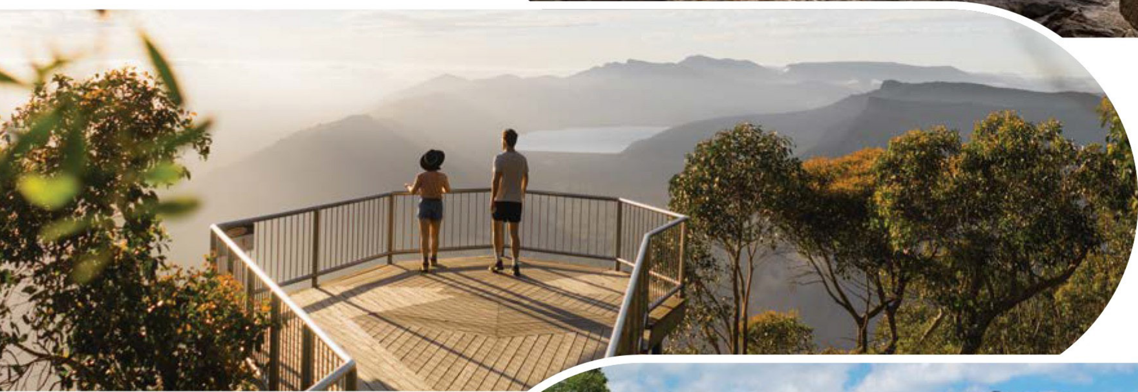
GRAMPIANS DESTINATION MANAGEMENT PLAN
2023–2030



VICTORIA
State
Government

Visit
grampians

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Acknowledgement of Country

Grampians Tourism acknowledges the traditional owners, Djab Wurrung, Jardwadjali and neighbouring First Peoples, who are the traditional custodians of the area where friends and family visit to enjoy everything the Grampians region has to see and do. We respect their history, culture, and Elders, past and present, and their continuous connection to Country.

Abbreviations & Definitions

ARCC	Ararat Rural City Council
BGLC	Barengi Gadjin Land Council
CAPEX	Capital Expenditure
COVID-19	Coronavirus disease
DJSIR	Department of Jobs, Skills, Industry and Regions
DMP	Destination Management Plan
DDWCAC	Dja Wurrung Clans Aboriginal Corporation
EMAC	Eastern Maar Aboriginal Corporation
F&B	Food and beverage
GPT	Grampians Peaks Trail
GT	GT
GMTO	Gunditj Mirring Traditional Owners Aboriginal Corporation
HRCC	Horsham Rural City Council
IVS	International Visitor Survey
LAAP	Local Area Action Plan
LGA	Local Government Area
NGSC	Northern Grampians Shire Council
NPS	Net Promoter Score
PV	Parks Victoria
RDV	Regional Development Victoria
SGSC	Southern Grampians Shire Council
TO	Traditional Owner
VPA	Victorian Planning Authority
VFR	Visiting Friends and Relatives
YE	Year End

Image credit: Dunkeld Arboretum Visit Victoria

Part 1: Executive Summary

1.1. Overview

The Grampians is a premier nature-based destination for Victoria, home to many walking trails, waterfalls, wildlife, and awe-inspiring lookouts. This is complemented by a breadth of growing arts and cultural experiences, as well as burgeoning food and drink experiences.

With a rich First Peoples' history, being home to 80% of Victoria's rock art sites[1] and major State Government investment into Brambuk The National Park & Cultural Centre so it can continue to evolve as a flagship experience in Victoria, the Grampians is also uniquely positioned to be Victoria's leading First Peoples' cultural visitor destination.

The Grampians Destination Management Plan (DMP) has been developed to guide the visitor economy for the region, reflecting the needs and aspirations of the community, industry, GT and its four member councils.

The Destination Management Plan

GT and its member councils have engaged Stafford Strategy to prepare this DMP to establish a shared vision and goals for the region's visitor economy to ensure long-term strength, success, and sustainability. This DMP is informed by independent research and analysis, as well as consultation with industry representatives, community groups, businesses, each council, and a variety of government stakeholders.

It also sits as the umbrella document over the four Local Area Action Plans (LAAPs) that were developed concurrently with this DMP. It provides the overarching strategic regional direction and vision going forward for the LAAPs to align to.

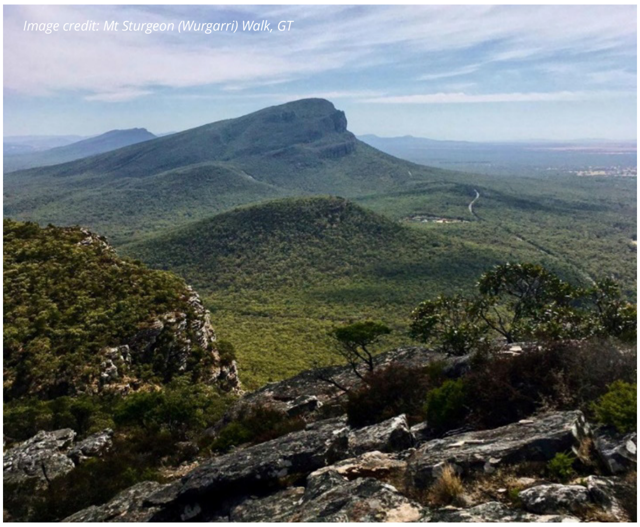


Image credit: Mt Sturgeon (Wurgarri) Walk, GT

The Grampians

The Grampians is in western Victoria and encompasses the four local government areas (LGAs) of Ararat Rural City Council, Horsham Rural City Council, Northern Grampians Shire Council and Southern Grampians Shire Council. Halls Gap lies in the centre of the region and is a bustling tourism hub supporting exploration into the Grampians (Gariwerd) National Park.

Access to the Grampians from Melbourne is via Ararat, but many visitors also travel along the Great Ocean Road and enter the southern part of the region via Hamilton and others via Adelaide through Horsham.

In 2022, the Grampians attracted 1.3 million visitors, more than half (53%) of which were domestic day trippers.

The Experience

The Grampians provides a high-quality nature-based getaway, offering a diverse range of walking trails, waterfalls and lookouts, flora and fauna viewing as well as natural and built lakes and waterways. The major investment by the Victorian Government of over $30 million into the Grampians Peaks Trail (GPT) demonstrates the strength of the natural environment offered.

The towns that surround Grampians (Gariwerd) National Park also offer their unique points of difference, with some being more developed tourism destinations and others developing as emerging tourism locations with strong interests in food, culture, and wine.

Areas for further development more broadly across the region include regional accommodation, access and transport, food and built visitor-ready, bookable attractions.

[1] https://www.visitgrampians.com.au/see-do/culture/indigenous-culture/aboriginal-rock-art-sites

1.2. Strategic Framework

The following strategic framework guided the development of this DMP and should be used to direct tourism development and marketing in the Grampians region going forward.

Figure 1: Strategic Framework

Vision **The Grampians will be recognised as one of Australia's premier, sustainable nature-based and First Peoples' tourism destinations, allowing visitors to experience abundant nature and rich culture that is supported by a connected and thriving industry.**

Strategic Objectives

1. Facilitate investment in the visitor economy that positions the Grampians as an attractive place to live, work, visit and play.
2. Support First Peoples-led product development and delivery of tourism experiences.
3. Achieve sustainable visitation patterns by growing visitor dispersal and off-peak visitation to support business sustainability.
4. Increase visitor yield by growing visitor dwell time and growing overnight visitation.
5. Generate investment in supporting infrastructure that will enable visitor economy growth.
6. Support a cohesive, integrated, and supported industry and community.

Targets

The following performance targets have been identified for the Grampians.

754,000 to 905,000

20% Growth

In overnight visitors to the Grampians between 2022 and 2030.

$273m to $355m

30% Increase

In visitor expenditure in the Grampians between 2022 and 2030.

2.6 nights to 3.1 nights

20% Growth

In the average length of stay in the Grampians between 2022 and 2030.

Themes

Key themes to guide future investment in the Grampians have been identified. These have been selected in response to strategic considerations and objectives for tourism development and to align with Experience Victoria 2033.

1. **Nature, Recreation and Wellness**
2. **First Peoples**
3. **Food and Drink**
4. **Arts and Culture**
5. **Regional Accommodation**
6. **Identity, Marketing and Placemaking**
7. **Industry Development and Collaboration**
8. **Supporting Infrastructure**

1.3. Priority Recommendations

Table 1 outlines the 30 priority recommendations that have been identified in response to the strategic investment themes, vision and objectives outlined. They will "create compelling visitor experiences that are both productive and sustainable"[2] for the Grampians region. The priority recommendations are ones that will either deliver the greatest economic benefit for the region, will support the positioning of the Grampians as a leading visitor destination and/or are considered important building blocks for the sustainability of the Grampians as a visitor destination. The priority recommendations have been identified using a detailed project ranking process, outlined in Section 4.1.1.3.

In addition to these priority recommendations, 127 other recommendations have been identified across the Grampians and these are outlined in Section 4.1.

Table 1: Priority recommendations linked to the Strategic Investment Themes

Strategic Investment Theme		Detail	Priority Recommendations
1	**Nature, Recreation and Wellness**	Continue to showcase and celebrate the Grampians' spectacular natural environment by encouraging immersive nature-based experiences and delivering supportive infrastructure, facilities, and services to create unmatched and sustainable nature-based, recreational, and complementary wellness experiences.	▪ Dunkeld geothermal bathing experience ○ ▪ Indoor activity centre ○ ▪ The Bath House Pomonal ○
2	**First Peoples**	Be led by the Grampians' First Peoples' communities to support distinctive and authentic First Peoples' experiences, to build a greater understanding of their stories in both historical and contemporary forms.	▪ Brambuk upgrade ○ ▪ Industry training with First Peoples and Elders including a cultural induction for Licensed Tour Operators ◆
3	**Food and Drink**	Elevate the region's food and drink experiences to showcase the quality produce and provenance available and more strongly connect this with the place and people that lie behind the food.	▪ Ararat distillery ○ ▪ Chocolatarium (chocolate factory) ○ ▪ Expansion of Grampians Food and Drink Packages ○ ▪ Grampians Wine Discovery Centre (showcase and attraction) ○
4	**Arts and Culture**	Continue to foster the development of the Grampians' emerging and diverse arts and culture scene via its many art galleries, museums, art trails, performing art venues and cultural facilities, connecting visitors with authentic, local experiences, and encouraging them to disperse throughout the region.	▪ Expansion of J Ward Ghost Tours ○ ▪ Hamilton Gallery revitalisation ○

○ **Development Projects** ◆ **Strategic Initiatives**

[2] GT 5-year Strategy, GT

Strategic Investment Theme		Detail	Priority Recommendations
5	**Regional Accommodation**	Focusing on the development of additional accommodation supply for the Grampians, including (but not limited to) larger scale, CBD-based hotel properties, higher-end resort/villa accommodation, destination holiday park accommodation, tiny home-style/off-grid accommodation, glamping-style accommodation along with the retrofitting of existing properties.	▪ 4-star accommodation at Halls Gap ○ ▪ Ararat CBD branded accommodation (80+ rooms) ○ ▪ Designation of sites for worker accommodation and packaging of these to investors ◆ ▪ Dunkeld luxury units ○ ▪ Great Western accommodation development (60 rooms) ○ ▪ Hamilton CBD branded accommodation (60+ rooms) ○ ▪ Horsham CBD branded accommodation (80+ rooms) ○ ▪ Mount Zero Resort (Stage 2) ○ ▪ Stawell CBD branded accommodation (60+ rooms) ○
6	**Identity, Marketing and Placemaking**	Continue to grow awareness of the Grampians brand to ensure it is well-recognised and known as a compelling visitor destination.	▪ Grampians (Gariwerd) National Park Public and Private Investment Strategy to support regional dispersal and Central Corridor Experience Masterplan ◆ ▪ Greater marketing and profiling of the GPT at a state and national level ◆ ▪ Greater tourism destination marketing campaign funding to encourage dispersal ◆ ▪ Regional visitor servicing strategy ◆ ▪ Review of LGA planning schemes ◆ ▪ Tourism Investment Marketing Campaign ◆
7	**Industry Development and Collaboration**	Fostering the development of the Grampians' industry via ongoing engagement, collaboration, and training to develop a strong and visitor-ready industry across the region.	▪ Industry development training (customer service, product/experience development, social media, marketing, grant application writing) ◆
8	**Supporting Infrastructure**	Supporting visitor economy growth by advocating for investment into infrastructure, transport connections and visitor services.	▪ Advocate for peak season public transport options around the Grampians ◆ ▪ Horsham Aerodrome redevelopment ○ ▪ Pedestrian priority for Halls Gap (once Heath Street bridge is developed) ○

○ **Development Projects** ◆ **Strategic Initiatives**

Image credit: Grampians Peaks Trail, Visit Victoria

Part 2: Where Are We Now?

2.1. Introduction and Context

2.1.1. Overview

Grampians Tourism (GT) has developed this Destination Management Plan (DMP) to provide direction for the sustainable development of our visitor economy that:

- supports the attraction of investment across the region; and
- ensures the Grampians remains a leading nature-based tourism destination and is both compelling for visitors and sustainable for local communities.

This DMP sits as the overarching document and provides direction to the four Local Area Action Plans (LAAPs) that were developed concurrently with this DMP for each local government area (LGA) in the Grampians region (Ararat Rural City Council, Horsham Rural City Council, Northern Grampians Shire Council and Southern Grampians Shire Council).

GT is the peak tourism board for the Grampians region and is responsible for providing the overarching tourism direction to guide the development of the region's visitor economy.

The area included in the Grampians region is indicated in Figure 2 on page 9.

2.1.2. Methodology

The following investigations and inputs were undertaken or reviewed to inform this DMP.

- Ongoing desktop research and literature review.
- Situation analysis of what exists now and why.
- Workshops with industry and other relevant stakeholders.
- Ongoing liaison with individual stakeholders (public and private)
- Visitor economy assessment (including historic visitation and spending data).
- Community and industry visitor economy survey (see Appendix 2).
- Tourism product audit, gap analysis.
- Consumer sentiment assessment of the region's quality and value for money.
- Analysis of macro factors relevant to the visitor economy.
- Identification of preliminary recommendations.
- Workshop with industry to discuss findings and preliminary recommendations.
- Prioritisation of recommendations.
- Development of draft DMP document.
- The socialisation of draft DMP and integration of any feedback.
- Finalisation of the DMP.

2.1.3. Consultation Undertaken

The input received from a wide variety of stakeholders was invaluable and provided a key resource for the DMP's preparation. Table 2 provides a summary of those consulted.

