LEADERSHIP
Great South Coast

Gateways to Growth
A Great South Coast Food and Fibre Agri-tourism Project

Prepared for
Great South Coast Food & Fibre Council

food+fibre
GREAT SOUTH COAST

Prepared by
Ben Fraser, Anthony Dufty, Brad Collins & Ashlee Scott

Introduction

Propelled by the economic imperative to continue to grow food and fibre output from our region's businesses, this paper aligns to and supports the Great South Coast Food and Fibre Action Plan to leverage agri-tourism as a key driver in the growth of our food and fibre industry.

A conceptual plan for tourism gateway signage including recommended locations, cost options, design, manufacture and installation across five council regions

Food & Fibre in the Great South Coast

The Great South Coast Food and Fibre Council is working to leverage our agri-tourism, along with the region's rural assets and environment, to create a profitable consumer tourism food and fibre sector that grows local economies, enhances liveability and lifts the region's profile as a premier food and fibre destination.

The agri-tourism sector has the potential to be a regional economic driver in its own right, but just as importantly, it has a role in building the profile and image of the region as a fine food and fibre producer and in showcasing its agricultural powerhouse status.

The Great South Coast tourism sector has two iconic tourism assets in the Great Ocean Road and the Grampians, at the two ends of the Great South Coast Region. With the high visitor numbers to the Great Ocean Road and Apostles, agri-tourism has the potential to attract and retain the region's visitors beyond the day or so they stay today.

Growth of this sector would create significant community value and increase the profile and image of the Great South Coast as a major food and fibre producing region.

The Great South Coast Region has several individual locally based food and agri-tourism trails which have been developed to varying levels which have achieved a significant amount of success. Despite limited resources and local level impact, there is an opportunity to build on this work by:

- improving connectivity and collaboration across the region;
- building of a bigger "story", linking packages with multi-night stays;
- developing a critical mass to develop individual sections as a part of a holistic approach;
- overcoming impediments such as seasonality and poor yields;
- developing a showcase strategy for local food and fibre, gourmet and niche offerings as well as telling a story of the 'greater' industry;
- developing a network and platform for the supply of the region's produce and fibre so visitors can buy.

To do this, the Great South Coast Food & Fibre Council brought together a region-wide group to brainstorm opportunities around agri-tourism, develop linkages and formulate an action plan to provide a strategy for agri-tourism across the whole region.

A survey was then conducted to test these ideas on a wider audience. The resulting plan includes building a network, connecting, marketing and promotion and relies heavily on Great Ocean Road Regional Tourism and Southern Grampians Tourism to guide, align and deliver on the plan. There are two clear and unambiguous goals:

1 To put the whole region on the map as a food and fibre destination and enhance the image and recognition of the region as an agricultural powerhouse – as #1 in Victoria and #2 in Australia for food and fibre output.

2 To increase visitor retention time in the region which will have an economic outcome of jobs and growth for the region's community and operators. Presently, there are some 4 million visitors annually to the Great Ocean Road who spend on average just 13 cents in the region. By providing better retention through a successful agri-tourism plan, the impact on this spend and the community multipliers are significant.

Project Parameters

The Leadership Great South Coast (LGSC) Project Team worked on the first phase of the Council's Agri-Tourism Plan, to provide interactive digital signage that both educates visitors with the story of food and fibre production in the Great South Coast region, and links tourists with agri-tourism providers and existing and future food trails. The project milestones aimed to:

- Investigate interactive digital signage and costing, its likely impact and any alternative options to direct visitors to the region's food trails and agri-tourism providers;
- Explore options around signage and alternative option content;
- Work with Great Ocean Road Regional Tourism and Southern Grampians Tourism to identify gateways for placement of signage/alternative options;
- Work with all five Local Government bodies to obtain planning permits for signage and alternative options.

Stakeholders

Local Businesses

In 2018, the Great South Coast Food & Fibre Council conducted a survey of more than 50 agri-tourism providers and operators in the Great South Coast region. The survey found that the majority of the respondents believed the region's natural beauty, idyllic countryside and picturesque coastline were key tourism draw cards, backed up by the highly-productive agricultural practices and artisan products. Respondents said creating a clearly defined food and fibre trail with recognisable signage and branding would help develop their business. While some producers were supportive of using social media to advertise businesses and products, including a ground-up campaign enabling producers to tell their own story of their product, the development a mobile phone application was not endorsed.

