the period 2013 to present, PCRT's marketing materials have largely upheld the five ideals of quality set as evaluation criteria.

	2013 Prom Country Winter Specials	2013 Drive Southern Gippsland	2014 Winter Specials	2015 Winter Specials	2015 Prom Country Walking Trails	2015 Water Activities	2016 Tours Guide	2016 RACV Drives Insert	2015-16 Prom Country Shopping & Dining Guide	2016 Prom Country Touring Map	2016 Prom Country Visitor Guide	Prom Country App	www.visitpromcountry.com.au	2016 Prom Country Indigenous Birds Brochure (in progress)
Clarity of message	Yellow	Yellow	Yellow	Yellow	Green	Green	Yellow	Green	Green	Green	Green	Red	Yellow	Yellow
Concision of phrasing	Green	Yellow	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Yellow	Yellow	Green
Relevance	Yellow	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Yellow
Necessity	Yellow	Yellow	Yellow	Green	Green	Yellow	Green	Green	Green	Yellow	Green	Yellow	Yellow	Yellow
Polish	Red	Yellow	Red	Red	Green	Green	Yellow	Yellow	Yellow	Green	Yellow	Yellow	Yellow	Green

Over the period 2013 to 2015, there were some persistent issues with the professional polish of the output, but this seems improved as of 2015. Of the 2016 materials, fulfilment of the criteria is high, although they could still be better in terms of professional polish. The Prom Country App is one item that has room for improvement in all criteria.

# South Gippsland Shire Council Marketing

Marketing activity initiated by the South Gippsland Shire Council is herein evaluated on the basis of seven (7) submitted productions—including six print brochures and one promotional video—from 2010 to present.

For the most part, the strategic objective of these productions is to promote the local features that make South Gippsland and its component regions a good place for residents and businesses. As the ongoing campaign's tag makes clear, it's about selling the idea that South Gippsland is a great place to *live*, to *work* and to *invest*.

## Brand virtues

Since 2010, marketing materials produced by South Gippsland Shire Council have displayed a good promotion of the brand's virtues.

	2010 Leongatha – Live. Work. Invest.	2011 Korumburra – Live. Work. Invest.	2012 South Gippsland - Live. Work. Invest.	2012 Mirboo North – Live. Work. Invest.	2013 Toora – Live Work. Invest. <sup>144</sup>	2014 Foster – Live. Work. Invest. <sup>145</sup>	Video – SouthGippsland.m4v (Year unknown)
<b>Flagship</b>							
Natural Beauty							
<b>Inherent</b>							
Access to Melbourne							
<b>Abstract</b>							
Welcoming							
Relaxing							
<b>Monetisable</b>							
Food & fresh produce							
Value accom.							
Quaint villages							
Outdoor activities							

<sup>144</sup> Given Toora's distance from Melbourne (over 2hrs driving), the criteria of 'Access to Melbourne' has been deemed not applicable as a saleable virtue.

<sup>145</sup> Given Foster's distance from Melbourne (over 2hrs driving), the criteria of 'Access to Melbourne' has been deemed not applicable as a saleable virtue.

In fact, South Gippsland Shire Council's coverage of the *virtues* criteria seems to have mildly improved over time. One potential exception to that rule may be the one-off foray into video promotion – while the video hits six of the eight criteria very well, it earns red flags for failing to illustrate the shire's access to Melbourne or the availability of value accommodation.

Outdoor activities were exceptionally well represented.

## Visual Cues

For the marketing materials developed by South Gippsland Shire Council, the visual cues are evaluated in relation to the Shire's official logo and an aesthetic that is targeted more towards residents and businesses rather than tourists.

Apart from a stutter with the very earliest of the audited marketing materials, South Gippsland Shire Council's application of branded visual cues to its marketing output has been largely consistent and very good.

	2010 Leongatha – Live. Work. Invest.	2011 Korumburra – Live. Work. Invest.	2012 Mirboo North – Live. Work. Invest.	2013 Toora – Live Work. Invest.	2014 Foster – Live. Work. Invest.	2014 – South Gippsland - Live. Work. Invest.	Video – SouthGippsland.m4v (Year unknown)
Logo							
Imagery							
Typefaces							

## Quality

Regarding the execution of the produced materials, SGSC has mainly made high-quality materials that look good and are strategically sound. That said, there appears to have been a minor stutter over the years 2012 to 2013, well resolved thereafter.

	2010 Leongatha – Live. Work. Invest.	2011 Korumburra – Live. Work. Invest.	2012 Mirboo North – Live. Work. Invest.	2013 Toora – Live Work. Invest.	2014 Foster – Live	2014 – South Gippsland - Live. Work. Invest.	Video – SouthGippsland.m4v
Clarity of message							
Concision of phrasing							
Relevance							
Necessity							
Polish							

## Destination Gippsland Marketing

Marketing activity initiated by the Destination Gippsland is herein evaluated on the basis of eleven (11) submitted productions—print ads, brochures and one promotional video—from 2009 to 2013. The materials promoted via the Destination Gippsland website were last updated in 2013. The most recent consumer promotion—the *Gippsland Road Trip 2015*, had closed prior to this project—and the website is currently inactive and unavailable for assessment.

Destination Gippsland's marketing materials are not solely focussed on South Gippsland. It positions South Gippsland within the broader context of the entire Gippsland region. The items deemed relevant to this project are ones which contain at least a section that pertains directly to South Gippsland.

That said, four (4) of the Destination Gippsland marketing materials audited herein do explicitly focus on South Gippsland—albeit as part of a series that feature each Gippsland region at one time or another.

### Brand Virtues

Destination Gippsland's marketing materials are great at emphasising the natural beauty of South Gippsland. They're pretty good at illustrating that the shire is welcoming and relaxing too. Just over half promote fresh food and produce. Value accommodations is almost entirely neglected, while quaint villages are mentioned just over 1/3 of the time. Outdoor activities, however, were a standout. They were well featured in all but one instance.

	2009 Coffee Cup Wraps	2009 Gippsland Touring Map	2010 Prom Country eDM (Food & Wine)	2010 Gippsland Walks	2011 Caravan & Camping Guide	2011 Walks Guide	2012 Gippsland Rides Brochure	2011 Royal Auto Prom Country Feature Dec-Jan	2011 Sunday Magazine – Prom Country Feature	2011 Herald Sun Escape Advert – Prom Country Villages	2012 Touring Map	2012 Caravan & Camping Guide	2012 SBS Commercial	2013 Accessible Gippsland Brochure
<b>Flagship</b>														
Natural Beauty														
<b>Inherent</b>														
Access to Melbourne														
<b>Abstract</b>														
Welcoming														
Relaxing														
<b>Monetisable</b>														
Food & fresh produce														
Value accom.														
Quaint villages														
Outdoor Activities														

## Visual cues

For the marketing materials developed by Destination Gippsland, the visual cues are evaluated in relation to the Gippsland Brand Guide.<sup>146</sup> As there is no representation of the PCRT or SGSC logos in any of these materials, the criteria for *logo* is not applicable. In future, it may be better to ensure that Destination Gippsland's materials also feature direct references the visual identity of South Gippsland where appropriate.

Given Destination Gippsland's organisational purpose, its aesthetic is expected to be targeted exclusively at tourists, with the understanding that there are likely flow-on benefit with regards to attracting residents.