Other points to note include the following

- Industry consultations (one-on-one sessions) along with many workshops and focus group sessions with a variety of stakeholders across the region.
- A major survey was also distributed to the community and industry which focused on the Grampians' visitor economy (the findings of the survey are included in Appendix 2). This provided feedback from a wide range of stakeholders which illustrated alignment between community and industry in aspirations and outcomes and enabled input from those unable to attend in-person sessions (200 responses were received).
- GT has been in discussions and reached out to each of the three Traditional Owner Corporations in the Grampians.
- GT will continue to collaborate across the non-connected LGAs to encourage and develop strong industry partnerships and facilitate the ongoing implementation of this DMP. Industry partnership opportunities will be extended to tourism operators based outside the GT geographical boundary, and industry development opportunities extended to all Wimmera Mallee LGAs and industry.

Table 2: Who was consulted

1. Informing and Guiding the DMP	2. Broader Stakeholder Consultation	3. Government & Other Agency Consultation
▪ GT. ▪ Project Control Group (comprising personnel from GT, the Department of Jobs, Skills, Industry, and Regions, Ararat Rural City Council, Horsham Rural City Council, Northern Grampians Shire Council and Southern Grampians Shire Council). ▪ Visit Victoria (meeting with senior manager and team) ▪ Eastern Maar Aboriginal Corporation (via several phone and follow-up email discussions). ▪ Barengi Gadjin Land Council (via a site visit attended by the CEO of BGLC). ▪ Gunditj Mirring Traditional Owners Aboriginal Corporation (meeting minutes shared and contact made with the new CEO). ▪ Council CEOs and members of the Executive Teams.	▪ A workshop was held in each Council area (4 total) with over 30 council personnel from various departments. ▪ A series of industry workshops were held in each Council area throughout the project. In total, 10 of these workshops were held over the course of the project and were attended by over 130 stakeholders. ▪ A series of separate community workshops were also held in some of the Council areas (3 total) and were attended by 25 stakeholders. ▪ One-on-one meetings and interviews with developers and investors.	▪ Regional Development Victoria. ▪ Parks Victoria. ▪ Great Ocean Road Tourism. ▪ Wimmera Mallee Tourism. ▪ Wimmera Development Authority.

2.1.4. About The Grampians

The Grampians region is located in western Victoria, approximately 3 hours north-west of Melbourne. The region, which is home to an estimated 61,000 residents, is a leading nature-based destination, with this profile largely built off Grampians (Gariwerd) National Park and its associated recreational, "big nature" and outdoor adventure activities.

Surrounding Grampians (Gariwerd) National Park are several service towns and extensive agricultural areas. Major towns comprise of Ararat, Dunkeld, Halls Gap, Horsham, Hamilton, Stawell, and St Arnaud. For many of these areas, tourism represents a large economic sector, contributing significantly to overall economic output and jobs created.

Figure 2: The Grampians Region

2.1.5. The Role of Grampians Tourism

Grampians Tourism (GT) in partnership with our four LGAs, Ararat Rural City Council, Horsham Rural City Council, Northern Grampians Shire Council and Southern Grampians Shire Council, has a primary purpose to deliver a coordinated approach to marketing, product development, infrastructure investment and industry development for the region.

We aim to create a cooperative and vibrant visitor economy that supports the growth of tourism expenditure and length of stay and adds value to our partners through promotion and increased brand awareness.

GT has a leadership and coordination role in the development of the region's visitor economy. It relies heavily on the goodwill, financial support, and cooperative efforts of its public and private industry partners to develop and deliver destination marketing and tourism programs for the region.

GT relies heavily on the financial contributions from both State and Local Governments and businesses to deliver the annual work plan.

The members of the GT Board are:

- LGA CEOs of Ararat, Horsham, Northern & Southern Grampians
- Up to 2 Industry Members
- An Independent Chair

2.1.5.1. Key partnerships

- Tourism businesses
- Department of Jobs, Skills, Industry and Regions
- Visit Victoria
- Tourism Australia
- Parks Victoria
- Regional Development Victoria
- Ararat Rural City Council
- Horsham Rural City Council
- Northern Grampians Shire Council
- Southern Grampians Shire Council
- Traditional Owner Corporations
- Great Southern Touring Route
- VTIC

2.1.5.2. Stakeholders

Members of the tourism industry and other organisations that support the development of the Visitor Economy in the Grampians region include:

- Tourism operators, local tourism associations, industry sector groups and business groups.
- Local community members and groups (including organisers of community-based tourism initiatives).

2.1.5.3. Industry and Stakeholder Communications and Engagement

The purpose of GT communications activities is to ensure that the tourism industry within the Grampians region, and stakeholders both within and outside the region, are kept informed, are engaged in GT's activities, successes are celebrated, and key learnings are shared. Success is the creation of strong, two-way communication between key stakeholders and industry and a definable increase in confidence in GT's strategic direction.

The aim of the communications is to stimulate participation and support for GT's marketing, product, and industry development activities, as well as to raise the profile of GT and promote the broader benefits of tourism to the wider community.

2.1.5.4. Grampians Tourism's Strategic Priorities

Priority 1: Destination Marketing

- Deliver effective activity to increase length of stay, dispersal, yield, and regional brand equity.
- Support events aligned with our seasonal and dispersal objectives.
- Drive high-yielding occupancy in shoulder and mid-week periods.

Priority 2: Industry Development

- Champion activities that increase operator capacity and grow the visitor experience.
- Deliver Industry Strengthening activity (digital marketing, business management, product development and customer experience).

Priority 3: Product Development

- Develop high-quality collateral that supports destination marketing efforts.
- Curate products to create compelling, productive, and sustainable visitor experiences.

Priority 4: Partnerships

- Facilitate collaboration across our industry and communities including strategic planning, product development, marketing and industry development and investment.
- Leverage and grow our partnerships.
- Introduce innovative ways to add value to industry partnerships.

Priority 5: Investment Attraction

- Engage community and industry on tourism-related projects to raise the visitor economy profile.
- Attract private investment into infrastructure and experiences.
- Work with Local Government partners to attract new investors and investment opportunities.

2.1.5.5. Destination Marketing

2.1.5.5.1. Guiding Principles

- Champion the Grampians brand to increase awareness of each of the local government areas, develop and refine the brand position for the destination, and operate in alignment with Visit Victoria's state-wide brand positioning.
- Create a cooperative and vibrant visitor economy that adds value to our partners through promotion and increased brand awareness.

- Support events aligned with our seasonal and dispersal objectives.
- Deliver effective marketing strategies to increase length of stay, dispersal, yield, and regional brand equity. And to help drive high-yielding occupancy in shoulder and midweek periods.

2.1.5.5.2. Strategy

Implement an integrated destination marketing strategy to build the Grampians brand, raise awareness, drive visitation, and maximise ROI.

Destination Marketing Campaigns

- Visit Victoria's Co-operative Marketing Program: to leverage their reach and activity in alignment with their Masterbrand framework including the Grampians sub-brand promise, content pillars and proof points to ensure our region is marketed to its strengths and remains distinctive from the other regions in Victoria.
- Masterbrand promise:
    - Enrich every moment with ancient mount grandeur.
    - Pillars:
        - Nature at your fingertips: mountain ranges, hikes and bushwalking trails, waterfalls and lookouts, lakes, and scenic drives.
        - Passion for quality: Premium food and drink experiences, our wine region and cellar doors, and artisans.
        - Storied culture: First Peoples' experiences, grassroots community culture, towns and villages, and art galleries and history.
    - Proof points: exceptional regional product that demonstrates the offering of each pillar.
- Content partnerships: partner with select media to develop a marketing campaign focusing on 'Road Trip' itineraries that encourage dispersal and promote the core assets and complementary activities in the Grampians. And that continues to position the Grampians as the ultimate road trip destination in Victoria.

Digital Marketing

- Website: continual content updates and improvements to drive 'conversion' events on our website and optimise opportunities for partner click-outs.
- Social media: develop a strategic and compelling content plan to build engagement on Instagram and Facebook.
- Blogs: regular blogs focused on relevant and compelling content.

Public Relations

- Itineraries and 'Listicles': develop considered content to suit regional/seasonal activity.
- Seasonal Media Releases: curate seasonal releases that capture the highlights of the region for each season.
- Media Familiarisations: execute media famils with select journalists to gain coverage for the region.

Leveraging Events

- Grampians Grape Escape and the GPT (Grampians Peaks Trail) 100 Miler: provide in-kind marketing support and event exposure through GT-owned channels & Visit Victoria.
- Other Events: support through marketing content and inclusion in seasonal media releases.

Database Marketing

- E-Newsletter: monthly consumer-focused newsletter aimed to build relationships with the target audience and provide relevant content such as what's on, deals and discounts, seasonal updates, operator features and inspirational content.
- Database growth: develop a high-value, aspirational competition to build the Visit Grampians database.

Asset Development

- Collateral: a review of owned assets.
- Renew industry toolkits and brochures.

International Marketing (GSTR)

- Participate in the Great Southern Touring Route.
- Participate at the Australian Tourism Exchange (ATE) under Visit Grampians/GSTR brand.

How we inspire and convert:

- **Always Be 'On'** – there will be no gaps in our marketing activities to ensure we are in the minds of our target audience year-round.
- **Building Stronger Consumer Connections** – deliver the right message, in the right way, to the right people at the right time.
- **Brand Message** – we will look for innovative ways to cut through the marketing 'clutter' and be consistent.
- **User-Generated Content (UGC)** – we will foster and amplify user-generated content to promote the destination.
- **Digital Marketing** – we will enhance our online presence using owned, earned, and paid media, with targeted digital marketing campaign tactics.
- **Public Relations** – we will attract journalists and influencers to the region to generate positive media coverage.
- **Website** – deliver a visually attractive and easy-to-navigate site that is a trusted source of information and supports content marketing and user-generated content.
- **Events** – we will leverage 'homegrown' events to drive visitation and enhance the resident experience to encourage them to help champion our region.

2.1.6. Alignment with Relevant Strategies

2.1.6.1. Experience Victoria 2033

Experience Victoria 2033, released in May 2023, is a strategic plan that seeks to shape the future of Victoria's visitor economy over the next 10 years.

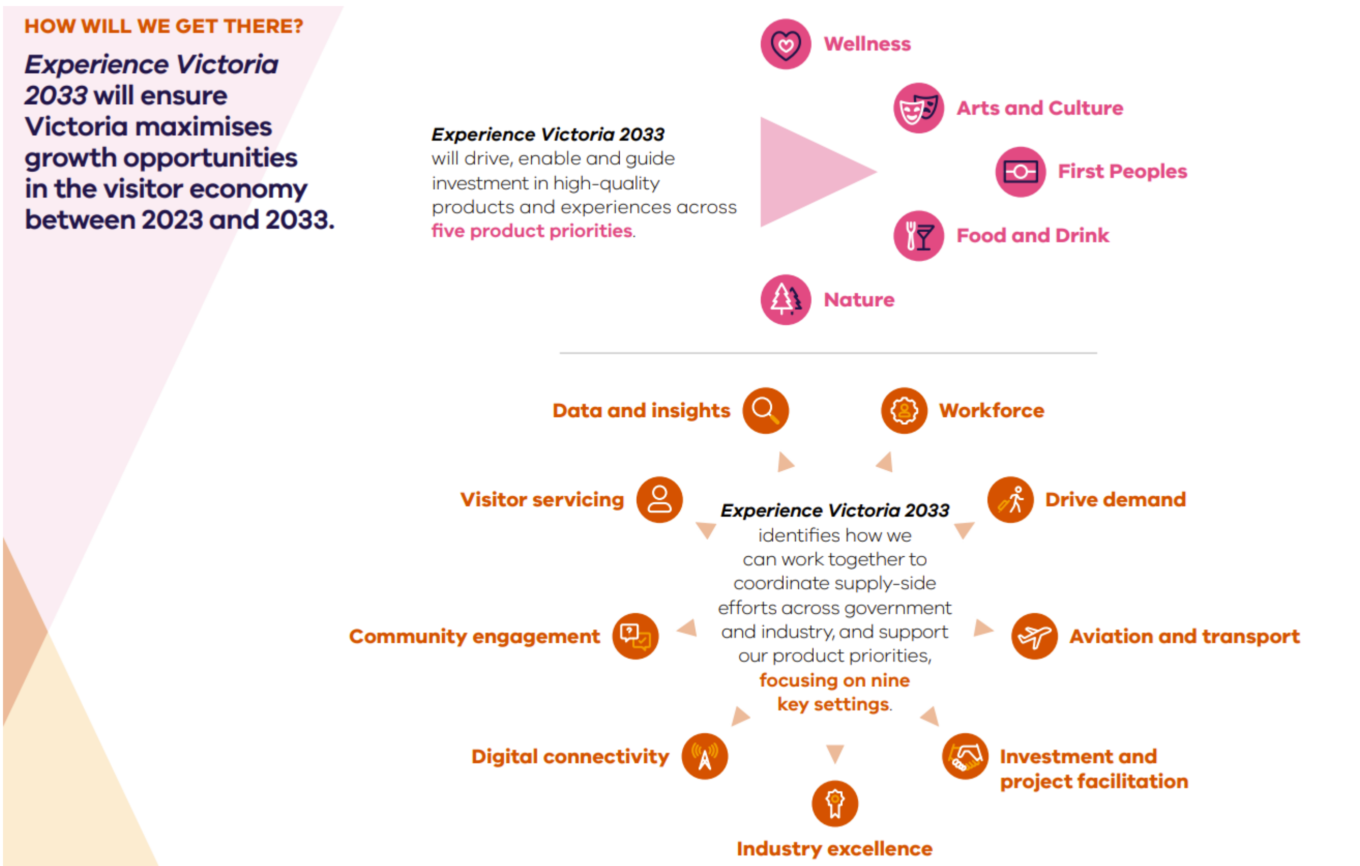
This DMP has ensured strong alignment with Experience Victoria 2033 by integrating the plan's key product priorities and settings into the themes identified as part of the DMP's Strategic Framework – see Table 3.

Additionally, the DMP's vision focuses strongly on the Grampians' strength as a nature-based destination and the potential to be recognised as Victoria's premier First Peoples' visitor destination.