Great Ocean Road Regional Tourism

The behaviour of tourists visiting the Great Ocean Road region are significantly changing. A key focus of regional tourism bodies is to target the type of traveller the region wants to engage with and ensure that industry is telling the story of our region to connect with the conscientious traveller.

It was advised that the region's tourism bodies, together with Regional Development Victoria, do not support static, road side signage, with the State looking to consolidate/decommission the current brown tourist signage.

A mix of marketing platforms, to engage different visitor needs and advances in technology and visitor behaviour, was recommended as an alternatives to signage.

Great South Coast Food & Fibre Council

During the team's initial presentation to the Great South Coast Food & Fibre meeting on 19 August 2019, several stakeholders expressed concerns about focusing on a fixed signage-only solution, echoing feedback from Great Ocean Road Regional Tourism and Regional Development Victoria. One stakeholder questioned the ability to determine the best locations for gateway signage when the content had not been determined. After the presentation, it was suggested that a multi-faceted solution involving several delivery methods, including mobile technology and moving signage, would be a key outcome.

Tourism Gateways

The project was conceived to explore different interactive signage that could enhance tourism across the region as outlined in the parameters of the project. Whilst this could be undertaken in a more scattergun approach, the project team took a view that it would be more strategic to target gateways where tourist traffic was high and where tourists would be most influenced. These gateways were identified early in the project and the term "Gateways to Growth" was conceptualised. The following gateways were identified based on the number of visitors to the attraction, coverage of geographic range, association with other tourist attractions in the area and spread for regional inception.

Royal Mail Hotel, Dunkeld

Timboon Distillery, Timboon

Nelson Kiosk and Post Office, Nelson

Cheeseworld, Allansford

Flagstaff Hill, Warrnambool

The Wharf, Port Fairy

Visitor Information Centre, Halls Gap

Interactive Signage

After identifying the gateways, a review was conducted of what interactive signage would be most appropriate. The types of signs include mobile, fixed digital and an interactive digital kiosk.

Mobile Signs

While a static digital billboard measuring 5m x 3m costs $88,000 to build and install, a more cost-effective method would be a mobile trailer-mounted screen.

A 4.8m x 2.4m mobile trailer-mounted billboard costs approximately $48,000.

An advantage of a trailer-mounted screen is that users don't require a permit to use in public and can be moved from location to location as needed.

The mobile billboard can be placed on key traffic routes, and advertise key messages to the public as necessary.

The mobile trailer-mounted billboard can advertise several local producers, tourist destinations, events and/or websites at once. On weekends, when the billboard is not in use, it can be hired out privately, creating a commercial income.

Fixed Digital Signs

There are several different brands and models for fixed interactive signs. Yarra Ranges Tourism have engaged technology partners Enplug and Blix for its signage installations. Given the extensive platform development that Yarra Ranges Tourism has created, they can act as an agent for the hardware and software, if a quote is required. Yarra Ranges Tourism has several different brands of touchscreens that have been tested.

The screen dimensions vary in models and sizes from 22 inches to 55 inches for indoor and outdoor models. Yarra Ranges Tourism has tested 22, 43, 49 and 55-inch screens for outdoor models. Each screen can run on a 4G mobile sim card or they can connect to existing WiFi in an area.

There are not any specific planning requirements that need to be met for installation, however each local government area will need to be approached to seek approval.

Yarra Ranges Tourism was able to install these on the basis they are for tourist information.

The cost per unit varies and depends on the size of the unit. As a guide, an indoor 49-inch unit starts at $5,000, while an outdoor 55-inch freestanding unit is about $12,000.

Additional costs include installation (between $2,000 and $4,000), software maintenance ($150 per unit per month), vinyl wrap branding (up to $800) and electricity supply. The warranty for each unit is 3 years and a lot of the current maintenance may be met by the technology partners (depending upon contractual arrangements).