	2009 Coffee Cup Wraps	2009 Gippsland Touring Map	2010 Prom Country eDM (Food & Wine)	2010 Gippsland Walks	2011 Caravan & Camping Guide	2011 Gippsland Walks	2012 Gippsland Rides Brochure	2011 Royal Auto Prom Country Feature Dec.-Jan	2011 Sunday Magazine – Prom Country Feature	2011 Herald Sun Escape Advert – Prom Country Villages	2012 Gippsland Touring Map	2012 Caravan & Camping Guide	2012 SBS Prom Country Commercial	2013 Accessible Gippsland Brochure
Logo														
Imagery														
Typefaces														

The application of visual cues is consistent and quite excellent across all materials.

## Quality

From a pure execution perspective, the quality of materials produced by Destination Gippsland is almost entirely excellent. That said, there have been a couple of items wherein the promotional message seemed somewhat muddled.

	2009 Coffee Cup Wraps	2009 Gippsland Touring Map	2010 Prom Country eDM (Food & Wine)	2010 Gippsland Walks	2011 Caravan & Camping Guide	2011 Gippsland Walks	2012 Gippsland Rides Brochure	2011 Royal Auto Prom Country Feature Dec.-Jan	2011 Sunday Magazine – Prom Country Feature	2011 Herald Sun Escape Advert – Prom Country Villages	2012 Gippsland Touring Map	2012 Caravan & Camping Guide	2012 SBS Prom Country Commercial	2013 Accessible Gippsland Brochure
Clarity of message														
Concision of phrasing														
Relevance														
Necessity														
Polish														

<sup>146</sup> State Government of Victoria. *Gippsland Guide Book*. Melbourne: June 2010.



## CHAPTER 8

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### CURRENT BRAND :: SWOT

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## Strengths

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### **Projection of flagship virtue is consistently effective**

Regardless of the source and across virtually all marketing materials, South Gippsland's flagship virtue, natural beauty, is a consistent prominent feature.

This success is important and care should be taken to ensure that it continues. A relative saturation of nature-based associations allows for the deployment of other brand virtues—especially those that relate specifically to the monetisable virtues—without diluting the prime association of Prom Country with an abundance of natural beauty.

### **Projection of the *outdoor activities* virtue is consistently effective**

Given its affinity to the flagship virtue, it is perhaps no surprise that outdoor activities are consistently well represented throughout South Gippsland marketing activities.

This strength is to be maintained, as outdoor activities have been identified as a key monetisable attraction for the region.

### **Style of imagery is consistent and expressive of brand virtues**

Taking imagery into account specifically, the style is generally consistent and expressive of brand virtues across all marketing materials regardless of the source. Sweeping natural vistas, gorgeous flora and fauna, people enjoying outdoor activities amid beautiful natural settings—all are commonly featured.

If there is room for improvement, it is that materials should integrate more photos that combine great food and produce and quaint villages with striking natural beauty. Likewise, images of welcoming proprietors might also be integrated more often.

The upshot: while natural beauty is the flagship, and is rightly prioritised, it may also be used to usher in supporting imagery that showcased the other, more diverse and directly monetisable virtues.

## Weaknesses

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### Ineffective projection of 3 out of 4 monetisable virtues

While occasionally and sparsely featured, and with the exception of 'outdoor activities', South Gippsland's key monetisable virtues are not effectively projected. This must be viewed as a weakness. In particular:

#### Good food & wine, fresh produce

Despite a growing number of high quality producers in the South Gippsland region, and its demonstrated importance as an attraction for both domestic and international visitors, good food, wine and fresh produce is not well represented among South Gippsland marketing materials.

While the virtue is recognised as a feature of the region among those who *have* visited (and hence have had the chance to discover its abundance for themselves), good food and fresh produce is not a widely cited perception of the area among those who *have not yet* visited.

This must be addressed.

As indicated in the research, visitors who have not yet visited South Gippsland are significantly more likely to prioritise gourmet hospitality and food & wine when making a travel decision compared to those who have already visited South Gippsland.

As such, promotion of food & produce may be especially effective in attracting new visitors.

This gap between consumer perception and supply side realities should be rectified via greater promotion of good food and fresh produce in future marketing materials.

#### Good value accommodation

Research finds that South Gippsland's target markets place a higher priority good value accommodation when choosing a destination than on luxury accommodation. This finding applies to new residents as much as it does to visitors: While the visitor market has said they are more concerned with good value accommodations, new residents consistently rate affordability of housing very highly as key saleable quality of South Gippsland.

Good value accommodation (relatively low cost), rather than luxurious accommodation (relatively high cost), is what South Gippsland currently does best.

However, this key virtue is not effectively projected across the majority of South Gippsland marketing materials.

Proudly and specifically promoting this virtue should be prioritised to increase the effectiveness of South Gippsland marketing activities.

## Quaint villages & towns

The quaint character of South Gippsland towns and villages is commonly cited as a positive virtue by South Gippsland target markets: visitors, residents and even, to a degree, business.

South Gippsland's current strength, its most promoted and recognised drawcard, is nature-based attractions. However, for nature-based attractions, direct monetisation can be problematic. (The 12 Apostles is a particularly stark example of this common challenge.<sup>147</sup>) When consumers set out specifically to visit a village or a town, on the other hand, they are likely to either shop, dine or stay.

From a visitation point of view, tourism to villages and towns is directly monetisable because it brings outside money into local cafés, restaurants, galleries, accommodation operators, etc.

From a residential attraction and business investment point of view, casual visitation is recognised as a common discovery gateway that may lead to establishing a residence or business in the visited village or town.

The promotion of South Gippsland's quaint character is, therefore directly monetisable, and should receive greater prioritisation in future marketing activities.

## Low-participation in the ATDW

The ATDW was created to increase the digital distribution and online exposure of tourism operators across Australia. It is a joint initiative by Tourism Australia and all of the State and Territory tourism organisations.

If many South Gippsland businesses were on the system, the region would be better represented and may seem like a preferred destination. Of course, this is unlikely to happen while the businesses perceive it as a poor value investment.

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<sup>147</sup> Jean Edwards. *New lookouts at Twelve Apostles part of multi-million-dollar makeover*. ABC News: 2016.

## Opportunities

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### Greater sell of attractive proximity to Melbourne

South Gippsland's natural beauty and close proximity to Melbourne are virtues inherent to the geographic location of the region.

While the flagship virtue—natural beauty—is well promoted across most marketing materials, the secondary inherent virtue—close proximity to Melbourne—is applied less consistently.

Among visitors, residents and business alike, South Gippsland's convenient proximity to Melbourne is commonly understood to make the region attractive to live, work and invest. Further, it is one of the key decision making factors for South Gippsland's target markets.

Increasingly prominent and consistent application of this virtue in marketing materials is an easy opportunity to improve the outcomes of that appeal.

### Be more inviting, consistently apply abstract virtues

Presently, South Gippsland's abstract virtues, *welcoming* and *relaxing*, are espoused somewhat inconsistently across marketing activities.

Whereas other brand virtues relate to concrete, tangible elements (geographical location, specific products and features, etc.), it is the consistent application of these virtues that engender important positive *emotional* and *attitudinal* perceptions of the brand.