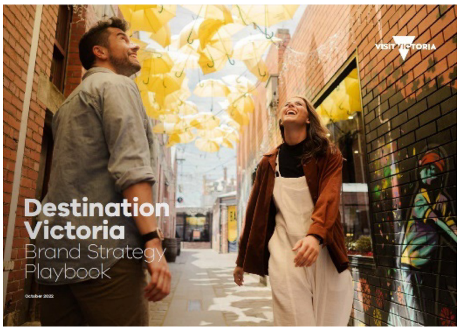
Table 3: Experience Victoria 2033 Product Priorities and Grampians DMP Alignment

Experience Victoria 2033 Product Priorities and Settings	Grampians DMP Themes
Wellness Nature	Nature, Recreation and Wellness
Arts and Culture	Arts and Culture
First Peoples	First Peoples
Food and Drink	Food and Drink
Visitor Servicing Data and insights	Identity, Marketing and Placemaking
Industry Excellence Workforce	Industry Development and Collaboration
Digital Connectivity	Supporting Infrastructure
	Regional Accommodation

Figure 3: Experience Victoria 2033 Product Priorities and Settings



2.1.6.2. Destination Victoria Brand Strategy



The Destination Victoria Brand Strategy playbook was developed as a tool to define Victoria's overarching brand as well as its various sub-regional brands and the strategy behind these. A key objective of the playbook is the ensure that the brand messaging for the state and each sub-regional destination is unique, compelling, and different.

This DMP has aligned with the sub-regional branding outlined in the Destination Victoria Brand Strategy for the Grampians region (see Figure 4) by:

- Having nature and First Peoples as a key focus of the vision developed for the DMP; and
- Through aligning with the pillars identified in the brand framework via the themes developed for the DMP's Strategic Framework (including Nature, Recreation and Wellness; First Peoples; Food and Drink; and Arts and Culture). As a result, many of the product development opportunities identified as part of this DMP align very strongly with the pillars identified in the regional sub-brand pillars and areas of hikes and bushwalking trails, waterfalls and lookouts, premium food and drink experiences, wine region and cellar doors, First Peoples, grassroots community culture, towns and villages and art galleries and history.

Figure 4: Regional sub-brand framework - Grampians[3]

Visitation drivers	Escape my everyday	Surprise and delight me	Spark my imagination
Victorian Masterbrand promise **Grampians sub-brand promise**	Enrich every moment with Ancient mountain grandeur		
Pillars	**Nature at your fingertips** • Mountain ranges • Hikes and bushwalking trails • Waterfalls and lookouts • Lakes • Scenic drives	**Passion for quality** • Premium food and drink experiences • Wine region and cellar doors • Artisans	**Storied culture** • First Peoples cultural experiences • Grass roots community culture • Towns and Villages • Art galleries and history
Proof points	• Grampians (Gariwerd) National Park • Grampians Peak Trail • MacKenzie Falls, Beehive Falls, Reed Lookout and The Balconies • Lake Bellfield, Lake Fyans, Lake Lonsdale • The Grampians Way touring route	• Wickens at Royal Mail Hotel, Flame Brothers Restaurant & Bar, Paper Scissors Rock Brew Co. • Seppelt Wines, Best's Wines Great Western, Grampians Wine Cellar, Pomonal Estate • Mount Zero Olives, Five Ducks farm • Grampians Grape Escape	• 80% of Victoria's rock art with sites dating back 20,000 years • Brambuk - The National Park & Cultural Centre • Moyston, birthplace of Marngrook (AFL) • Harrow, home of the First XI • Stawell Gift • St Arnaud gold history • MOCO Gallery, Hamilton Gallery, Ros McArthur's Studio • Gum San Chinese Heritage Centre, J Ward
Personality traits	Open-minded	Creative	Intriguing

[3] Destination Victoria Brand Strategy, page 26.

2.2. Visitation to the Grampians

2.2.1. Visitor Economy Snapshot

Figure 5: Visitor Economy Snapshot 2022 (September YE) [4]

1.6 m

Trips in 2022
51% domestic day trip
49% domestic overnight
0.2% international overnight

2.0 m

Nights in 2022
99% domestic overnight
1% international overnight

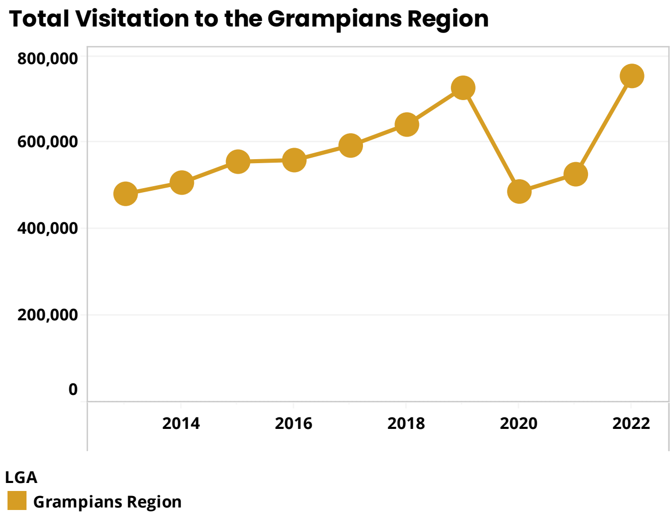
$273 m

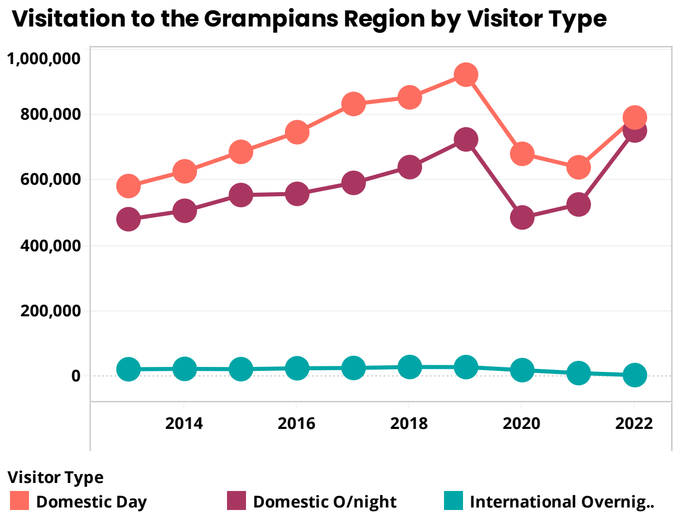
Spend in 2022
28% domestic day trip
71% domestic overnight
0.3% international overnight

2.6 nights

Average Length of Stay
2.6 nights - domestic overnight
4.1 nights - international overnight

Figure 6: Total Visitation, 2013-2022 [5]





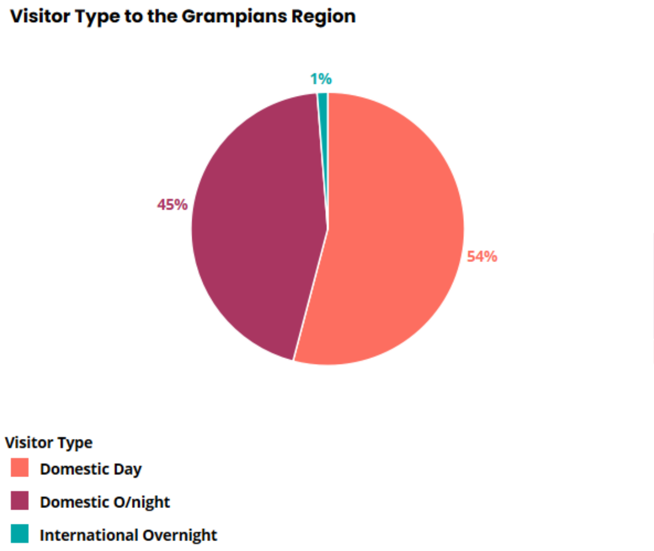
2.2.2. Historic Visitation

The Grampians has a vibrant visitor economy, with 1.6 million visitors travelling to the region in 2022. Despite being impacted by COVID-19, like every region around the country, the Grampians has recovered well, with visitation reaching almost pre-COVID-19 levels in 2022, buoyed by a strong domestic visitor market seeking regional destinations to visit.

The Grampians' visitor economy has historically been dominated by domestic travel and largely domestic day trip travel. Domestic day trip travel has comprised more than half of all visitation over the past ten years (see Figure 7). This is likely driven by the region's proximity to major urban population centres in regional Victoria (such as Ballarat, Bendigo, and Geelong), its highly attractive natural environment and strong intrastate visitation for service support including medical, education and business.

[4] National and International Visitor Survey, Tourism Research Australia. Based on three-year averages, with the exception of COVID-19 impacted data from 2020 to 2022.
[5] Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

Figure 7: Visitor type to the Grampians region (10-year average, 2013-2022)[6]



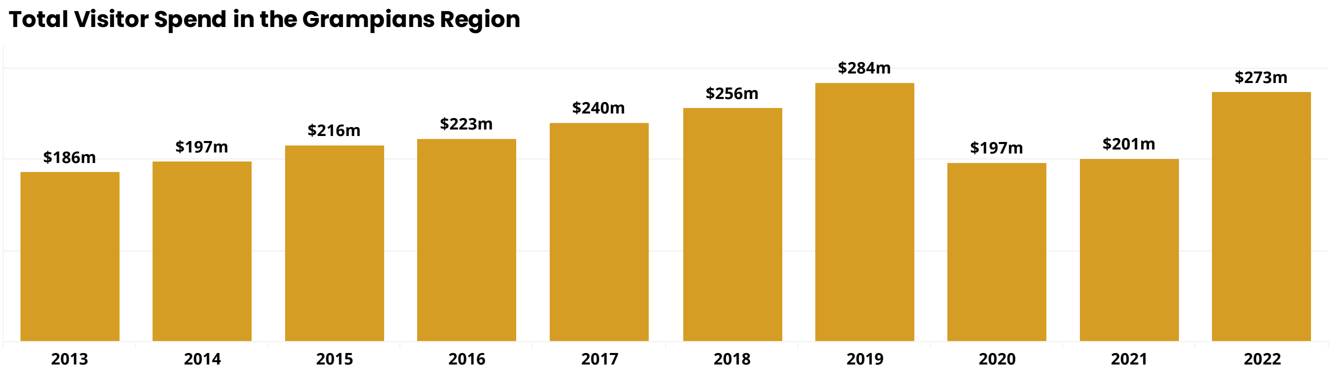
2.2.3. Historic Visitor Spending

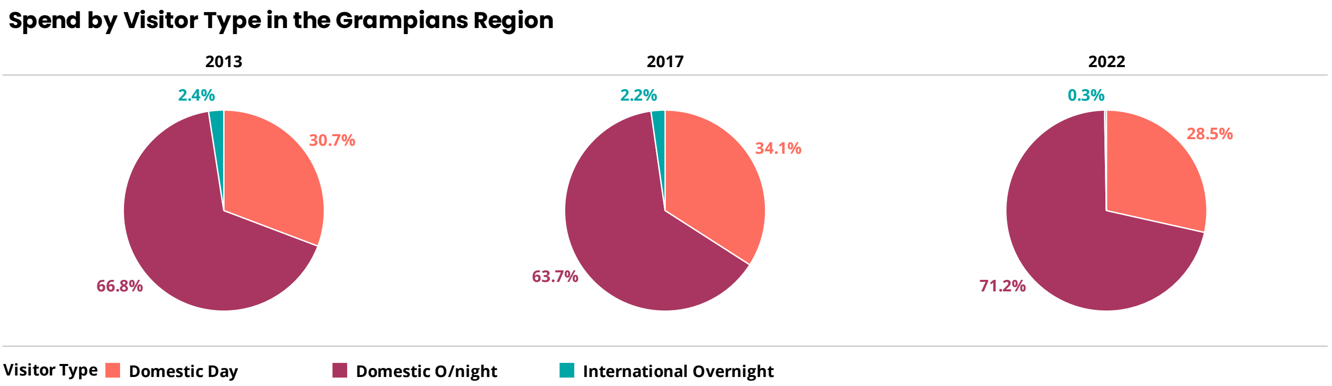
While the day trip market forms an important component of the visitor economy, it typically is relatively low yielding, accounting for only 29% of visitor spending in the region in 2022, despite comprising more than half of total visitation. Domestic day trippers, on average, spent $98 in the region, compared with domestic overnight visitors who spent 2.6 times this amount at $258 per trip. Higher spending by overnight visitors is generated because of additional spending on accommodation, food and beverage, transport, attractions etc.

A key objective of this DMP, as noted during the consultation phase, is to grow visitor spending, rather than merely focusing on growing the number of visitors travelling into the region. To achieve this, the Grampians will need to focus on:

- encouraging investment into upgrading existing accommodation stock and the development of new accommodation;
- developing new, visitor-ready, and bookable experiences and products;
- enhancing infrastructure to support the development of the visitor economy;
- creating bookable packages to support a longer length of visitor stays;
- developing evening-based visitor products to encourage overnight stays; and
- introducing all-weather products for times of inclement weather.

Figure 8: Visitor Spend, 2013-2022[7]





[6] September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

[7] Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

2.2.4. Source Market

Currently, the Grampians is largely an intrastate visitor destination.

- The domestic day trip market is overwhelmingly made up of Victorians, comprising 95% of all travellers over the last 10 years. The remaining 5% originate from South Australia.
- Victorians also make up most domestic overnight visitors, totalling 76% of all travel over the last 10 years, of which the majority are from greater Melbourne and surrounding LGAs to the Grampians. This is followed by South Australians (11%), NSW residents (5%), Queenslanders (2%), and those from other states/territories (2%).
- From 2013-2022, intrastate overnight visitors accounted for 20% of visitation to the Grampians. There is the opportunity to grow the Grampians' interstate visitor market through the development and promotion of iconic attractions, adding new products and increasing consumer brand awareness.
- There is an opportunity to engage further with international target markets as international travel returns, though the core focus should be the domestic interstate and intrastate markets.