Hardware maintenance costs for signs are difficult to estimate at this stage and would largely depend on resources and service agents. Yarra Ranges Tourism had one screen destroyed by vandals which had to be replaced at full cost. Yarra Ranges Tourism has also advised that securing insurance for the units has been problematic.

The benefits that have been reported include access to visitor data and a well-presented visual visitor servicing sign to support their customers. The benefits that nearby tourist providers have reported include Blix Tracking Technology that can tell hosts where visitors have been and where they go to if they are near another digital visitor information kiosk.

Interactive Digital Kiosk

An Interactive Digital Kiosk (IDK) could be installed in any of the aforementioned gateways at a relatively low cost. In lay terms, an IDK is a computer with a giant interactive screen. It can operate as a static sign, information centre or a map. Running on a Windows Operating System, an IDK can be loaded with an app, with video presentation or linked to the internet to run a website.

As the device is connected to the Internet, the Council can log in remotely at any time, meaning on-site visits are minimal. Through the unit's Content Management System, custom messages can be driven to the public by the time of day, day of the week, location, or other specifics, meaning all five gateways can display different content if necessary.

The starting cost of an indoor device with a 55-inch screen is $8,820. If the preferred location is outside, the IDK can be customised by the manufacturer for an additional cost.

A single-sided IDK outdoor device starts at $17,500 and a double-sided IDK starts at $21,980. The customisations include extra brightness, a sensor and a cooling system for the warmer months.

Yarra Valley Case Study

The Yarra Valley region is comprised of three local government areas; Nillumbik Shire Council, Yarra Ranges Shire Council and Manningham City Council. After discovering their information centres reached 6 million people and only 27,000 visited the region, the Yarra Ranges Shire Council's tourism unit closed two information centres in favour of interactive signage. To date, 19 interactive digital signs, both indoor and outdoor models, have been installed with a further 15 signs to be rolled out. While just 3 are installed public spaces, 16 sit on private properties.

The signs are touch screen, enabling the visitor to understand what is happening around the Yarra Valley in other sites. A three-touch system has been developed to enable fast access to a range of data. Tourists who have come to one site in the Yarra Valley could be tempted to attend other events or businesses. In this way, patrons may choose to stay for longer, spend more money within the region and have an expanded, enjoyable experience. Tourists also generate vast amounts of data for analysis. The software data enables the number of people who walk by, dwell time, most popular content and other information to be recorded. The software can also enable translation of a range of languages with the touch of a button.

Yarra Valley Chocolaterie and Ice Creamery installed an electronic/digital sign in July 2018 and become a hub of interactive information on Fixed Digital Sign (figures two and three). Visitors who are from other regions and who have come for ice cream or chocolate will learn more about the venue, potentially having a more fulfilling tourism experience. A positive association between the visitor and the Yarra Valley Chocolaterie and Ice Creamery is generated from the information provided. There is also synergy for the Yarra Valley Chocolaterie and Ice Creamery and other tourism venue operators. The visitor will benefit from greater awareness of the range of activities within the region. They may have come for a sweet treat but will have the chance to move to a secondary tourism attraction or plan for a return visit to expand their interaction with the region. This does not weaken the benefit to Yarra Valley Chocolaterie and Ice Creamery in any way but rather strengthens the region as a whole.

Figure One

Located near the Chocolaterie and Ice Creamery, the digital sign is unobtrusive, allowing the visitor to interact if they are interested.

Figure Two

The sign can promote several activities within the region at once, prompting nearby tourists to click on the image to learn more.

Figure Three

The sign can display a single image such as an upcoming Italian Festival in the region.

Local Example: Timboon

The Railway Shed Distillery

The Railway Shed Distillery at Timboon is a well-known attraction within the South West and close to one of Victoria's principal attractions, the 12 Apostles. The Railway Shed Distillery in Timboon is one of the members of the consortium that forms the 12 Apostles Gourmet Trail.

The 12 Apostles Gourmet Trail is designed as a loop which you can do before or after you visit the 12 Apostles themselves. It can be done in either direction and well signed. The food artisans include gourmet cheese, single malt whisky, craft beer, ice cream, chocolate, strawberries, fudge, olives and organic milk.