While the virtues of *welcoming* and *relaxing* appear sometimes in current marketing, there is certainly an opportunity to give them greater emphasis.

### Raise brand awareness, featuring PCRT logo more

While the Prom Country logo is generally applied in conformance with established usage, it is rarely featured prominently. There is an opportunity to build awareness, familiarity and positive associations with the Prom Country visual identity by featuring it more heroically throughout future marketing materials.

### Prom Country app

The Prom Country app is functional, comprehensive and potentially a great asset to the Prom Country brand.

The app received relatively low ratings in the marketing activities audit, however, it's worth noting that pure utility is not one of the criteria. Brand virtues issues aside, it works very well as a tool for exploring the region.

To have a widely available app at this stage of development puts Prom Country ahead of many competitors. Refining the strategic and aesthetic elements of the app could make it a standout ambassador for the brand.

# Threats

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## Brand network alienation

PCRT and Destination Gippsland have become alienated. Because Destination Gippsland plays a pivotal role in the destination branding network — particularly upstream to Visit Victoria — South Gippsland is at risk of losing its voice in the wider Victorian context too.

## Brand fragmentation

Under the banner of 'Prom Country' exist a multitude of diverse sub-regions. From the northwest districts through to the Prom itself in the southeast, the landscape, character and defining features vary enormously: Verdant velvet hills. Dense native bushland. Temperate rainforests. Craggy cliffs. Surf and sand.

South Gippsland is diverse, and there must be scope within any successful brand framework to incorporate many vibrant sub-regional identities into a mutually beneficial whole.

Together, diverse strengths can be knitted together to form a fabric that is stronger than the constituent threads alone.

Alternatively, a proliferation of regional sub-brands that do not coordinate with an overarching strategy does the opposite. Where there was mutually beneficial cooperation is duplication of effort, inefficiency and counterproductive competition.

Safeguarding against such brand fragmentation is of particular concern for South Gippsland.

## Fragmentation: Tarwin Valley Case Study

The recently developed Tarwin Valley brand has much to commend it: the efforts and initiative taken by the local community to identify their core values and offerings has produced a coherent, authentic and attractive identity for their region. They've also developed an attractive logo and logotype and — as their primary public representation — a website [www.tarwinvalley.com.au](http://www.tarwinvalley.com.au).

However, the Tarwin Valley brand does not currently fit wholly comfortably within the wider Prom Country brand framework:

- The prominent use of *Southern Gippsland* rather than *South Gippsland* in their logotype is problematic.<sup>148</sup> Its usage makes it more difficult for consumers to get a clear understanding of regional conventions. As such, it fragments the South Gippsland brand.
- Tarwin Valley is not officially integrated with PCRT, as evidenced by their absence from the [visitpromcountry.com.au](http://visitpromcountry.com.au) community listings.
- [www.tarwinvalley.com.au](http://www.tarwinvalley.com.au) lists a number of businesses from well outside the Tarwin Valley region in their *Eating & Sleeping* section,<sup>149</sup> further fragmenting the South Gippsland brand by blurring regional distinctions.
- the footer of [www.tarwinvalley.com.au](http://www.tarwinvalley.com.au) prominently features logos and links for several destination brand network agencies—implying official affiliation where none currently exists.<sup>150</sup>

While these current issues must be acknowledged, none are insurmountable. Indeed, there are many positives to be harnessed for the good of the whole South Gippsland region. With few strategic adjustments, the Tarwin Valley sub-regional brand could be transformed from a brand fragmentation risk into a South Gippsland brand asset.

## Reputation risk

Any communication or interaction that may be perceived, whether correctly or not, as originating with a brand can impact upon that brand's reputation.

Apart from the need to be vigilant to ensure that one's own brand communications always reflect the brand in the best light, it is important to take measures to mitigate against any external reputation risks.

In the case of the Prom Country brand, one such specific risk has been identified: The website [www.promcountry.com.au](http://www.promcountry.com.au) has no official affiliation with Prom Country representation, however it is very likely to be erroneously construed as such online. As such, it may impact upon public perceptions of the Prom Country brand.

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<sup>148</sup> It is acknowledged that *Southern Gippsland* is sometimes used as shorthand for joint initiatives between South Gippsland and Bass Coast Shires, however there is no evidence of common usage nor understanding outside of the immediate region.

<sup>149</sup> Amongst the businesses erroneously listed in the Tarwin Valley region are operations located in Bena, Kardella South, Strzelecki, Kongwak, Inverloch and Leongatha.

<sup>150</sup> This is potentially a significant issue as the implied affiliation can result in content hosted on [www.tarwinvalley.com.au](http://www.tarwinvalley.com.au) being publicly held as representative of the non-affiliated bodies.

## CHAPTER 9

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# RECOMMENDATIONS

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Copy Transmission makes the following thirty-three recommendations to achieve a well-integrated place-based branding framework for South Gippsland.

Estimates of resource requirements and potential options have been included where available and appropriate.

The thirty-three recommendations that follow are divided into five sets.

- Brand asset recommendations
- Promotional recommendations
- Online recommendations
- Organisational recommendations
- Grass-roots engagement recommendations

A quick reference list is provided in the Executive Summary for an at-a-glance overview. This chapter contains the details of each recommendation.





# Brand Asset Recommendations

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## 1. Maintain the *Prom Country* brand name

This study has noted a broad spectrum of feelings about the current *Prom Country* brand from some local stakeholders. There are vocal proponents of change with regards to what is perceived as *prom-centric* branding. But the number who urge change are counterbalanced by others who believe, equally as strongly, that the Prom should be central to branding.

### Survey results

To measure the leanings of stakeholders, a scale was established: 0 represents the belief that South Gippsland's branding should focus *not-at-all* on Wilsons Prom, 100 represents the belief that the brand should be *totally focussed on Wilsons Prom*. The average score given by South Gippsland's residents was exactly at the mid-point: 50.

Council representatives registered an average of 59. The local business community rated an average score of 55, with the extreme anti-Prom view (0 on the aforementioned scale) registering 4.1% and a significant 10.2% supporting total Prom focus (100 on the scale). All things considered, the average stakeholder is mildly in favour of branding that revolves mostly around the Prom.

### Expert observations

Objectively, these findings are enough to recommend that calls for changing the brand name be acknowledged but denied. The evidence supports maintaining the Prom Country brand. Expert observations on brand and marketing make the recommendation even more compelling.

Wilsons Promontory remains a key icon underpinning the South Gippsland brand. Research proves that natural beauty—centred on the Prom—is South Gippsland's core appeal to visitors, residents and many businesses. While direct monetisation of these nature-based attractions is a challenge, their powerful pull should be harnessed rather than smothered. The Prom Country brand name effectively leverages this high level of recognition and appeal.

Prom Country is a brand name with equity in the bank. Changes to brand name would diminish or erase that. There's no compelling reason to spend this time-earned brand equity on magic beans, particularly when the data shows that strategically the current brand remains right on the money.

Finally, the cost of developing or adapting a different brand would be significant. Without strong objective evidence showing that such a change would produce better outcomes, a conservative strategy is preferable.

**It is recommended that the *Prom Country* brand name be maintained.**

Projected expense: Nil

## 2. Protect the *Prom Country* brand name

Registering a trademark provides legal protection to a brand and its assets.

IP Australia's ATMOSS database confirms that the *Prom Country* brand name is currently unprotected.