Figure 9: Day trip & domestic overnight visitor origin (10-year average, 2013-2022)[8]

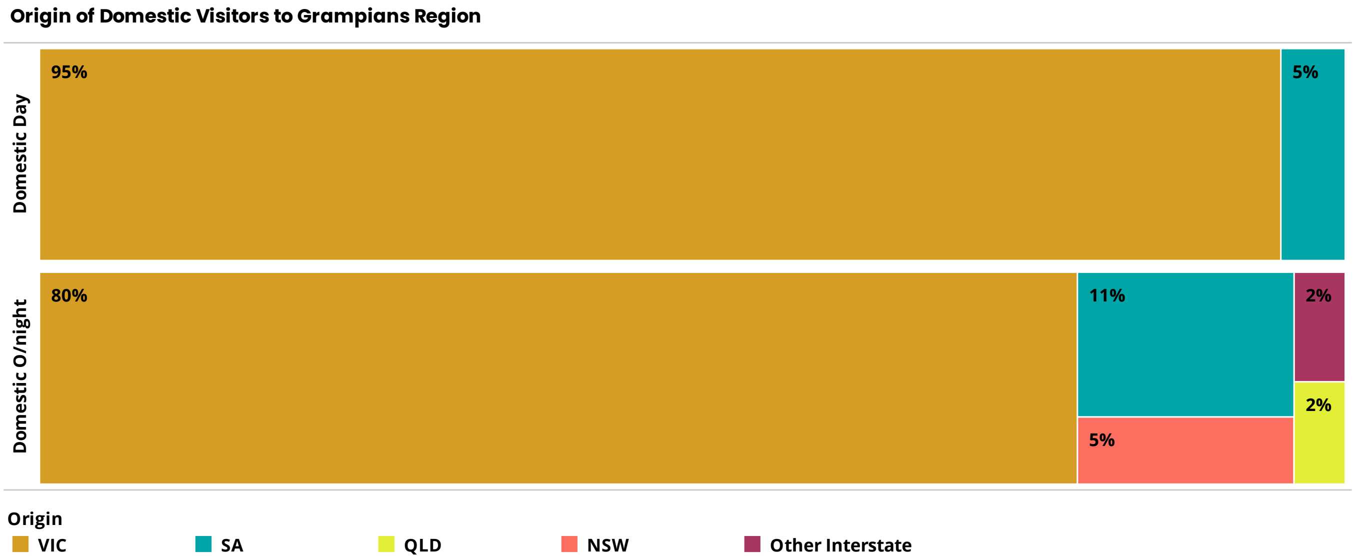
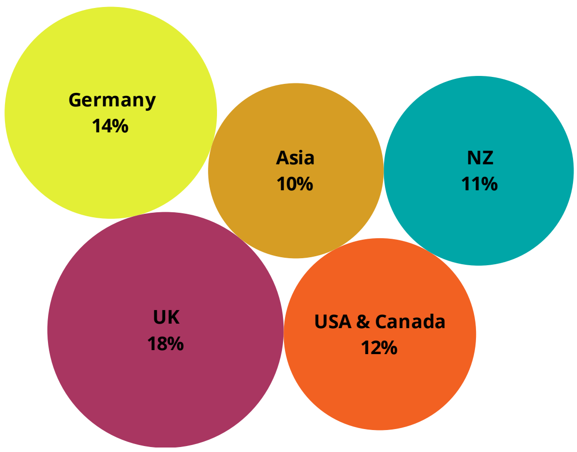


Figure 10: International overnight visitor origin (7-year average, 2013-2019)[9]



[8] Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.
[9] A 7-year average period has been used up to 2019 to reflect pre-COVID-19 data. Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

Image credit: Grampians Peaks Trail, Visit Victoria

2.2.5. Motivation of Travel

The Grampians is very much a leisure destination, with almost half (47%) of all domestic visitors travelling to the region for a holiday and more than 80% of all international visitors travelling for that reason. This aligns with the current destination proposition of the Grampians and is a strength for the region, given the propensity of holiday visitors (when compared with other motivations) to undertake bookable, commissionable products, when available.

The visiting friends and relatives (VFR) motivation is also relatively strong and presents an opportunity to promote tourism assets and experiences to residents to promote to those visiting friends and relatives.

Although business travel is not a dominant motivation for travel, it does present niche opportunities for the region, and for several of the towns in the Grampians region in particular. This includes the development of smaller-scale business events, incentive travel, team building and business accommodation facilities. And with expected growth sectors of the regional economy (resources and mining for Horsham, major waste management recycling for Ararat, and agriculture, horticulture and viticulture for Northern Grampians and Southern Grampians Shires amongst others), potential for solid growth in business-related travel may be expected.

Figure 11: Motivation of travel to the Grampians (10-year average, 2013-2022)[10]

Visitor Type	Motivation	%
Domestic Day	Holiday	**47%**
	VFR	21%
	Business	13%
	Other	19%
Domestic O/night	Holiday	**47%**
	VFR	29%
	Business	17%
	Other	7%
International Overnight	Holiday	**81%**
	VFR	14%
	Business	4%
	Other	1%

[10] Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

Figure 12: Primary and Emerging Product Strengths[11]

Primary Strengths

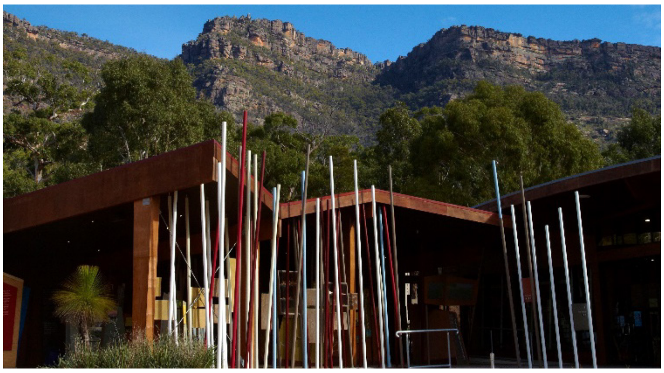
Nature-based Experiences

Recreation

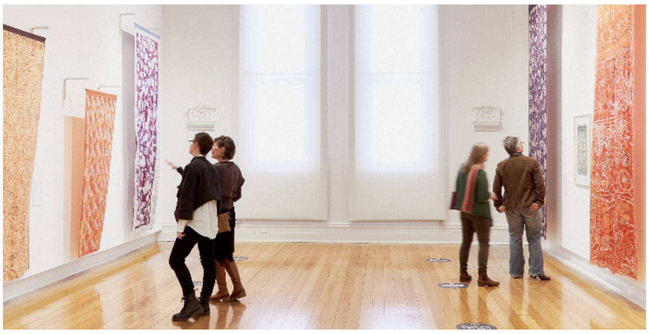
Lakes and Waterways

Emerging Strengths

First Peoples



Art, Culture and Heritage



Food and Drink

Health and Wellbeing

[11] Image credits: Visit Victoria

2.3. The Grampians' Tourism Offering

2.3.1. Products & Experiences

The Grampians offers a high-quality nature-based destination, particularly centred on Grampians (Gariwerd) National Park. However, the broader Grampians region and its surrounding towns offer much more than this.

The primary appeal of the Grampians relates to the region's nature-based assets (see Figure 12) including its hiking, lakes and waterway-based experiences and related recreation activities and attractions.

Emerging strengths of the region (see Figure 12) include First Peoples' product (while the raw product exists, visitor-ready product is still emerging), food, beverage and farmgate product, along with art, culture, and heritage product.

Areas for enhancement and further development include, in particular, the supply of all-weather experiences, family-friendly things to do, and visitor-ready products along with the introduction of more commissionable (paid) experiences.

2.3.1.1. Supply Assessment

A detailed product audit was completed for the region. The audit is primarily based on an extensive 'data scraping' exercise that leveraged the following sources[12]: the ATDW; TripAdvisor; Google Travel; and Google Maps.

Because the tourism sector is so far-reaching, there are many products, experiences and assets which can be considered tourism based. This audit, has, however, focused on those which are considered primary tourism experiences, that is, those which are marketed and positioned as "things to do" when visitors travel to the Grampians. Those products/experiences which are primarily utilised by the local community have, therefore, been excluded.

Figure 13 illustrates the findings of the attractions audit and demonstrates the following.

- Based on the audit findings, there are 196 tourist attractions in the region.
- Of these attractions, the most common type is Hiking Trails, Nature & Wildlife Areas, comprising just under one quarter (24%) of attractions identified, followed by Playgrounds & Parks (15%), Museums, Mines & Historic Sites (15%) and Waterfalls & Lakes (14%). This reflects the strong profile the Grampians has as a nature-based destination.
- The vast majority of products and experiences are located within the town centres around the Grampians region including Ararat, Halls Gap, Hamilton, Horsham, and Stawell. The potential exists for far better connectivity between town centres and key destinations to encourage greater dispersal and discovery of the broader region. While the product is primarily clustered around the major towns throughout the region, the major cluster of accommodation outlets is around Halls Gap, which acts as the hub for Grampians (Gariwerd) National Park. This area comprises 23% of all products identified and is the major visitor hub for the region with many walkers/hikers starting their in-park experience from Halls Gap.
- A top-line assessment of free versus paid products[13] was undertaken. This demonstrated that an estimated 77% of the region's tourism product is free versus 23% being paid. While having 'free things to do' in a region is an important part of a region's product mix, greater economic benefit tends to be generated through commissionable tourism experiences. This is because of visitor spending on the product, the ability for wholesalers to package products is greater and the ability to reinvest in the product is greater.

2.3.1.2. Sentiment Assessment

A sentiment assessment was also completed on products that had more than five reviews available (see Appendix 3 for an overview of how net promoter scores [NPS] are calculated). The results are summarised in Figure 13 and demonstrate the following.

- The Grampians' experiences/attractions product receives an overall NPS of +59, based on 28,733 reviews. This is a good NPS rating and rates well above the accommodation NPS achieved (+46).
- The product category which receives the highest average NPS score is 'Tour Operators", with a very high NPS of +96. This is based on 180 reviews across 6 different operators.
- The product category with the lowest average NPS is 'Recreation.' However, the score (+44) is still in the range of a good NPS.
- Paid product has a higher average NPS (+73) than free product (+55) reflecting consumer willingness to pay for product that is of a high enough quality/standard.

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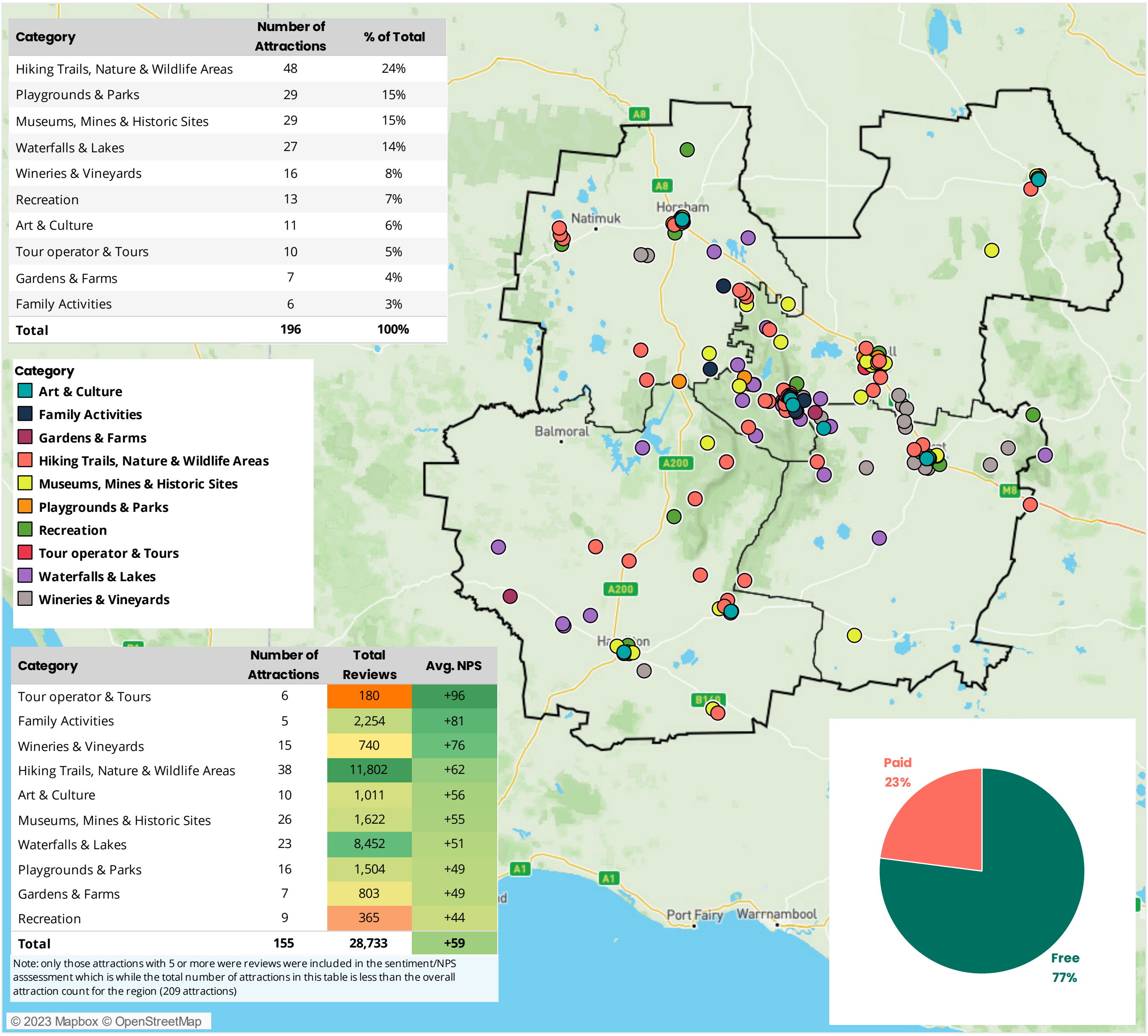
[12] It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online. The audit was conducted in April 2023.
[13] We note that the GPT can be undertaken as a free experience, a self-guided but paid experience or as an operator guided experience with higher fees paid. Consumer sentiment illustrates that guided – paid for experiences tend to generate a far higher level of visitor satisfaction than free experiences, generally. At the moment, the region has few paid for experiences and many free experiences.

Figure 13: Grampians Region Attractions Audit



Category	Number of Attractions	% of Total
Hiking Trails, Nature & Wildlife Areas	48	24%
Playgrounds & Parks	29	15%
Museums, Mines & Historic Sites	29	15%
Waterfalls & Lakes	27	14%
Wineries & Vineyards	16	8%
Recreation	13	7%
Art & Culture	11	6%
Tour operator & Tours	10	5%
Gardens & Farms	7	4%
Family Activities	6	3%
Total	**196**	**100%**

Category
- Art & Culture
- Family Activities
- Gardens & Farms
- Hiking Trails, Nature & Wildlife Areas
- Museums, Mines & Historic Sites
- Playgrounds & Parks
- Recreation
- Tour operator & Tours
- Waterfalls & Lakes
- Wineries & Vineyards

Category	Number of Attractions	Total Reviews	Avg. NPS
Tour operator & Tours	6	180	+96
Family Activities	5	2,254	+81
Wineries & Vineyards	15	740	+76
Hiking Trails, Nature & Wildlife Areas	38	11,802	+62
Art & Culture	10	1,011	+56
Museums, Mines & Historic Sites	26	1,622	+55
Waterfalls & Lakes	23	8,452	+51
Playgrounds & Parks	16	1,504	+49
Gardens & Farms	7	803	+49
Recreation	9	365	+44
Total	**155**	**28,733**	**+59**

Note: only those attractions with 5 or more were reviews were included in the sentiment/NPS asssessment which is while the total number of attractions in this table is less than the overall attraction count for the region (209 attractions)

2.3.2. Accommodation

There are several gaps in the Grampians' accommodation offering and this has a bearing on the type of visitors attracted to the region and the numbers staying overnight. These gaps include the typology of properties on offer along with the size/scale of product offered.