Many of the gourmet food trail artisans have products within The Railway Shed Distillery at Timboon, providing motivation to visit these passionate artisans on site or look for them on the menu and wine lists at other local dining establishments.

The 12 Apostle Food Artisans all work seasonally within their businesses, so The Railway Shed Distillery helps provide a promotional hub for their marketing during the peak and off-season periods. Further information can be sought from their social media page or website regarding their opening times and factory door sale opportunities.

www.12apostlesfoodartisans.com.au

The Railway Shed Distillery has been selected as a means to understand how the use of digital signs can augment the promotion of local business through the region, and specifically it provides an understanding of how it may interact with other promotional activities of the 12 Apostles Artisan Trail.

The 12 Apostle Artisan Trail has produced a map of attractions as a leaflet. However, this form of collateral is limited in its ability to provide information that is accurate, seasonally appropriate and customised to the consumer.

Figure Four

12 Apostle Artisan Trail Promotional Map has been produced as a hard copy leaflet.

Signage Installation

The planning permit requirements for signs depend on what type of sign is being proposed and the proposed location of the sign. Only once an application has been made identifying the exact type and size of the sign that any application for approval can be reviewed. In addition, the exact location is required before the planning implications can be determined. All Local Government Areas (LGA) refer to the Victorian Planning Schemes and the key sections for reviewing the requirements are included below.

36.04 Road Zone and 35.07 Farming Zone

Each zone or overlay provision in the planning scheme will specify the sign requirements to be considered under clause 52.05.

52.05 Signs

Specifies when signs require a permit and when one is not required, the application requirements and decision guidelines.

73.02 Sign Terms

Provides definitions for the different types of signs.

The VicPlan website will enable tourism organisations to identify zone and overlays affecting a particular area or property.

https://mapshare.maps.vic.gov.au/vicplan

An example of the planning requirements for signage can be derived from the Timboon Case Study. The Railway Shed Distillery is situated adjacent to a sensitive area with native vegetation and a creek line. For this reason, the placement of the sign cannot be in the car park adjacent to the sensitive area.

Placement on the walkway ramp heading up to the doorway may be possible, however the only guaranteed position would be opposite the doorway in the sheltered porch that is already enclosed. Inside the property would not be subject to planning approval but the limited space makes this a less desirable location.

In addition, inside the premises would not enable passing visitor data to be easily obtained due to the roaming nature of patrons reviewing products for purchase.

Options Analysis

No action - Status Quo

The current behaviour of visitors shows a high volume of tourists that visit the region and leave within a day. The status quo will not improve financial benefit to local food and fibre businesses and will result in a slow exposure of tourists to new and emergent agri-ventures.   **Not recommended**

Use digital fixed sign

If a trial of 7 fixed signs were to be installed at regional gateways, there would be a great increase in the data gathered on tourists and a high likelihood that they will visit more tourist locations whilst in the area. Potentially, this could secure a greater tourist dollar as interstate or intrastate visitors may alter travel plans and stay longer in the region and spend more. There is also the possibility of motivating return visitors, who upon seeing other opportunities on there first visit, may plan a longer stay next time. The cost is estimated to be $122,500 for 7 locations.   **Recommended**

Use digital fixed sign, supported with mobile sign

Using both digital fixed signage and mobile signage would increase exposure to agri-tourism producers and the use of mobile signs would enable flexibility to trial different locations and test the tourist traffic for a fixed sign in the future. However, the advantage of the mobile sign may be mitigated if the likelihood for relocation is frequently low. In this situation, a fixed digital sign would be a better option. The cost is estimated to be $145,800 for 7 locations and two mobile signs.   **Not recommended**

Further consideration

Whilst this paper aimed to support the first phase of the Council's Agri-Tourism Plan, to provide interactive digital signage, the feedback from stakeholders strongly suggests that a signage solution alone would not be supported. It is highly recommended to implement a marketing plan, that not only includes an element of signage to support agri-tourism, but also includes a number of supporting marketing initiatives. No two tourists are the same, so this approach will provide balance to the marketing mix and target specific customers. It will also allow tailored marketing for different visitors based on how they consume information and will allow a broader approach to marketing that can be further refined depending on marketing outcomes and budget.