South Gippsland Shire Council did lodge an application to protect the word mark *Prom Country* in April of 2002. However, the lapse of that application was advertised in November of 2003. Therefore, the trademark was never registered.

Presently, there appear to be no words registered on the ATMOSS database that are so similar to the *Prom Country* brand as to be an issue.

**On the above-listed bases, it is recommended that the *Prom Country* brand name be formally registered as a trademark with IP Australia.**

*Projected expense:* \$500+

## 3. Maintain the *South Gippsland* brand name

While it is evident that *South Gippsland*, as a brand name, holds less cache outside of the Shire, it must be acknowledged that it is primarily an internal-facing brand.

In the context of its own constituents and of governance bodies, the meaning and boundaries of *South Gippsland* are well acknowledged. There are few-to-zero cogent factors that would justify the expense (financial and reputational) of a name change.

**It is recommended that the *South Gippsland* brand name should be maintained for intra-shire usage.**

*Projected expense:* Nil

## 4. Clearly delineate where and when *Prom Country* and *South Gippsland* are appropriate

The preceding recommendations entail a balance between the maintenance of two separate brands for two separate purposes:

- *South Gippsland* is the inward facing governmental brand
- *Prom Country* is to be the brand that represents the region to external audiences.

Along with this recommendation that the *Prom Country* brand is to be used for an increasing breadth of communications made to audiences outside the shire, it will be important to clearly delineate which brand representations should be used in precisely which contexts.

**It is recommended that the operational domains for the two main brand names be clearly defined and made clear to all relevant parties.**

## 5. Maintain the *South Gippsland Shire Council* logo, but for internal audiences only

As the central visual tenet of the internal-facing brand, the *South Gippsland Shire Council* logo is reasonably popular and rates consistently.

It is worth mentioning that a poll of people from outside the shire found that unprompted associations with the logo were not particularly in-line with the brand virtues. Further, while 10.1% of those respondents managed to successfully associate it with *South Gippsland*, a further 5.2% of people thought it represented *Lakes Entrance* or the *Lakes Region*. This level of misrecognition is significant and could be a problem if the brand is to be promoted outside of the shire.

Nevertheless, support for maintenance of the logo is high within the shire. While new residents—those who have lived here for 5 years or less—seem to prefer a different aesthetic, most other polled groups acknowledge it as the leading internal representation of the shire. It is reasoned that the new resident cohort may share some of the aesthetic connotations that were noted among the visitor market, whereas residents of longer standing are likely to look past those concerns and project pre-existing associations onto the brand's identity. For the moment, it appears that those pre-existing associations are strong and positive enough so that approval remains high.

**Therefore, it is recommended that the South Gippsland Shire Council logo be maintained in its current form, but used only for intra-shire branded communications and intra-governmental communications only.**

It is further recommended that the *Prom Country* brand be strongly considered as the preferred visual identity for communications targeting a non-governmental external audience.

*Projected expense:* Nil

## 6. Establish an alternative to the *Southern Gippsland* brand

The continued use of *Southern Gippsland* as a brand name for co-operative ventures has the potential to detract from the effectiveness of the *South Gippsland* brand.

In terms of pure perception and online search engine confusion, these two brand names are too close to each other. Both semantically and morphologically, their similarity is a problem. Any traction gained by one of the brands is likely to come at the expense of the other.

Nevertheless, it is recognised that promotional partnerships with Bass Coast Shire can be beneficial. Co-operation should certainly be maintained.

**Therefore, it is recommended that an alternative brand name be developed for co-branded ventures between South Gippsland and Bass Coast Shire.**

*Projected expense:* \$4,800+ (shared with Bass Coast Shire)

## 7. Simplify and protect the *Prom Country Regional Tourism* brand name

Prom Country is not a registered trademark.

Nor is Prom Country Regional Tourism a registered business name. While it does hold an ABN with the Australian Business Register, this is not the same as having a business name registered with ASIC.

While it is recommended that these protections be obtained, it is *first* recommended that consideration be given to simplification of the brand name.

It is noted that *Regional* in the name is redundant—it adds nothing in support of brand virtues nor in support of any competitive prerogative.

Further, use of the *regional* in the name may lead to stakeholder confusion with regards to the *Regional Tourism Board*, which is properly Destination Gippsland.

So, while the brand name might more correctly be *Prom Country Local Tourism*, the addition of the word *local* is acknowledged as merely another redundancy.

Therefore, it is suggested that the organisation look at transitioning to trade as *Prom Country Tourism*.

Such a change would necessitate a minor change to the typography that accompanies the logo. Current campaign collateral need not be replaced. Rather that the amended name should be phased in with future materials.

Once simplification is effected, the name should be properly registered as both a business name (with ASIC) and—if deemed necessary—a trademark (with IP Australia).

**It is recommended that the PCRT brand name be simplified and registered as a trademark and as a business name.**

Projected expense:     \$1,000+ (logotype amendment)  
                                     \$500+ (trademark)

## 8. Maintain the *Prom Country Regional Tourism* logo

Even without the accompanying words that clearly identify it, the Prom Country Regional Tourism logo polled strongly and consistently with stakeholders. Although only recognised by just over 1/3<sup>rd</sup> of visitor market respondents, the qualitative responses regarding brand associations with the logo were on target for the brand's flagship virtue of *natural beauty*.

This shows that both the style and content are hitting the right notes. If any amendments are to be made in future, they may strive to integrate other strategic brand virtues into the visual identity, but this is currently deemed a low-priority given the relatively strong appeal of the current logo.

**It is recommended that the PCRT logo be maintained.**

Projected expense:     Nil

## 9. Reconsider the Prom Country Regional Tourism tagline

The current tagline used by Prom Country Regional Tourism—*Simply beautiful...naturally*—may be improvable, to project the diversity of the South Gippsland offering.

While the flagship virtue of natural beauty is well represented, none of the other brand virtues are not connoted by the current tagline.

**It is recommended that a new tagline should be considered, with the objective of better serving the full breadth of the brand's virtues.**

*Projected expense:* \$1,920+

## 10. Update or establish brand guidelines

Both PCRT and South Gippsland Shire Council should have up-to-date, professionally developed brand guidelines to keep their communications activities on track. To achieve the desired outcomes, a great deal of importance must be placed on the consistent and correct application of the brand assets and the expression of the brand virtues.

The scope to develop brand guidelines could vary significantly depending on the method and agency selected, and the success with which other report recommendations are implemented. If additional research and analysis is deemed necessary, costs could be high. If council approves developing the guidelines based on the research of the present project and makes use of existing extrapolations reported upon herein, costs may be kept low.

**It is recommended that brand guidelines be developed to guide the implementation of both Prom Country and South Gippsland brands**

*Projected expense:* \$6,000+ per set of guidelines (written), rising to \$10,000 - \$15,000 + per set of guidelines (including graphic application templates)

## Promotional Recommendations

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### 11. Adopt and emphasise the brand's 8 key virtues

It is recommended that future promotions for **both** the *Prom Country* brand and the *South Gippsland* brand emphasise the eight key virtues identified in this report.

All branded communications should strive to espouse the inherent brand virtues and abstract brand virtues:

- **Natural beauty**—the flagship virtue, and #1 inherent virtue
- **Accessible to Melbourne**—#2 inherent virtue
- **Welcoming**—#1 abstract virtue
- **Relaxing**—#2 abstract virtue.