For the region to continue to attract a contemporary visitor market and to grow visitor yield, there is a need to stimulate investment into existing accommodation stock and to introduce new accommodation properties. It needs to be recognised that most regions throughout Victoria are competing to attract new or refreshed forms of accommodation products which is seen as a clear product gap.

2.3.2.1. Supply Assessment

A detailed accommodation audit was completed for the region. The audit is primarily based on an extensive 'data scraping' exercise that leveraged the following sources[14]: the ATDW; AirDNA, TripAdvisor; Google Travel; and Google Maps.

The audit revealed the following (Figure 14).

- The Grampians' accommodation mix is largely supplied through short-term holiday rentals (65%), primarily via Airbnb. Airbnb data indicates there are approximately 503 self-contained units, apartments, shared rooms and houses across the region, the majority of which are for entire homes (79%).
- Northern Grampians Shire has the vast majority of Airbnb stock, with almost half (45%) of properties listed being within this shire – and the bulk of which are in Halls Gap and surrounds.
- While Airbnbs account for 65% of properties, their room stock comprises only 36% of bookable units. Motels, on the other hand, account for 8% of properties but their room stock comprises 31% of bookable units. This demonstrates the importance of commercial properties in supplying year-round larger-scale, bookable room stock for tourism regions.
- Only 35% of the region's accommodation supply is provided through commercial (non-Airbnb) accommodation, the majority of which includes boutique cottages and B&Bs, standard/mid-scale motel/motor inns, and national park campgrounds.
- While Airbnb accommodation is an important component of the Grampians' accommodation mix, the dominance of this accommodation typology has created several challenges, particularly in areas such as Halls Gap where the mix of resident housing, Airbnb stock and commercial accommodation appears to be out of kilter.
- With more private homes being turned from longer-term rental properties to short-stay Airbnbs, this is adding to the challenge faced by the region of lack of worker accommodation for not only the hospitality sector but all sectors of the economy.
- The data also demonstrates a large gap in the supply of hotels and lodges and resorts, comprising only 2% and 3% of commercial stock identified for the region. These are required to meet current visitor demand and to attract higher-yielding visitor markets including several of the target markets identified in this DMP along with those identified in Experience Victoria 2033. Much of the region's accommodation stock is tired and in need of reinvestment to meet current visitor expectations.
- Unlike many other regions in Victoria, the lack of branded hotel and resort properties is also noticeable, which places far greater reliance on GT and the four councils to promote the region. Branded hotel properties especially, have the ability to leverage their extensive loyalty program databases to market their properties (and the region) both nationally and internationally and are able to help expand the marketing of the region including in partnership with GT and councils.

2.3.2.2. Sentiment Assessment

A sentiment assessment was also completed on products that had more than five reviews available (see Appendix 3 for an overview of how net promoter scores [NPS] are calculated). The results are summarised in Figure 14 and the findings are as follows.

- The region's commercial accommodation product receives an overall NPS of +46, based on 26,160 reviews. While this falls within the 'good' range for NPS scores, based on Stafford's work completing accommodation audits throughout the country, this is towards the lower end of overall average NPS ratings.
- The category that received the highest average NPS score is Boutique Properties closely followed by Lodges & Resorts. Both these categories receive a relatively strong NPS of +61 and +59 respectively, reflecting a higher degree of consumer satisfaction. This is based on 2,622 reviews across 51 properties for Boutique Properties and 1,184 reviews across 9 properties for Lodges & Resorts. Comparing these upper-end scores with other regions, these are fairly low average scores. By way of example[15]:
    - Waiheke Island, a nature-based destination in NZ, scored upper-end average scores of +90 for its Luxury Properties and +70 for its Boutique Properties.
    - The Snowy Mountains in NSW received upper-end scores of +68 for its Farm Stay Properties and +90 for its Retreats, Lodges, and Resorts.

[14] It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online. The audit was conducted in April 2023.

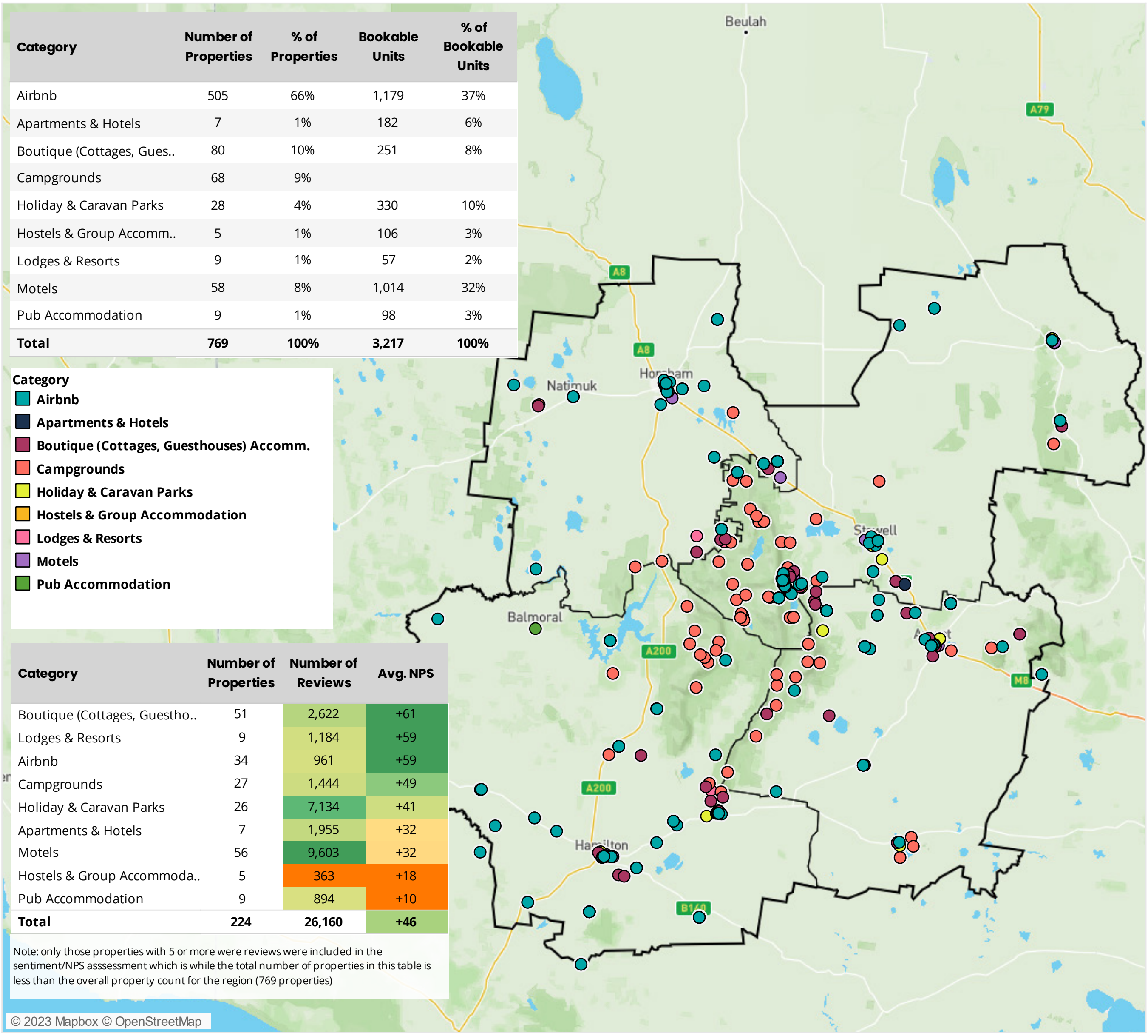
[15] Based on NPS assessments completed in Stafford.

- The East Gippsland region received an upper-end score of +64 for its Boutique Properties.
- The NSW North Coast region received upper-end NPS scores of +74 for its boutique product and +72 for its holiday home product.
- Sunshine Coast and Noosa received upper-end NPS scores of +75 for its boutique product, +72 for its holiday homes and +70 for its speciality lodging product.

▪ Motels, which make up the largest proportion of bookable unit stock throughout the region receive a relatively low NPS of +32 (based on 9,603 reviews). This indicates that there may be concerns from consumers regarding the quality and price proposition of motel properties in the region (i.e., the price-to-value proposition may be out of kilter for some motels).

▪ Pub accommodation receives the lowest NPS score of +10 based on 894 reviews. This is a common finding across most destinations in regional parts of Australia as pub accommodation is often not a focus for property owners, with pubs generating their revenue at the bar or in their restaurants.

Figure 14: Grampians Accommodation Audit[16]



Category	Number of Properties	% of Properties	Bookable Units	% of Bookable Units
Airbnb	505	66%	1,179	37%
Apartments & Hotels	7	1%	182	6%
Boutique (Cottages, Gues..	80	10%	251	8%
Campgrounds	68	9%		
Holiday & Caravan Parks	28	4%	330	10%
Hostels & Group Accomm..	5	1%	106	3%
Lodges & Resorts	9	1%	57	2%
Motels	58	8%	1,014	32%
Pub Accommodation	9	1%	98	3%
Total	**769**	**100%**	**3,217**	**100%**

Category	Number of Properties	Number of Reviews	Avg. NPS
Boutique (Cottages, Guestho..	51	2,622	+61
Lodges & Resorts	9	1,184	+59
Airbnb	34	961	+59
Campgrounds	27	1,444	+49
Holiday & Caravan Parks	26	7,134	+41
Apartments & Hotels	7	1,955	+32
Motels	56	9,603	+32
Hostels & Group Accommoda..	5	363	+18
Pub Accommodation	9	894	+10
Total	**224**	**26,160**	**+46**

Note: only those properties with 5 or more were reviews were included in the sentiment/NPS asssessment which is while the total number of properties in this table is less than the overall property count for the region (769 properties)

[16] Note, bookable unit stock for caravan parks reflects bookable cabins only. It does not include camping sites as for most locations, this data was not available.

2.3.2.3. Demand Analysis

Based on growth scenarios for the Grampians region and the supply assessment, it is forecast that the Grampians will require new commercial accommodation to meet changing visitor requirements by 2026. This is based on data sourced from the TRA National Visitor Survey and AirDNA. It also assumes:

- a medium growth visitor demand scenario (see Section 3.2 for visitor growth scenarios) which aligns with the expected doubling of visitation to the Grampians over the period to 2030;
- an average room occupancy of 2.2 visitors per room; and
- that 75% of room stock is marketable and available year-round (this is important because Airbnb stock has been included in the assessment, and Airbnb stock is not always consistently available year-round).

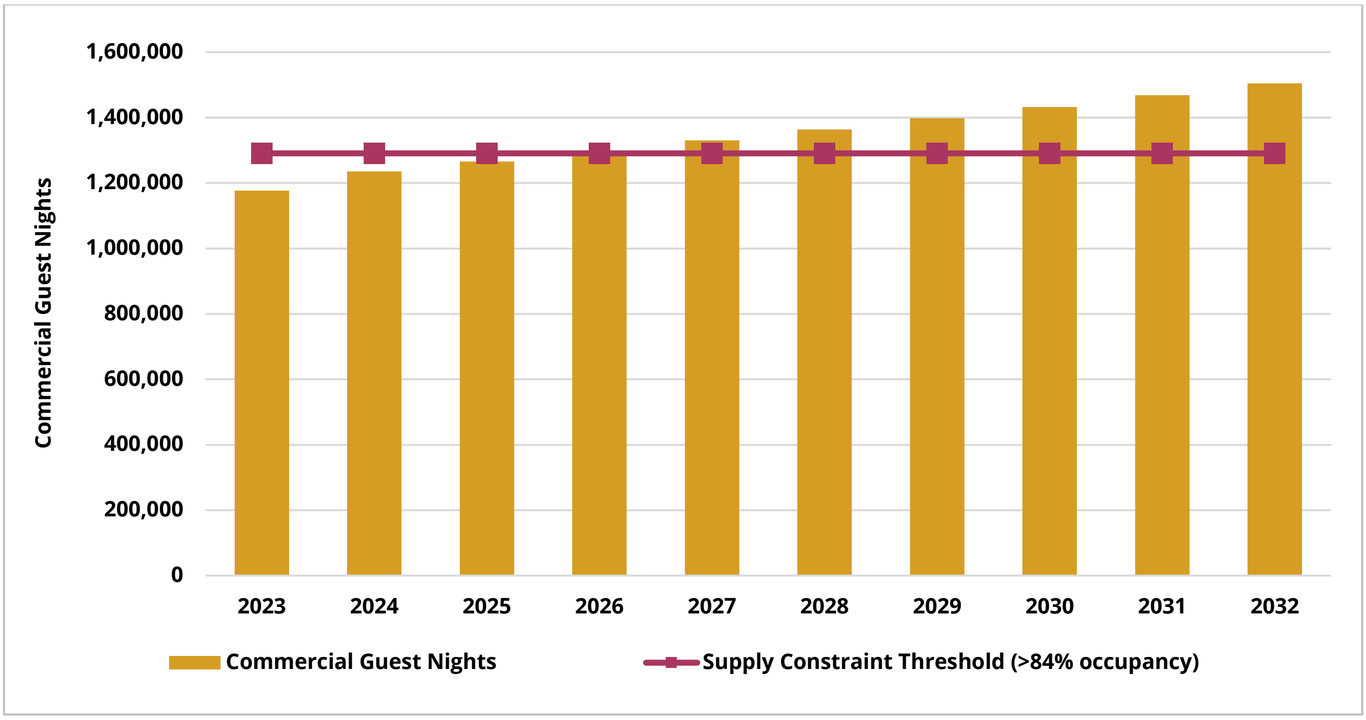
Figure 15 shows the current commercial accommodation supply in the Grampians, measured against demand forecasts for medium scenario growth. This illustrates that an estimated regional occupancy threshold of 85% is reached by 2026 (this level of occupancy reflects when new development and capacity are needed and is a general metric applied across many regions).

Based on this analysis and the gaps identified in this DMP, below is an overview of accommodation typologies that may be supported in the Grampians region to meet the needs of current future visitor markets.

- Luxury Hotels and Resorts
- Resorts
- Boutique Hotels
- Holiday Parks
- Serviced Apartments
- Glamping and Eco-Pods

Accommodation is required at all major towns and destinations across the town centres to support growth and meet current capacity constraints. Reinvestment into existing building stock in town centres and in proximity to key visitor destinations should also be prioritised where possible.

Figure 15: Grampians Accommodation Requirements



2.4. Market Segments and their Personas

Visitors to the Grampians can be broadly grouped into two key markets - Lifestyle Leaders and Habituals. Table 4 provides information on each of these markets.