Alternative Options

Beacon Technology

Beacon technology uses a mobile phone's Bluetooth Low Energy (BLE) to transmit a simple signal to small transmitters (beacons) roughly the size of a match box. These beacons can send and receive data to a consumer's mobile phone when they enter a set radius (up to 50m). These beacon-triggered notifications can be pushed alerts or targeted advertisements to the consumer; however, the consumer must have a specific application installed on their phone (linked to the business or origination that owns the beacon) and opt-in to push notifications on their mobile device. Users will opt-in to receive notifications from these applications when the outcome is beneficial, such as discounts or exclusive news. Deloitte reported that in-app interactions account for more than 56% of every dollar spent in a bricks and mortar store.

Between $25-$100. Supporting mobile application software development could cost up to $10,000.
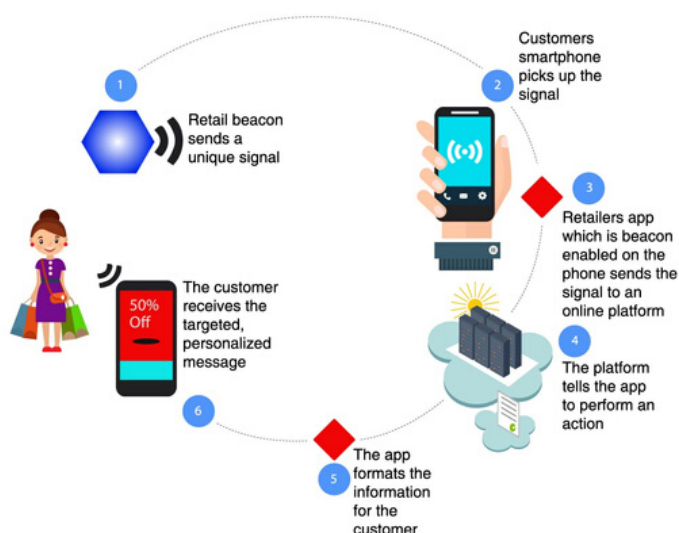
Social Media

There are three main social media channels that are proven to generate consistent traffic and revenue; Facebook, Instagram and Twitter. Facebook has two billion active users, including 17.1 million in Australia. Advertisements can be targeted to specific demographics such as age, gender, area, language spoken, life events, interests and hobbies. As a general rule, the more money you spend, the more efficient Facebook's algorithm becomes at spending your money and increasing your ad performance over time. Instagram has more than 500 million users, but has higher audience interaction rates (up to 58%). Instagram is skewed heavily to the 18-29 years old age bracket. Twitter has more than 328 million active monthly users. Brands use Twitter to drive awareness and promote specific products.

Suits any budget

Story Town App

Run by local UX media designer Jarrod Pickford, the Story Town App is an interactive 'chose your own adventure' experience for locals and tourists. Using short, five-minute podcasts, the application provides engaging tales of the region's producers, encouraging users to visit the businesses and find out more. Using the GPS feature in a user's phone, the podcasts automatically download within a set radius of the business or location.

$ Approximately $5,000 for 10 episodes

QR Codes

Quick Response (QR) codes are square barcodes that contain data, commonly a link to a website or a video, and the content within the link is critical. This technology is heavily used in China via WeChat. In San Francisco, operators use QR codes to cater for Chinese tourists, linking to videos featuring Mandarin speakers or maps in Cantonese.

$ Minimal, with low printing costs.

Mobile Visitor Centres/Ambassadors

An information centre on wheels, aimed to take information about the Great South Coast Food & Fibre industry to key tourist attractions with the region. This is an initiative to target tourists at high traffic areas with local ambassadors on hand to talk to tourists and showcase the food & fibre history and provide information about how to reach local agri-tourism operators.

$ Vehicle + custom fit-out + graphics. Approximately $100,000 - $150,000

Above the Line Advertising

Above the line advertising is where mass media is used to promote a brand and reach out to larger and more general consumers.

- Truck/bus wraps
- Service station pump signs
- Postcode direct mail marketing
- Food and wine expos
- Events/festivals/sports

$ Site fee/lease + printing/installation costs