Further, all branded communications should strive to promote at least one of the four monetisable brand virtues:

- Good food and fresh produce
- Good value accommodation
- Quaint character of towns and villages
- Outdoor activities.

**It is reiterated that this should apply to both the *Prom Country* brand and the *South Gippsland* brand.** It is important that they come together in representing the virtues of the region effectively, lest each undermine the message of the other.

*Projected expense:* Nil, if adopted as per the recommendations herein

#### **Flagship brand virtue & inherent brand virtue #1: *Natural beauty***

South Gippsland's abundance of natural beauty is the bedrock of the regional brand. The data reported herein clearly indicates that it remains a major attraction for visitors, for new residents and even for business.

As the flagship virtue, natural beauty is not something that needs to be sold to the audience—it is something that *sells* South Gippsland to the audience.

**It is recommended that *natural beauty* be acknowledged as the flagship brand virtue and used to strategic effect throughout all branded communications.**

#### **Inherent virtue #2: *Access to Melbourne***

South Gippsland's convenient proximity to Melbourne is consistently rated as a key attractive quality for all three of the shire's economic development target streams: visitors, residents and business.

**It is recommended that *Prom Country*'s easy access to and from Melbourne be emphasised throughout branded communications.**



## Key Abstract Virtues: A welcoming and relaxing atmosphere

Abstract virtues help to shape *emotional* and *attitudinal* perceptions of the brand in such a way that the brands appeal is enhanced and—importantly—the established expectations can be well delivered by the destination.

**It is recommended that South Gippsland's abstract virtues—*welcoming and relaxing*—should be a core tenet of future marketing activities.**

## Monetisable virtues

Monetisable virtues are factors that appeal to a target market and which can directly lead to commercial benefit.

## Good food and fresh produce

Good food and fresh produce has been identified as a key monetisable virtue for the Prom Country brand. South Gippsland excels at it. Research show that it is highly desirable to the visitor market. It is the leading activity of overnight visitors throughout the Gippsland region. The *clean, green and fresh* ethos has been identified as of keen importance to overseas investors.<sup>151</sup>

Emphasising South Gippsland's existing strengths in food and fresh produce will promote Prom Country's small producers and benefit the major industries of manufacturing (particularly dairy) and agriculture. Further, promoting wider perceptions of South Gippsland as a noteworthy food tourism destination will help build seasonal resilience and mitigate overreliance on natural attractions for visitation. If successful it may translate into employment growth and real economic development.

**It is recommended that good food and fresh produce be emphasised in some if not all future branded communications.**

## Good value accommodation

Research finds that South Gippsland's target markets place a priority on good value ahead of luxury when selecting accommodations. 45% of visitor market respondents rated value accommodation among their top 3 priorities for travel. This rating rises to equal first (51%) if one isolates the cohort who are interested in visiting South Gippsland but have not yet done so.

Despite South Gippsland having many good value accommodations, only 13% of the visitor market perceive value accommodation as a major feature of the region. An increased emphasis on good value accommodation may turn these *interested* consumers into *actual* visitors.

New residents moving to South Gippsland tell a similar tale: lower housing costs are rated as key saleable quality of South Gippsland as a place to live.

**For these reasons, it is recommended that good value accommodations and housing be emphasised in some if not all future communications.**<sup>152</sup>

<sup>151</sup> Consultation with SGSC: April-June 2016.

<sup>152</sup> Of course, there remains a place for high-end, luxurious accommodations within the shire—but they are not a promotional priority for the brand at this time.



### Quaint character of towns and villages

The visitor market and new resident cohort see the quaint character of towns and villages in South Gippsland as an attractive quality.

The quaint character of Prom Country villages and townships positions them well to capitalise on Visit Victoria's current regional strategy — to inspire Melburnians to rediscover and reconnect with Victoria's regions.

Further, the virtue is readily monetisable. Unlike visiting a nature-based attractions, where direct monetisation is negligible (take as an example the 12 Apostles – despite the enormous visitation and iconic status, the average tourist stays less than 40 minutes and spends just 18 cents<sup>153</sup>), when people visit a village or a town, they are likely to shop, dine or stay.

From a visitation point of view, it brings outside money into local cafés, restaurants, galleries and the like. From a resident and business point of view, casual visitation is an opportunity for potential discovery of a desirable place to live or establish a business.

**It is recommended that the quaint character of towns and villages be emphasised in some if not all future branded communications.**

### Outdoor activities

Outdoor activities were consistently rated highly as a saleable feature by visitors, residents and business..

Asked to evaluate the most attractive features that are already present in South Gippsland, the visitor market rated *outdoor activities* as third, behind only *natural beauty* and *beaches*.

Likewise, the majority of businesses also agree that *outdoor activities* are a major drawcard (53%)—the second highest ranked feature in the poll.

When residents were asked what makes South Gippsland a great place to live, outdoor activities featured third (46.8%).

Despite not being the outright winner for any segment, the commercial viability and consistently high ratings make outdoor activities a strong monetisable virtue for South Gippsland.

**It is recommended that the outdoor activities be emphasised in some if not all future branded communications.**

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<sup>153</sup> Jean Edwards. *New lookouts at Twelve Apostles part of multi-million-dollar makeover*. ABC News: 2016.

## 12. Leverage State Campaigns to promote daytrips and short getaways

As reported in *Victoria's 2020 Tourism Strategy* (State Government of Victoria, 2013):

Domestic holidays have already seen a significant decline in perceived value for money and subsequently length of stay has declined. Domestic travel within Victoria is more likely to be a short trip, rather than a longer holiday. (p.9-10)

It is increasingly difficult to sell regional Victoria as a holiday destination. Visit Victoria have, for their part, recognised this challenge and taken a strategic focus on promoting regional Victoria for daytrips and 'get-out-of-the-city' overnight trips.<sup>154</sup> These findings are the basis for Visit Victoria's current flagship marketing campaign, [Wander Victoria](#). It is likely to continue to inform Visit Victoria's marketing strategy over coming years.

South Gippsland, by way of the unique virtues identified in this report, is well positioned to leverage Visit Victoria's strategic direction. Being close to Melbourne, boasts great food and fresh produce that can be enjoyed amid jaw dropping scenery and in quaint, authentic villages.

The opportunity is ripe for marketing that targets the weekend day-trippers from Melbourne, particularly over the cold winter months. As such, it is an excellent opportunity to start building seasonal resiliency.

**It is recommended that South Gippsland actively and aggressively promote daytrips and short getaways in select future marketing materials.**

*Projected expense: Wholly dependent on type, scale and intensity of campaigns*

## 13. Target Repeat Visitors

A significant portion of South Gippsland visitors are repeat visitors. In fact 64% of those surveyed had visited 5 or more times.

76.8% of respondents stated a definite intention to visit South Gippsland within the next 2 years. 22.1% said maybe, with only 1.1% saying they would not.

**It is recommended that return visitors should be targeted with the strategic objectives of shortening the period between visits, and increasing the monetisation of their next visit by focusing on the four identified monetisable South Gippsland virtues.**

*Projected expense: Wholly dependent on type, scale and intensity of campaigns*

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<sup>154</sup> Consultation with Visit Victoria: April-June 2016.