Importantly, although the Habituals market is not a direct marketing focus for GT (as they have largely already predetermined where they will visit so there is little opportunity to influence their travel decisions), the ongoing development and revitalisation of the Grampians' products, infrastructure and visitor economy offer (as identified in this DMP) will ensure this segment's ongoing satisfaction and propensity to revisit and explore the region.

Table 4: The Grampians' Target Segments and Their Personas

Lifestyle Leaders	Habituals
	
Market size: 1.66m Victorians[17] **Profile:** ▪ They are progressive, educated, and professional individuals who actively seek out new experiences. ▪ They are more likely to be socially aware and they like to shop online. ▪ They are higher in affluence and discretionary expenditure than the average Australian, so travel frequently and spend more when travelling. ▪ They live a busy life, and because success is important to them, they consider themselves leaders more than followers. ▪ They are more likely to travel within Australia for short and long trips compared to the average Australian population. ▪ They are a self-drive market. **What the market wants:** ▪ When they travel, they like to stay active, and the majority like to experience the local culture and see nature. ▪ They like to plan for their trips and are less likely to prefer to have their trips organised for them. ▪ They are open to trying new things and believe that quality is more important than price.	**Market size: n/a** **Profile:** ▪ They are a traditional Grampians visitor who travels to the Grampians at least once every two years - the Grampians' biggest advocate. ▪ They are primarily travelling for a holiday. ▪ They are more likely to be in a family group followed by travelling as a couple. ▪ They typically comprise Active families and couples. ▪ They are most likely to be from Victoria. ▪ They are a self-drive market. ▪ They are strongly influenced by the recommendations of friends and family members. ▪ They tend to return to a consistent location and often travel with the same group. **What the market wants:** ▪ When they travel, they prioritise value for money and want access to quality but price-competitive accommodation options. ▪ They want destinations, facilities, and experiences that are more family friendly. ▪ They are seeking to have fun and reconnect as a family. ▪ They are driven by familiarity with a destination.

[17] https://assets-corporate.visitvictoria.com/images/Visit-Victoria_Stay-Close-Go-Further_Frequently-Asked-Questions.pdf

Image credit: Reed Lookout, Visit Victoria

Part 3: Where Do We Want To Be?

3.1. Strategic Framework

The following strategic framework has guided the development of this DMP and should be used to direct tourism development in the Grampians region going forward.

Vision **The Grampians will be recognised as one of Australia's premier, sustainable nature-based and First Peoples' tourism destinations, allowing visitors to experience abundant nature and rich culture that is supported by a connected and thriving industry.**

Strategic Objectives

1. Facilitate investment in the visitor economy that positions the Grampians as an attractive place to live, work, visit and play.
2. Support First Peoples-led product development and delivery of tourism experiences.
3. Achieve sustainable visitation patterns by growing visitor dispersal and off-peak visitation to support business sustainability.
4. Increase visitor yield by growing visitor dwell time and growing overnight visitation.
5. Generate investment in supporting infrastructure that will enable visitor economy growth.
6. Support a cohesive, integrated, and supported industry and community.

Targets

The following performance targets have been identified for the Grampians.

754,000 to 905,000

20% Growth
In overnight visitors to the Grampians between 2022 and 2030.

$273m to $355m

30% Increase
In visitor expenditure in the Grampians between 2022 and 2030.

2.6 nights to 3.1 nights

20% Growth
In the average length of stay in the Grampians between 2022 and 2030.

Themes

Key themes to guide future investment in the Grampians have been identified. These have been selected in response to strategic considerations and objectives for tourism development and to align with Experience Victoria 2033.

1. **Nature, Recreation and Wellness**
2. **First Peoples**
3. **Food and Drink**
4. **Arts and Culture**
5. **Regional Accommodation**
6. **Identity, Marketing and Placemaking**
7. **Industry Development and Collaboration**
8. **Supporting Infrastructure**

Table 5 provides more information on each of the Strategic Investment Themes that have been identified for this DMP.

Table 5: Strategic Investment Themes – More Detail

	Strategic Investment Theme	Detail
1	**Nature, Recreation and Wellness**	Continue to showcase and celebrate the Grampians' spectacular natural environment by encouraging immersive nature-based experiences and delivering supportive infrastructure, facilities, and services to create unmatched and sustainable nature-based, recreational, and complementary wellness experiences.
2	**First Peoples**	Be led by the Grampians' First Peoples' communities to support distinctive and authentic First Peoples' experiences, to build a greater understanding of their stories in both historical and contemporary forms.
3	**Food and Drink**	Elevate the region's food and drink experiences to showcase the quality produce and provenance available and more strongly connect this with the place and people that lie behind the food.
4	**Arts and Culture**	Continue to foster the development of the Grampians' emerging and diverse arts and culture scene via its many art galleries, museums, art trails, performing art venues and cultural facilities, connecting visitors with authentic, local experiences, and encouraging them to disperse throughout the region.
5	**Regional Accommodation**	Focusing on the development of additional accommodation supply for the Grampians, including (but not limited to) larger scale, CBD-based hotel properties, higher-end resort/villa accommodation, destination holiday park accommodation, tiny home-style/off-grid accommodation, glamping-style accommodation along with the retrofitting of existing properties.
6	**Identity, Marketing and Placemaking**	Continue to grow awareness of the Grampians brand to ensure it is well-recognised and known as a compelling visitor destination.
7	**Industry Development and Collaboration**	Fostering the development of the Grampians' industry via ongoing engagement, collaboration, and training to develop a strong and visitor-ready industry across the region.
8	**Supporting Infrastructure**	Supporting visitor economy growth by advocating for investment into infrastructure, transport connections and visitor services.

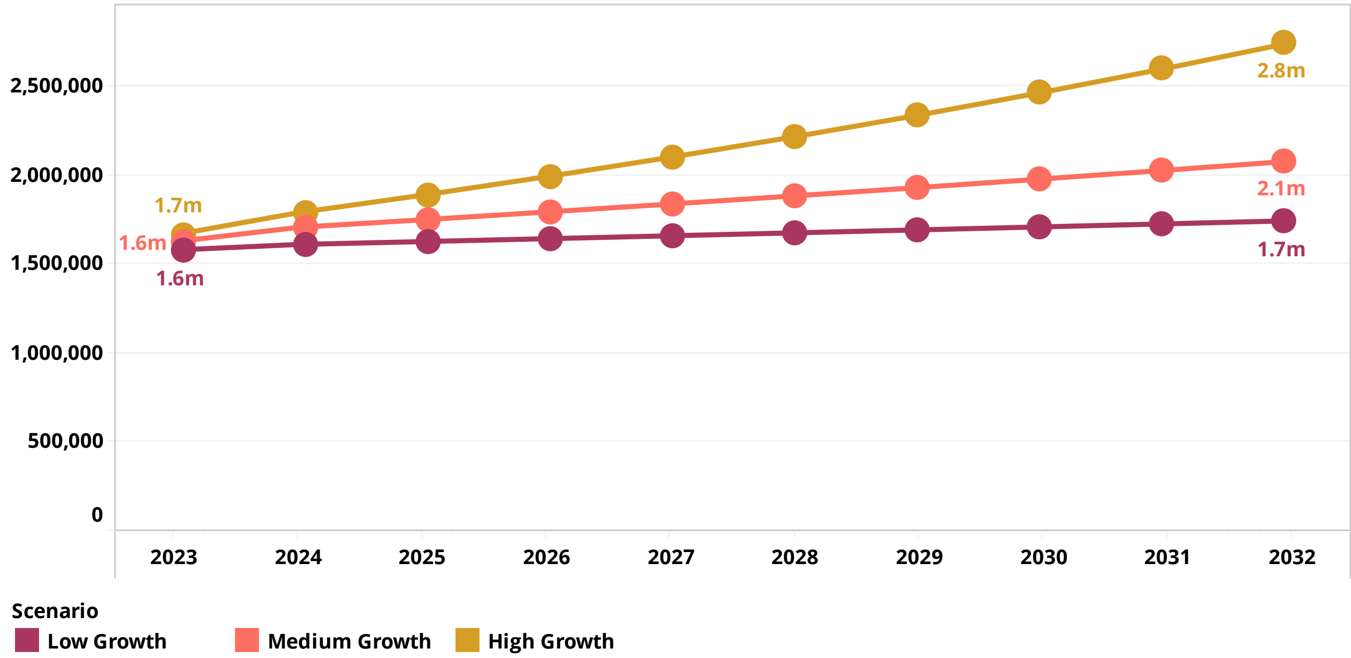
3.2. Visitor Forecasts

Figure 16 provides forecasts for visitor trips to the Grampians over the period 2023 to 2032. The forecasts are based on three different scenarios being a low, medium, and high growth. When reviewing the forecasts, it is important to note that some LGAs were not as impacted (in terms of overall visitation) by COVID-19 as others, and some have rebounded more quickly than others.

The data reflects the following.

- The low growth scenario reflects a much more conservative recovery from COVID-19 and ongoing growth, with 4% growth from 2022 – 2024 followed by a growth of 2% per annum for each year thereafter. It reflects far stronger interstate visitor growth by Victorians and outbound international travel as most countries open in 2022-2023.
- The medium growth scenario reflects a more likely recovery scenario. Under this scenario, growth is modelled at 6% for the three years between 2022 and 2024, followed by a growth rate of 4% per annum for each year thereafter. This scenario assumes a number of new accommodation facilities get established over the next 8-year period and many existing facilities are refurbished. It also assumes a strong marketing campaign is maintained for the GPT and various regional major events are extended and receive strong promotion.
- The high growth scenario sees a much stronger COVID-19 recovery of 10% per annum between 2022 and 2024, followed by a growth of 7% for each year thereafter. This scenario assumes a number of new attractions are established coupled with far faster development of new forms of accommodation. It also assumes that new private sector commercial operators are encouraged to operate within the national park and major urban towns and other development proposed by various councils in the region is activated (such as the Horsham City to River Masterplan, improved pedestrianisation in Halls Gap, streetscape upgrades in Hamilton etc.). The high growth scenario is more aspirational and requires the faster activation of more new tourism products throughout the region.

Figure 16: Visitor Forecasts, 2023 - 2032[18]



[18] Derived by Stafford based on historic data from Tourism Research Australia (National and International Visitor Surveys) and COVID-19 recovery forecasts

Image credit: Visit Victoria

Part 4: How Will We Get There?

4.1. Recommendations

4.1.1. Overview

A wide variety of recommendations have been identified through consultation, research, and analysis completed for this DMP. These recommendations have been categorised according to whether they are Development Projects or Strategic Initiatives:

- **Strategic Initiatives (◆)** reflect those recommendations that are the building blocks to support a visitor destination and, while not being major "ribbon-cutting" projects, they are necessary to ensure a successful destination management approach is achieved.
- **Development Projects (○)**, on the other hand, reflect physical projects such as new or enhanced accommodation, tourism attractions or events (for example).

Action plans have been prepared to guide the delivery of projects under each Strategic Investment Theme identified in Section 3.1.

4.1.1.1. Timeframes

Projects have been identified using the following priority levels. Projects have been identified using the following timeframes.

- Short-term: 1 – 2 years.
- Medium-term: 3 – 5 years.
- Long-term: 6 years and beyond.

4.1.1.2. Responsibility

The stakeholder(s) listed under the "who" column have been noted as the potential drivers of the action/recommendation. This does not mean they are the funder of the recommendation or that they should be the only stakeholder involved in achieving that recommendation.

4.1.1.3. Cost Estimates

Estimated costs for the development and/or the completion of business cases/feasibility studies to progress projects have also been outlined. These are estimates only that need to be confirmed by more in-depth analysis.

4.1.1.4. How recommendations were prioritised

4.1.1.4.1. Prioritising the Strategic Initiatives

While all the Strategic Initiatives are considered important, there were a number that were identified during the consultation phase that appear to require more immediate attention. These were selected as the Priority Strategic Initiatives as they address critical issues or opportunities for the Grampians and have been prioritised above others.

4.1.1.4.2. Prioritising the Development Projects

To determine the priority Development Projects, each has been assessed against the weighted criteria outlined in Table 6. A weighted score has been used to reflect that some of the criteria have a stronger positive impact or a higher level of importance to each stakeholder than others.

Where possible, the assessment has utilised quantitative data (particularly for those projects where feasibilities or business cases have been developed). In the absence of such assessments, however, a qualitative assessment has been undertaken based on local knowledge, stakeholder consultation, professional experience, and a general assessment of the perceived benefits. All projects will need to have feasibility studies and business cases to ensure they are viable and able to deliver desired outcomes.

The full project ranking matrices are included in Appendix 4 and 5.

Table 6: Recommendation ranking criteria

Criteria	Score	Weighting	Description
Ability to encourage stronger international visitation	None = 0 Low = 1 Medium = 2 High = 3	2	Projects that are likely to encourage a higher international visitation and generate stronger profile are ranked higher.
Ability to encourage stronger interstate visitation	None = 0 Low = 1 Medium = 2 High = 3	3	Projects that are likely to encourage higher interstate (rather than intrastate and local) visitation are ranked higher.
Ability to grow visitor yield	None = 0 Low = 1 Medium = 2 High = 3	5	Projects that are more likely to encourage visitation by those markets that typically spend more are ranked higher.
Ability to secure government funding for the project	None = 0 Low = 1 Medium = 2 High = 3	2	Projects that may be more likely to secure government funding (capex or opex) are ranked higher.