## 14. Use precisely targeted online campaigns to increase visitation from internationals

Combining three key pieces of information, targeting a select group of internationals may lead to an increase in visitation.

The UK is the source of South Gippsland's second largest international visitor group, but they stay longer than the largest group (Germans). This means that the *return per acquisition* is higher for British internationals than any other statistically significant international visitor group.

Visitors from the UK can be expected to know English and therefore can be reached with the same English language promotions that are used for the domestic market.

Close to 86% of international visitors to South Gippsland are either unaccompanied or travelling with a partner.

**It is recommended that South Gippsland use highly-targeted online campaigns—designed to appeal to singles and couples—to reach-out directly to British tourists who are already in Australia.**

*Projected expense: Wholly dependent on campaign scope and intensity*

## Online Recommendations

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### 15. Refine the Prom Country app

As highlighted in the SWOT analysis, the Prom Country app is an opportunity—it could be a great asset to the Prom Country brand. It's already functional and reasonably comprehensive, but it is lacking in two key elements:

- Strategic emphasis on content and imagery that project the flagship and abstract virtues.
- User experience design (UXD) that funnels users towards on-brand saleable features (i.e. the monetisable virtues of good food and fresh produce, good value accommodation, outdoor activities and quaint villages).

The landing screen should feature the gorgeous natural imagery that is Prom Country's flagship virtue—and supported by a selection of images that promote food & produce, accommodations quaint villages and outdoor activities.

The full colour Prom Country logo and its colour scheme should feature throughout the app.

Further, the UXD should put food and produce, outdoor activities, accommodation and quaint villages upfront. The copy for all should be evaluated specifically for strategic brand effectiveness and redrafted if necessary.

**It is therefore recommended that the Prom Country app be refined.**

*Projected expense: \$3,000+ (May vary significantly depending on existing web assets, technical specifications and back-end requirements.)*

## 16. Establish a social media content strategy

PCRT should use social media strategically. As observed by Tourism Victoria:

Consumers no longer want to simply view information. They want to interact and share their experiences through social media. This trend is likely to continue which will result in less focus on destination websites and more emphasis in interacting with the social media community.<sup>155</sup>

When it comes to social media, success is the sum of small efforts repeated every day. It is achieved by identifying strategic goals and plotting a clear pathway to reach them.

Content must be structured to consistently and effectively project all of Prom Country's brand virtues.

The social media content strategy should be built upon close and consistent collaboration with local industry, with a specific focus on expanding perceptions of Prom Country as a destination with more to offer than Wilsons Prom.

There should be care taken to ensure that content includes and represent all Prom Country sub regions. Diversity of products and offerings should be embraced, as long as they can be promoted by executions and content that tick the brand virtue boxes (gorgeous natural imagery, a welcoming and relaxing feel, constant reminders of proximity to Melbourne, specific focus on food, accommodation quaint villages and outdoor activities).

**It is recommended that PCRT should develop a social media content strategy to productively and consistently guide social media efforts towards well-defined goals.**

*Projected expense: \$7,000+ (if externally developed)*

## 17. Focus on Facebook

Visitor research has shown that Prom Country's existing market uses Facebook more than other social media platforms.

84.3% of visitor market respondents said that they use Facebook in their everyday life.

**On this basis, it is recommended that Facebook should assume strategic primacy as the delivery platform for social media content aimed at Prom Country's existing market.**

*Projected expense: Nil*

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<sup>155</sup> State Government of Victoria. *Victoria's 2020 Tourism Strategy*. Melbourne: July 2013. p 9-10.

## 18. Integrate Instagram into Facebook efforts

Instagram presents three opportunities that make it a worthwhile addition to the Prom Country social media strategy:

- Instagram can be used as an on-brand content creation platform that feeds into Facebook
- Instagram can help strengthen strategic ties and foster reciprocity in cross-promotion with Destination Gippsland
- South Gippsland can leverage Destination Gippsland's well-developed existing audience reach, both on Facebook and on Instagram itself.

Being owned by the same corporation, Facebook and Instagram integrate seamlessly. Once relevant accounts are linked, Instagram content can be shared to a Facebook page with a single click.

As a destination brand with a flagship virtue of natural beauty, Instagram—which is above all a visual medium—is tailor made for the dissemination of on-brand social media content. It can serve as a powerful content generation tool for Facebook, while reaching new audiences via Instagram itself.

Further, strategic activity on Instagram can leverage Destination Gippsland's considerable reach (more than 20,000 likes on Facebook, more than 8,500 followers on Instagram) for South Gippsland's benefit. This can be achieved by making it a policy consistently use Destination Gippsland call-to-action hashtags (#inspiredbygippsland, #visitgippsland) in conjunction with PCRT's own local call-to-action hashtags (for example: #visitpromcountry).

Destination Gippsland frequently shares content tagged as such via their own social media channels. In fact, as shown on their own Instagram page (accessed 28 June 2016) they specifically call for users to take advantage of this promotional method.

Taking such will strengthen regional reciprocity and strategic ties with Destination Gippsland, as well as boosting South Gippsland's reach to a new and wider audience.

**On this basis, it is recommended that PCRT integrate Instagram into their Facebook—and wider—social media efforts.**

*Projected expense: Nil*

## 19. Encourage TripAdvisor for businesses

76% of South Gippsland visitors surveyed use TripAdvisor for planning their trips. Maintaining accurate and well-manage TripAdvisor listings, as well as responding to TripAdvisor reviews is crucial to maintaining control of the South Gippsland brand's online reputation

As such, PCRT should encourage local businesses to take a proactive approach to TripAdvisor. Business operators should be actively encouraged to claim their business listing, if they haven't already done so. They should likewise be encouraged to take a proactive approach to responding to their reviews.

It is also recommended that PCRT itself take an active approach to claiming and managing the listings and reviews of South Gippsland natural attractions, to ensure quality and brand consistency.

It is noted that PCRT has previously recognised TripAdvisor's importance to the regional branding landscape, hosting a series of information sessions for their members in 2015.

**It is recommended that efforts to educate, encourage and motivate local business to actively use TripAdvisor should be enthusiastic and ongoing.**

*Projected expense:* Nil

## 20. Invigilate against social media brand-jacking

To avoid potential risks to South Gippsland's online brand reputation, it is recommended that all social media profile names with a clear association to *South Gippsland* and/or *Prom Country* are secured, either by South Gippsland Shire Council or Prom Country Regional Tourism. This should be done across all major social media networks—regardless of whether the accounts will be actively used—simply to preclude potential competitors or *brand-jackers*.

Unauthorised social media accounts with great similarity or relevance to the Prom Country brand also present a reputation risk. These include all variations resembling *Prom Country*, *Prom Country Regional Tourism*, *PCRT*, *South Gippsland*, *South Gippsland Shire Council*, *SGSC*, *Visit Prom Country*, and *Visit South Gippsland*, among others.

**It is recommended that all usernames that are clearly associated with core brand names be secured on all major social media networks.**

*Projected expense:* Nil

## 21. Commercially sensitive

The objectives of recommendation 21 could be impeded by premature publicity. On this basis, it has been omitted from the present draft.

## Organisational Recommendations

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As regards organisational recommendation, there is one finding of this project that bears particular emphasis and context.

The RTB-LTA relationship is predicated on cooperation and mutual support. Among other things, RTBs are designed to be the regional conduit between local industry, local tourism associations and Visit Victoria. Destination Gippsland is the link in the chain that connects South Gippsland to Visit Victoria. They are the conduit by which South Gippsland transmits influence to the top-tier Victorian campaigns.

However, PCRT and Destination Gippsland have become disconnected. And, with that link removed, South Gippsland has effectively lost its voice not only in Gippsland, but in the wider Victorian context as well.

Both PCRT and Destination Gippsland seeks buy-in from local operators, many of whom can only afford—or see value in—a single outlay.

That means that South Gippsland currently faces a situation whereby their local tourism association and their regional tourism board are effectively in competition with one another.

This is not by definition a systemic problem, as similar systems have been shown to work efficiently in other regions.

As an absolutely critical priority, the connection between PCRT and Destination Gippsland must be repaired.

The recommendation that follow are aimed at improving these outcomes by way of:

- alleviating competition drivers between PCRT and Destination Gippsland
- freeing up the capacity in both organisations to achieve strategic objectives
- improved strategic planning
- increased management confidence and stability of operations.



## 22. Fund PCRT with the full allocated budget

Having a proportion of its budget guaranteed from the outset would free-up the organisation to better achieve its strategic objectives.

Presently, the PCRT is funded through a combination of membership fees and fee matching by South Gippsland Shire Council. It is understood that fee matching is budgeted up to roughly \$60,000 and that those monies are held in reserve by the council throughout the year. In recent years, roughly two-thirds of those monies have ended up going towards PCRT.

Given this budget structure, PCRT faces significant uncertainty about its annual budget. To mitigate this uncertainty, PCRT is obliged to devote an inordinate amount of resources to promote the benefits of membership to prospective members.

It would be preferable, of course, for these resources to be spent promoting South Gippsland to the world. Success on that field should in turn attract greater membership.

**It is recommended that South Gippsland Shire Council make the full allocation of funds accessible to PCRT, without being contingent on fee matching.**

*Projected expense: No additional expense beyond current budget allocations*

## 23. PCRT to expand multi-tiered membership

Currently, the PCRT membership package offers a base membership rate, with a number of upsells that include brochure advertisements.

A wider range of industry/business-type-specific membership packages may help attract more members.

Rather than offering a single catch-all membership level with up-sells for brochure advertisements, more success may be found by restructuring membership packages to cater to specific needs.

At the entry level, a very basic and inexpensive *PCRT Supporter* membership package may include just the bare basics (newsletter, supply of PCRT brochures for their business, invitation to networking and industry development events).

Above that, there could be business-segmented packages for retail businesses, tourism operators, B&B/Self-contained, and all the way up to large-scale accommodations.

Each membership level should offer its own specific benefits to match the target-segment's needs and priorities—and it should have a price-point to match.

With greater flexibility and tailoring of services to members, PCRT membership may have a greater appeal to as-yet unregistered businesses.

### **Package ATDW listings with premium membership packages**

It has been found that there is some general confusion amongst local operators with regards to the \$250 fee that businesses are required to pay to become listed with the Australian Tourism Data Warehouse (ATDW). As a result, its local promotion and uptake is very low.

However, the listing is important: it is essentially required if a particular business is to benefit from Destination Gippsland's ongoing online campaigns.

There would likely be a collective benefit for all businesses in South Gippsland if more businesses were encouraged to list with the ATDW. Not least that buying such a listing also means that a business may reap extra benefits from Destination Gippsland campaigns.

To further encourage uptake among South Gippsland businesses—beyond education over the actual benefits of the ATDW listing— PCRT should negotiate with Destination Gippsland to get a discounted rate on ATDW listings for PCRT members. Destination Gippsland receives the funds for each listing sold to South Gippsland businesses, therefore it is theirs to remunerate at their discretion. If it encourages additional uptake of the listings, an arrangement like this may reasonably be expected to benefit all parties.

**On this basis, it is recommended that PCRT should include discounted ATDW listings with premium membership packages, and promote it as an up-sell to cheaper membership packages.**

## **24. Develop an MOU between PCRT and Destination Gippsland**

PCRT and Destination Gippsland would both benefit from the clear definition of roles, responsibilities and accountabilities. If the two organisations begin working in tandem rather than in competition, South Gippsland's visitation promotions will benefit.

It is recommended that South Gippsland Shire Council should mediate the development of Memorandum of Understanding (MOU) between the two parties. The MOU should formally define the parameters of each organisations operation, limit their ground for competition, and foster their genuine cooperation.

Without becoming overly prescriptive, it is envisaged that the MOU should contain agreements pertaining to:

- PCRT promoting Destination Gippsland services to its membership base
- Destination Gippsland's baseline promotion of South Gippsland according to some defined parameters
- Fee sharing for ATDW listings that come through PCRT

**It is recommended that PCRT and Destination Gippsland agree upon an MOU that limits competition and fosters co-operation.**

## 25. Develop an MOU between South Gippsland Shire Council (or the GLGN) and Destination Gippsland

According to consultation with Destination Gippsland, their responsibilities are defined by a service agreement with the GLGN. While Copy Transmission has not been provided with this document, it is understood to contain broadly stated activities, objectives and strategies. It does not, however, include specific key performance indicators or accountabilities towards guaranteeing a return on investment. Nor does it define in specific the nature of co-operative activity with respect to local tourism associations.

South Gippsland Shire Council funds Destination Gippsland with approximately \$30,000 annually.

**It is recommended that Destination Gippsland's service agreement with the GLGN councils be redrafted such that council funding is contingent upon the achievement of clear and measurable key performance indicators.**

Acknowledging that South Gippsland cannot act unilaterally on matters requiring GLGN co-operation, a secondary recommendation is provided.

**It is recommended that South Gippsland Shire Council establish an MOU with Destination Gippsland that details reliable metrics for the achievement of strategic objectives.**

## 26. Foster closer ties within neighbouring shires

It is acknowledged that South Gippsland Shire Council and Prom Country Regional Tourism have close and productively cooperative relationships with some neighbouring shires, local tourism associations and businesses.

Findings of this project indicate that there may be further opportunity to capitalise on shared markets. Specifically, for the visitor market, Phillip Island and Lakes Entrance are commonly considered to be associated with the South Gippsland experience.

This shows that South Gippsland has something to offer these two external destinations in a marketing partnership, and vice versa.

**It is recommended that South Gippsland seek marketing alliances and partnerships in the neighbouring shires.**

*Strategy Suggestions:* The #1 activity for both overnights and day-trippers for broader Gippsland is Food & Wine.<sup>156</sup> South Gippsland, however, lags behind in this regard. When formulating strategies for cross-promotional opportunities with regional partners, a focus on food and produce may raise awareness and achieve greater monetisation of this virtue. This, of course, is already in evidence with previous collaborations with Bass Coast Shire.

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<sup>156</sup> Austrade. *Gippsland Tourism Demand 2015*. Canberra: 2015.

## 27. Undertake a local product gap analysis

The strength of a brand is not *entirely* in its representations, but also in how they relate to the core offerings.

During the consultation phase, particularly with representatives of Regional Tourism Boards from around Victoria and Visit Victoria itself, that product development is often just as important, if not more so, for the growth of a regional brand than direct marketing efforts.