Criteria	Score	Weighting	Description
Alignment with Experience Victoria 2033	None = 0 Low = 1 Medium = 2 High = 3	4	Projects that align with Experience Victoria 2033 are ranked higher.
Catalyst project to stimulate other investment projects	None = 0 Low = 1 Medium = 2 High = 3	5	Projects that are more likely to encourage additional or complementary investment into other projects are rated higher.
Dispersal of visitors	None = 0 Low = 1 Medium = 2 High = 3	4	Projects that are able to encourage higher visitor dispersal throughout the region are ranked higher.
Employment (operational) potential	None = 0 Low = 1 Medium = 2 High = 3	3	Projects that are likely to generate greater employment opportunities once operational are ranked higher.
Estimated visitation	None = 0 Low = 1 Medium = 2 High = 3	4	Projects that are likely to generate higher visitation are ranked higher.
Landowner	Parks VIC = 0 Unknown = 1 Council = 2 Other Govt. Agency = 2 Private = 3	2	Projects that are situated on private land are ranked higher because there are likely to be fewer constraints.
Level of private investment required (as a % of total investment)	Very low or None = 0 Low = 1 Medium = 2 High = 3	4	Projects that are more likely to attract private sector investment (regardless of the value of this investment) are ranked higher.
Level of public investment Required (as a % of total investment)	Very low or None = 3 Low = 2 Medium = 1 High = 0	4	Projects that have a higher public sector investment requirement are ranked lower.
Likelihood to be profiled by Visit Victoria	None = 0 Low = 1 Medium = 2 High = 3	2	The ability of the project to grow the region's destination profile. Projects that may have higher marketing budgets (particularly those run by larger tourism players), as well as highly unique products, are ranked higher.
Regionally significant, all-weather attraction for the Grampians	None = 0 Low = 1 Medium = 2 High = 3	5	Projects that will result in a regionally significant, all-weather visitor attraction for the Grampians are ranked higher.
Requirement for ongoing operational government funding	None = 3 Low = 2 Medium = 1 High = 0	2	If the project is likely to require ongoing government contributions to fund operating costs, it is ranked lower. If the project is likely to be commercially viable/sustainable, it is ranked higher.
Short term project commencement	Yes = 1 No = 0	4	If the project is likely to be able to be activated in a shorter period, it is ranked higher.
Uniqueness of product	None = 0 Low = 1 Medium = 2 High = 3	4	The uniqueness of the product is ranked according to whether it is unique across Victoria (ranked higher), across the region, or whether the product is likely to be unique only to the specific area it is situated in (ranked lower).

4.1.2. Theme 1: Nature, Recreation and Wellness

The Grampians is already well recognised for its natural amenity including impressive national parks, walking trails, lakes and waterways. Nature-based tourism is and will continue to be a major driver of visitation for the region.

This theme focuses on recommendations that will continue to showcase and celebrate the Grampians' spectacular natural environment by delivering immersive nature-based experiences through product development and delivering supportive infrastructure, facilities, and services to create unmatched and sustainable nature-based and recreational experiences.

It also focuses on the emerging wellness market in the Grampians, which includes geothermal baths, day and overnight spas, and mindfulness retreats. This product has the potential to be packaged with the region's walking products to encourage longer visitor dwell time and stronger yield.

4.1.2.1. Priority Recommendations

The following are the priority recommendations under the Nature Recreation and Wellness Theme. They have been prioritised using the detailed project ranking matrix included in Appendix 4 and 5.

Dunkeld geothermal bathing experience: Spa tourism is in its relative infancy in Australia but is a growing market and a higher-yielding sector. This growth is underpinned by the increasing affluence of Western society and the desire for self-care. Internationally, there are many examples of successful spa resorts and towns, based on both geothermal and natural mineral water supply, and the market continues to gain momentum.

Victoria offers a climate that makes it ideal to leverage this growth with several higher-quality spa destinations including Daylesford, the Macedon Ranges, and the Mornington Peninsula, as well as various experiences in Melbourne, on the Great Ocean Road, in Gippsland and the Murray region. The Grampians not only offers a climate that is suited to geothermal spa experiences but also has a product base and brand positioning that strongly complements this type of product with its strong nature tourism themes and landscapes. The market attracted to spa tourism is generally a higher-yielding market with a propensity to spend on higher-quality accommodation options and related quality food and beverage services.

The Southern Grampians or Horsham regions appear to be best suited out of the four LGAs for the development of a geothermal spa experience given its ground temperatures and based on geothermal mapping in the region. Both have a geothermal capacity which could offer hot pools and spa facilities.

Dunkeld would be an ideal location given the Royal Mail Hotel's fine dining experience and the strong synergies this has with a high-quality spa experience, but other locations should be tested.

The geothermal spa experience could include a day spa, wellness centre and/or hot pools facility to support the venue being positioned as a holistic health and wellness location. It could also potentially be marketed as a venue for medical tourism to support those recuperating from medical procedures and often staying in nearby accommodation.

This product would strongly complement the GPT offering and could be packaged as part of the experience, enabling walkers to undertake a high-quality spa experience post their walk and as a recovery and relaxation tool.

Indoor activity centre: Aside from free outdoor activities, the region currently offers limited family-friendly activities, and virtually no indoor all-weather experiences, aside from galleries and museums which are very passive in their offering.

While visitors love Halls Gap and its accessibility to Grampians (Gariwerd) National Park, there are limited things to do when the weather conditions make undertaking activities within the National Park problematic.

To leverage Halls Gap's profile as a nature-based recreational hub, and to grow the connectivity between Ararat, Pomonal and Halls Gap, the opportunity exists to investigate the development of an indoor activity centre that would not only provide an all-weather attraction but also a year-round activity for visitors and locals to participate in across all seasons. It is currently proposed that this be developed in Ararat where ARCC are keen to pursue this as a priority investment project.

This facility could offer rock climbing, bouldering, high ropes, aerial courses, trampolining etc. It may also be used as an official training base for institutes of sport with the potential to eventually morph into a high-performance sports centre. It could provide an important training space for various other sportspeople when not in general use so may have several complementary user groups to appeal to.

The ability to offer rock climbing could also potentially address some of the challenges associated with rock climbing in Grampians (Gariwerd) National Park by offering visitors and locals an alternative and safer option.

As this facility could offer a variety of paid attraction uses and government sports centre facilities, it should be developed as a public-private partnership project and with the potential to develop it in stages.

The Bath House Pomonal: The Bath House Pomonal has been proposed by a private developer and is set to open in 2024. It will offer panoramic views of Mount William and Redman Bluff and guests will be allocated one of six private bathing suites which can be booked for up to six people, as well as their own relaxation lounge with gastronomy options and herbal teas.

The project has received grant funding through the state government's Enabling Tourism Fund and should continue to be supported as this will provide the Grampians with an additional all-weather experience that aligns with Experience Victoria 2033.

It is also a potential key project to strengthen the link between Pomonal and Halls Gap as a tourism route to eventually offer a produce trail, cycleway, and walking trail.

Table 7: Theme 1 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
○	Activation of the Wimmera River in Horsham	▪ Identify potential river-based tourism infrastructure and products that could be introduced to further activate the Wimmera River such as kayaking and paddle boarding	$120k	HRCC	Medium term
○	Agridome showcase attraction	▪ Undertake a business case and feasibility to assess the potential for an agridome showcase visitor attraction. ▪ Assess potential grant funding streams that could support the concept.	$12.0m for development and $65k for the business case and feasibility	SGSC	Medium-long tern
○	Ararat Dirt Mountain Bike 12 Hr Race	▪ Prepare a business plan for the future development of the Ararat Dirt Mountain Bike 12-Hr Race as per the Grampians Region Cycling Masterplan.	$100k	ARCC	Medium term
○	Ararat skate park event	▪ Introduce a skate park event that leverages the high-quality Ararat skate park and engages youth.	$45k	ARCC	Medium term
○	Ararat Sky Park	▪ Continue to work with the investor to facilitate the development of the Sky Park experience in Ararat.	$10.0m	ARCC	Medium term
○	Ararat Trails Mountain Bike Park	▪ Continue to work with PV to support the development of Ararat Trails Mountain Bike Park.	$3.0m	PV, ARCC	Medium term
○	Ararat Hill Climb event expansion	▪ Identify potential enhancements that could grow the Ararat Hill Climb event and its profile.	$250k	ARCC	Medium term
○	Dunkeld geothermal bathing experience ★	▪ Identify potential sites for the experience. ▪ Prepare investment prospectus to identify opportunities and encourage operators and their investors.	$7.5m	SGSC	Medium term
○	Dunkeld nature playground	▪ Commission the design of a potential nature playground for Dunkeld. ▪ Identify potential grant funding streams to fund the development of the playground.	$250k	SGSC	Medium term

Type	Recommendation	Action	Estimated Cost	Who	When
○	Equine trails with tours	▪ Audit the equine trails available in the region. ▪ Develop marketing collateral to profile the trails.	$100k	ARCC, HRCC, NGSC, SGSC and GT	Short-medium term
○	Expansion of gliding and fixed aviation events	▪ Promote opportunities for gliding and fixed aviation events.	$65k	HRCC	Medium term
○	Indoor activity centre ★	▪ Identify potential sites that are zoned appropriately for the proposed development of an indoor attraction including potentially a climbing wall, bouldering, trampolining etc ▪ Prepare investment prospectus to identify opportunities and encourage operators and their investors.	$4.5m	ARCC	Short - medium term
○	Grampians Road Cycling Granfondo Event	▪ Prepare a business plan for the future development of the Grampians Road Cycling Granfondo Event as per the Grampians Region Cycling Masterplan.	$200k	GT, ARCC, HRCC, NGSC, SGSC	Medium term
○	Grampians Rail Trail completion (connection from Stawell to Halls Gap)	▪ Continue to advocate for the completion of the Grampians Rail Trail as per the Grampians Region Cycling Masterplan. ▪ Identify potential grant funding streams to fund the completion of the trail.	$500k	NGRC	Medium - long term
○	Great Trail development	▪ Commission the development of the Great Trail Implementation Plan (Stage 1)	$500k	ARCC, HRCC, NGSC, SGSC, GT	Medium term
○	Hamilton Botanic Garden playspace profiling	▪ Commission professional media provider to capture high-quality media of the playspace once development is completed. ▪ Incorporate media into destination marketing for the garden and the LGA. ▪ Ensure media is provided to GT and VV for incorporation into regional and state media databases.	$10k	SGSC	Short term
○	Horsham Motorcycle Club facility improvements	▪ Work with the Horsham Motorcycle Club to prepare a top-line business case to determine needs and demand for facility improvements including admin block, canteen, and medical facilities. ▪ Identify potential grant funding streams to fund the completion of the upgrades.	$1.5m	HRCC	Medium – long term

Type	Recommendation	Action	Estimated Cost	Who	When
○	Horsham Motorsport Raceway development	▪ Work with the Horsham Motorsport Raceway proponents to prepare a top-line business case to determine the needs and demand for the potential raceway. ▪ Identify potential grant funding streams to fund the completion of the raceway.	$3.6m	HRCC	Medium – long term
○	Implementation of the Volcanic Trail Masterplan (including upgrade of Penshurst Volcanoes Discovery Centre)	▪ Continue to advocate for the implementation of the Masterplan. ▪ Identify potential grant funding streams to fund the completion of the Masterplan.	$9.2m	SGSC	Medium - long term
○	Laharum cycle trail linking native flowers and boutique operators	▪ Audit the boutique operators in the Laharum and ascertain interest in being profiled as part of a trail. ▪ Develop a self-guided trail linking interested operators. ▪ Develop marketing collateral to profile the trail.	$55k for audit and trail link, and $25k for marketing collateral	HRCC	Medium term
○	Kara Kara National Park project	▪ Continue to work with PV to facilitate water management to the top dam (Teddington Reservoir). ▪ Continue to advocate for the completion of the project which includes upgrades to campsites and facilities.	$200K	PV, NGSC, Dja Dja Wurrung Clan	Medium term
○	Multi-use trails across SCSC	▪ Continue to develop the 137 km of missing shared user pathways to provide recreation opportunities for the community	$5.2m	SGSC	Medium - long term
○	Nati climbing festival	▪ Prepare a business plan for the future development of a Nati Climbing Festival in conjunction with industry, with the aim of shaping and proving the viability of the concept.	$65k	HRCC	Medium term
○	Orchid tours, orchid house, and spring flower tours	▪ Develop a series of self-guided tours of the region's orchids and wildflowers and develop digital promotional collateral to support these.	$40k	GT, ARCC, HRCC, NGSC, SGSC	Medium term

Type	Recommendation	Action	Estimated Cost	Who	When
○	Queen Mary Botanic Gardens heritage precinct	▪ Undertake a beautification and activation plan for the precinct to include additional alfresco seating, landscaping, public art, and wayfinding at the primary entry point from Melbourne via Sunraysia Highway to create a welcoming, first impression of St Arnaud. ▪ Identify grant funding streams to activate the plan ▪ Look to develop a wayfinding trail that communicates St Arnaud's heritage story and links to the Raillery Gallery and Silo Art Trail in addition to the heritage precinct circuit.	$50k for the plan and $500k for activation and marketing	NGSC	Medium term
○	Reassessment of GPT 2-3-day hikes from Dunkeld	▪ Undertake site assessment and development requirements. ▪ Marketing program to encourage Dunkeld as a gateway to the GPT.	$25k for site assessment and $35k for marketing program	SGSC	Short – medium term
○	Recreational fishing and competition	▪ Prepare a business plan to assess the potential of a recreational fishing competition in the region.	$65k	ARCC, HRCC, NGSC, SGSC, GT	Medium term
○	Stawell Gift enhancements	▪ Identify potential enhancements that could further grow the Stawell Gift event and its profile.	$95k	NGSC	Short-medium term
○	The Bath House Pomonal ★	▪ Continue to support the operator/developer of the proposal including planning support. ▪ Identify any grant funding sources that may assist the operator/developer.	$4.0m	ARCC	Short – medium term
○	The Zoo Trail development	▪ Complete the detailed design and planning to enable Council to reach a decision on whether to apply for funding to deliver a footpath/cycling trail to link Halls Gap to the Halls Gap Zoo. ▪ If a favourable result, apply for grant funding to implement development.	$500k	NGSC	Medium term
○	Updated entrance way & admin building for Halls Gap Zoo	▪ Identify any grant funding sources that may assist the operator/developer.	$1.5m	NGSC	Short - medium term
○	Wimmera River Discovery Trail Stage 2 (Horsham to Dimboola)	▪ Continue to advocate for the development of Stage 2 of the Wimmera River Discovery Trail ▪ Identify any grant funding sources that could supply its development.	$2.0m	HRCC	Medium – long term

○ **Development Projects** ◆ **Strategic Initiatives** ★ **Priority Project/initiative**

4.1.3. Theme 2: First Peoples

The Grampians region has extensive First Peoples' history, with Gariwerd, in particular, being home to the Djab Wurrung and Jardwardjali people for the past 20,000 years.[19] The region is also home to 80% of all First Peoples' rock art in Victoria.[20]

This theme focuses on ensuring the region is guided by the Grampians' First Peoples' communities to support distinctive and authentic First Peoples' experiences, helping to build a greater understanding of First Peoples' stories in both historical and contemporary forms. This will help build awareness of the Grampians', and Victoria's (more broadly), First Peoples' product offering (which is relatively low compared with other jurisdictions such as the Northern Territory and Queensland)[21]. "Being led by Traditional Owners and First Peoples' communities to learn from and celebrate this enduring connection is crucial."[22]

4.1.3.1. Priority Recommendations

The following includes the priority recommendation under the First Peoples' Theme. It has been selected as a priority project using the detailed project ranking matrix included in Appendix 4 and 5 and explained in Section 4.1.1.3.