Acknowledging that South Gippsland's tourism and economic development team is likely already active in this space to a degree, it is recommended that South Gippsland should undertake a specific regional product gap analysis to evaluate how well it practically fulfils each of the key expectations and wants of its target market.

Emphasis should be given to addressing the issue of seasonality of visitation, identifying in specific which products should be further developed in order to increase visitation over the colder, wetter months.

On the basis of those findings, South Gippsland must take strategic steps to fill any gaps in the product offering in such a way that it will support and supplement core attractors.

*Projected expense:* \$19,200+

## 28. Actively support a flagship *lodge* development adjacent to Wilsons Prom

Findings revealed that a flagship development is currently in the early planning/investment-seeking stages (<http://promwildernesslodge.com.au/>).

Apart from being a major monetisation point in its own right, such a lodge would be an impressive opportunity to sell the experiences available elsewhere in the Shire.

It is also likely to:

- make a positive impact on many satellite businesses
- help attract further investment to the region
- help to further diversify South Gippsland's tourism offering, particularly in the prestige/luxury category
- Help attract more international visitors.

**This report lends its full support to such a development and recommends that it be publicly supported by South Gippsland Shire Council.**

## Grass-roots Engagement Recommendations

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One of the most significant challenges for Victorian regional destinations is effectively engaging and integrating local industry into the wider destination marketing framework.<sup>157, 158, 159, 160, 161, 162</sup>

The challenge is of particular significance to South Gippsland. Extensive industry consultation identified the need to engage the participation of a larger proportion of local businesses in South Gippsland's destination marketing efforts.

To tackle this challenge, the following recommendations aim to do the following:

- Empower local industry to make informed regional marketing decisions
- Strengthen existing relationships and build new relationships between PCRT/SGSC and local industry
- Define sub-regional identities and identify sub-regional industry priorities and opportunities
- Engender as sense of ownership in the Prom Country brand among sub-regional industry

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<sup>157</sup> Consultation with Visit Victoria: April-June 2016.

<sup>158</sup> Consultation with Great Ocean Road Regional Tourism: May 2016.

<sup>159</sup> Consultation with Grampians Tourism: June 2016.

<sup>160</sup> Consultation with PCRT: April 2016.

<sup>161</sup> Consultation with Grampians Tourism Destination Gippsland: April-June 2016.

<sup>162</sup> Consultation with SGSC: April-June 2016.

## 29. Support local business engagement with information

Misunderstandings about the roles of various bodies within the destination branding network may be a root cause of dissatisfaction and disengagement exhibited by some businesses and stakeholders.

While the above-listed recommendations may go some way towards rectifying that situation, the simplest way to address it head-on would be for council to run a straightforward informational campaign. Such a campaign should provide an unbiased perspective on the destination branding framework and the ways in which local businesses can participate in it.

Such an informational campaign would ideally consist of an online hub supported by basic promotional materials.

**It is recommended that local business engagement be promoted by way of one or more destination branding information campaigns.**

*Expenses associated with an informational campaign of this sort largely depend on the scale to which it aspires and the extent to which council's internal resources participate in its execution.*

## 30. Provide workshops to empower community-led groups to develop their own sub-regional destination brands

Each locality within South Gippsland has its own strengths, its own industries and its own priorities. As stakeholders, those regions will more actively engage with the Prom Country brand if they can effectively express their own identities within the framework provided by the Prom Country master-brand.

As a strong step towards community-led empowerment, facilitated workshops offer a straightforward and accessible means of engaging sub-regional perspectives, expertise and priorities.

Workshops should have two goals:

- educate participants about
  - principles of destination marketing
  - resources and bodies at their disposal, and
  - how the pieces fit together
- provide participants with an opportunity to self-determine and articulate their sub-region's strengths, priorities and character, as they sit under the umbrella of the wider Prom Country identity.

In effect, this second point is a means to help establish clearly articulated sub-regional brands that serve the overarching whole.

**It is recommended that PCRT and South Gippsland Shire Council partner to provide facilitated workshops to community-led groups.**

*Projected expense:                      Internal resources &  
\$3,600+ per workshop (facilitated by external experts)*

### **31. Engage community-led groups to strategically participate in the destination branding framework**

The above-mentioned workshops will help foster a local industry community that is meaningfully invested in seeing the South Gippsland brand succeed.

However, this investment must be nurtured over time. Local industry must be consistently guided to properly integrate within the overarching framework. They must be consulted and encouraged to co-operate towards an integrated Prom Country brand that effectively promotes the core brand virtues.

**It is therefore recommended that PCRT establish direct and regularly scheduled liaisons with each of South Gippsland's key sub-regional groups.**

### **32. Co-ordinate sub-regional brands under the Prom Country master brand**

Each sub-regional brand (as defined in by the outcomes of the activities in the preceding recommendations) should be incorporated into the master Prom Country brand under the coordination of Prom Country Regional Tourism.

This should include—but not be limited to—providing a platform via the [www.visitpromcountry.com.au](http://www.visitpromcountry.com.au) website whereby sub-regions may actively promote their sub-regional brand online in a way that fits snugly into the overarching Prom Country brand.

Of course, this would need to be accompanied by guidelines prescribing appropriate content and usage. It should also include consulting with and feeding-back guidance on promotional priorities and tourism strategy.

**It is recommended that all of the sub-regional brands within South Gippsland be integrated with the Prom Country master brand and co-ordinated by PCRT.**

#### **A note on Tarwin Valley:**

*It is acknowledged that Tarwin Valley has already undertaken a branding process. The effort, expertise and expense invested in this project should not be squandered. Instead, every effort should be made to incorporate Tarwin Valley's efforts into the broader Prom Country brand.*

*As such, it is recommended that the Tarwin Valley group be invited to educate PCRT and South Gippsland Shire Council about the Tarwin Valley brand.*



### 33. Allocate visitpromcountry.com.au sub-domains to community-led groups

While empowering community-led groups to distinguish their sub-regions as a part of the destination branding framework, it will be important to maintain cohesions and to mitigate destructive competition, especially in the online space.

To facilitate constructive co-operation, ensure adherence to the core brand virtues and take advantage of economies of scale, visitation-targeted web presences can be united under the current visitpromcountry.com.au website.

Augmenting the current site structure with a series of sub-domains (or sub-directories)—one for each engaged community-led group—will provide an efficient way for those groups to establish an effective online presence.

Community-led groups may in this way be given the freedom to manage their own online identities within the scope of simple rules established by Prom Country Regional Tourism.

Unified and strategically aligned web-presence may be guaranteed by the use of a content management system that allows for the application of common templates, multi-site networking and super-admin permissions vested with Prom Country Regional Tourism.

**It is recommended visitpromcountry.com.au sub-domains be created to integrate professional-level online presences for sub-regional destination brands.**

*Mirboo North pilot project: It is understood that PCRT is currently undertaking a project in partnership with Mirboo Country Development that may serve as a pilot for a broader roll-out of this strategy. The nature of the co-operative project—an integrated website—is a perfect testing ground. If it is successful and efficient, its expansion to all other community-led groups and their sub-regions is highly recommended.*

*Projected expense: Depends largely on existing web site back-end and administrative arrangements. Initial technical support and the sharing of common templates—ready to be populated with content—could be achieved for \$2,400+*





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