Brambuk - The National Park and Cultural Centre upgrade[23]: This project involves the upgrade of Brambuk's buildings, the rejuvenation of indoor and garden spaces, the development of cultural programs for First Peoples and the creation of new visitor experiences.[24]

The Centre has an important role in the Grampians' visitor economy and in the local community as a place of cultural strengthening, community, learning, heritage conservation, employment, economic outcomes, and connection to Country.

The project also includes commissioning the development of outdoor art installations, which will be located between the Visitor Centre and Cultural Centre buildings.[25] It will bring together the work of artists from the three Gariwerd Traditional Owner communities into one space to share their connection with Gariwerd Country.

There is a need to continue to advocate and support the strategic partnership committee to deliver the upgrade which may enable the centre to offer expanded First Peoples' arts and cultural experiences and programs, new visitor spaces and facilities, and events.

Industry training with First Peoples and Elders including a cultural induction for Licensed Tour Operators: With the strong regional desire to grow the profile and understanding of the Grampians region as a significant First Peoples' destination, there is a need to ensure that industry is well-trained in the region's First Peoples' extensive history.

The opportunity exists to host a series of workshops with First Peoples' elders and industry operators to enable greater cultural understanding.

Table 8: Theme 2 Action Plan

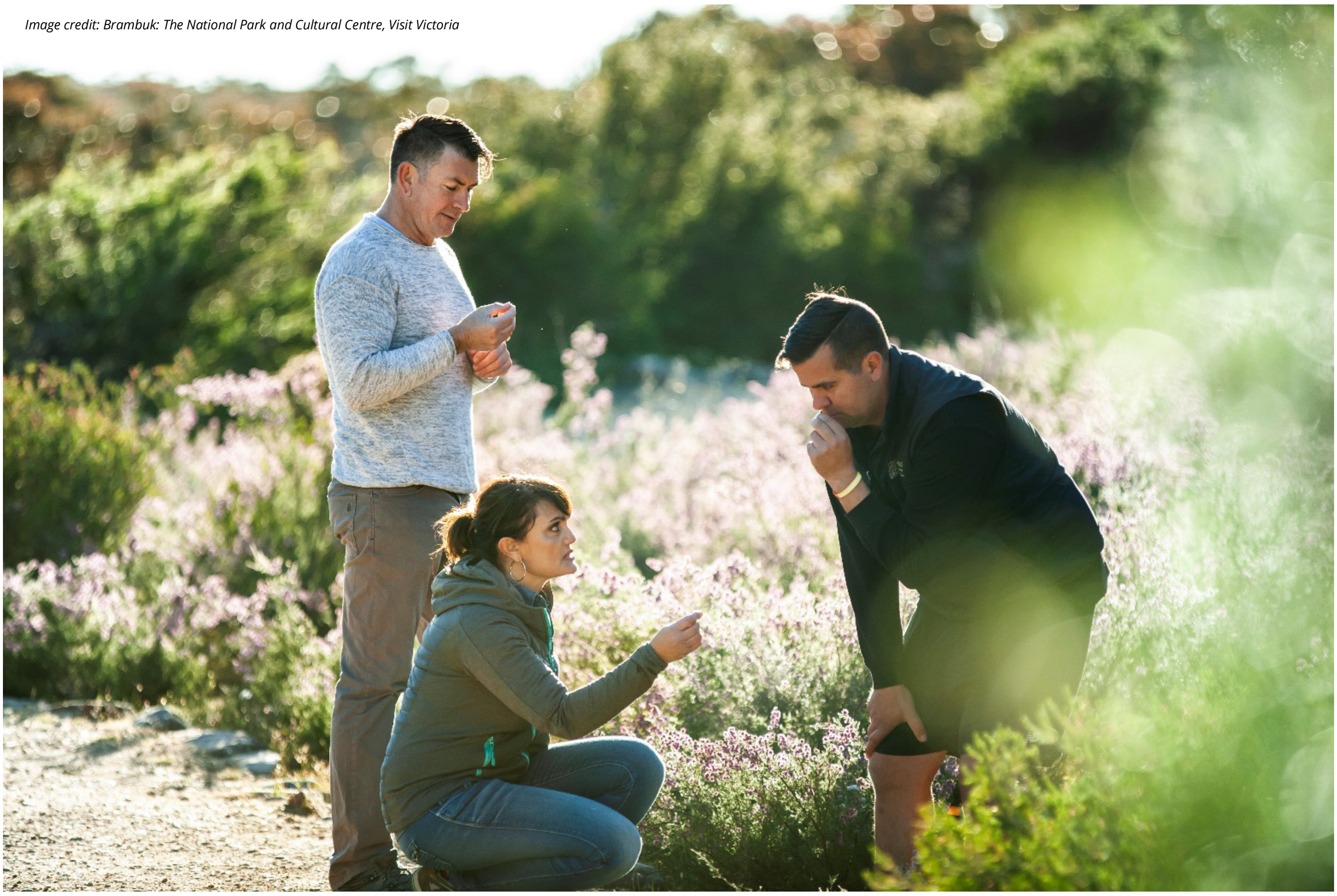
Type	Recommendation	Action	Estimated Cost	Who	When
○	First Peoples' cultural tourism product development	▪ Work with Aboriginal Land Councils (Barengi Gadjin Land Council, Gunditj Mirring Traditional Owners Aboriginal Corporation, Eastern Maar Aboriginal Corporation, Dja Dja Wurrung Clans Aboriginal Corporation) to facilitate, and foster authentic and unique cultural experiences and share their cultural story with visitors when they are ready to do so. ▪ Support and enable the development of each Land Council's tourism aspirations.	$250k	GT, BGLC, GMTO, EMAC, DDWCAC, ARCC, HRCC, NGSC, SGSC, RDV, VV	Medium – longer term
○	Brambuk: The National Park and Cultural Centre upgrade ★	▪ Continue to support the strategic partnership committee and advocate for the development of Brambuk.	$7.0m	PV, TOs	Short-medium term

[19] https://www.dcceew.gov.au/parks-heritage/heritage/places/national/grampians#:~:text=Known%20as%20Gariwerd%20by%20local,Aboriginal%20art%20motifs%20in%20Victoria
[20] https://www.visitgrampians.com.au/see-do/culture/indigenous-culture/aboriginal-rock-art-sites
[21] Visitor Economy Master Plan Directions Paper, page 27.
[22] Ibid
[23] Brambuk: the National Park and Cultural Centre, Barengi Gadjin Land Council, Eastern Maar, Gunditj Mirring Traditional Owners Aboriginal Corporations and Parks Victoria, page 4.
[24] The project is supported by the Victorian Government through the Department of Jobs, Precincts and Regions.
[25] The project is supported by the Victorian Government through Creative Victoria.

Type	Recommendation	Action	Estimated Cost	Who	When
◆	First Peoples' place names	▪ Collaborate with TOs and Land Councils to advocate for more active use of First Peoples' names.	$80k	RDV, PV, TOs, BGLC, GMTO, EMAC, DDWCAC, ARCC, HRCC, NGSC, SGSC	Short – medium term
○	Horsham public art and First Peoples' interpretive content	▪ Work with BGLC to identify First Peoples' interpretive content that could be introduced to sensitively and appropriately share stories and culture.	$120k	BGLC, HRCC	Short-medium term
◆	Industry training with First Peoples and Elders including a cultural induction for Licensed Tour Operators ★	▪ Organise a series of workshops with First Peoples' elders and industry operators to enable greater cultural understanding.	$45k	RDV, GT, VV, TOs, BGLC, GMTO, EMAC, DDWCAC,	Short term

○ **Development Projects** ◆ **Strategic Initiatives** ★ **Priority Project/initiative**

Image credit: Brambuk: The National Park and Cultural Centre, Visit Victoria



4.1.4. Theme 3: Food and Drink

The Grampians has an emerging food sector that is building on its long winemaking history. The yield from visitors that engage with food and drink is significantly higher than those visitors who solely engage with nature-based products. Many parts of the Grampians offer productive agricultural areas and there is a growing potential to link produce-to-plate in the region.

This theme focuses on recommendations to elevate the region's food and drink experiences to showcase the quality produce and provenance available and more strongly connect this with the place and people that lie behind the food.

4.1.4.1. Priority Recommendations

The following are the priority recommendations under the Food and Drink Theme. They have been prioritised using the detailed project ranking matrix included in Appendix 4 and 5 and explained in Section 4.1.1.3.

Ararat Distillery: The Grampians has a solid profile as a wine production and agricultural region. The potential exists to build on this profile and introduce a distillery.

These types of facilities offer an exciting mechanism to encourage more visitors to stop and stay in the area, especially where the facility can also offer tasting sessions, guided tours, meals and a venue for events and functions which support local community needs as well. Using natural ingredients to create unique tastes, from wildflowers, berries, barks etc, the facility could generate both a very strong local market and a seasonal visitor market.

It is understood that a producer in Ararat is interested in developing a distillery and is working with Council to develop a site. This development should continue to be supported and promoted once introduced.

Chocolatarium: To add to the growing food focus in the Grampians, a producer is also investigating introducing a chocolate factory experience in Ararat termed a 'Chocolatrium' and is in the process of looking for a site. This experience would be unique within the region and could offer a highly complementary product to the region's wine offering.

Council should continue to work with the project proponent to identify sites and assist with grant applications where possible.

Expansion of Grampians Food and Drink Packages: There is a desire by many operators to broaden the product and branding focus of the Grampians from big nature to one supported by its complementary product pillars including food and drink. To do this, the opportunity exists to work with Grampians food and drink businesses to package products that will appeal to a visitor market. These packages need to be bookable and actionable rather than just suggested packages.

It is important to note that generally, although the wine offering within the Grampians region is quite well known and respected, the food offering is seen as far more variable both in the range and quality of food experiences.

Grampians Wine Discovery Centre (showcase and attraction): The Grampians wine region has over 150 years of history, with some of the world's oldest vines and is one of the longest continually producing wine regions in Victoria. While our wine and food offering is growing, the Grampians struggles at times to compete with other larger wine regions because of a lack of visible presence.

Many vineyards and winemakers nationwide indicate they are keen to explore tourism uses on-site but are challenged by issues including insurance, finding sufficient staff and biosecurity issues. This is often the case for more boutique producers.

To help overcome this, the potential exists to develop a regional wine and produce showcase centre or emporium. This could feature the region's vineyards, offer a shopfront for the vineyards and, potentially on a rotating basis, offer tastings. To assist with project commercial viability, a pop-up and seasonal facility is suggested until it can be a permanent facility with secure revenue streams. Because of the strength of some of the food producers/growers in the region (olives etc), the potential also exists to investigate including them in the centre so the facility becomes a true showcase of the best of the Grampians' produce.

Table 9: Theme 3 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
○	Ararat distillery ★	▪ Continue to support the operator/developer of the potential distillery including planning support. ▪ Identify any grant funding sources that may assist the operator/developer.	$7.5m est. for development	ARCC, Operator/ Developer	Medium - long term
○	Chocolatarium (chocolate factory) ★	▪ Continue to support the operator/developer of the potential chocolatarium experience including planning support and site identification. ▪ Identify any grant funding sources that may assist the operator/developer.	$5.5m	ARCC, Operator/ Developer	Medium term
◆	Creation of a regional producer's trail	▪ Audit and implement the development of a regional producer's trail for the Grampians. ▪ Commission a professional media provider to capture high-quality media of the trail and its providers. ▪ Incorporate the trail into destination marketing for the Grampians.	$65k	GT, ARCC, HRCC, NGSC, SGSC, RDV, DJSIR	Short – medium term
○	Expansion of food and drink packages for the Grampians ★	▪ Continue to work with the Grampians' food and drink operators and other tourism businesses (accommodation, attractions, transport) to further broaden the range of bookable food and drink packages available to appeal to the domestic and international markets.	$50k	GT, DJSIR	Short – medium term
◆	Grampians regional food strategy	▪ Commission the development of a regional food strategy to identify the strengths of the Grampians as a food region and potential expansion opportunities.	$60k	GT, RDV, DJSIR	Short term
○	Grampians wine cellars profiling	▪ Audit of all regional cellar doors ▪ Development of promotional collateral ▪ Online marketing program	$155k	GT, Grampians Winemakers Inc, Wineries, DJSIR, RDV	Short – medium term
○	Grampians Wine Discovery Centre (showcase and attraction) ★	▪ Work with the region's wine and produce sector to consider commissioning a feasibility study assessing the viability of developing a major wine discovery centre	$18.0m (for the new centre)	Grampians Winemakers Inc, Wineries, GT, RDV	Medium - long term
○	Horsham brewery	▪ Continue to support the existing nano-brewery operator to expand to a larger brewery operation including site identification and planning assistance. ▪ Identify any grant funding sources that may assist the operator/developer.	$7.5m (for the new facility)	HRCC, GT, RDV, operator	Medium – long term

○ Development Projects ◆ Strategic Initiatives ★ Priority Project/initiative

4.1.5. Theme 4: Arts and Culture

The Grampians and its various towns and communities have an emerging and quite diverse arts and culture scene. This is evident in the many art galleries, museums, art trails, performing art venues and cultural facilities available throughout the region.

This theme focuses on continuing to develop this emerging regional strength through the expansion and/or revitalisation of existing facilities along with the development of major new products and the improved profiling and connectivity of existing experiences. This will connect visitors with authentic, local experiences and encourage them to disperse throughout the region.

4.1.5.1. Priority Recommendations

The following are the priority recommendations under the Arts and Culture Theme. They have been prioritised using the detailed project ranking matrix included in Appendix 4 and 5 and explained in Section 4.1.1.3.

Expansion of J Ward Tours: J Ward currently attracts around 10,000 visitors per annum.[26] The attraction is open daily and offers tours operated by the Friends of J Ward. As an indoor, all-weather cultural experience for the region, the potential exists to consider expanding the tour program by investigating ways to refresh the proposition by introducing new tours and new forms of technology to increase its marketability. This could include a comparison against similar attractions globally and looking at best practice features that could be incorporated. There is always a need to refresh and update historic and cultural attraction experiences to also help encourage repeat visitation and attract a wider audience.

Hamilton Gallery revitalisation: Hamilton Gallery, while housing the Shire's significant collection, is no longer fit for purpose to display and store such valuable works with issues including lack of display space for larger exhibitions, storage limitations, climate control issues and limited space for community engagement.

Council is embarking on a redevelopment of the facility to resolve these issues and integrating the site with an adjoining site to create a renewed CBD and a new Gallery at the current site.

The redevelopment will feature a new Digital Hub, Library, Cinema, and office spaces which will also serve as a government hub in Hamilton. Its CBD location will support the broader Council vision for the activation with the development of a vibrant and connected civic precinct.

Table 10: Theme 4 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Ansett Museum feasibility and master plan	▪ Commission the development of a feasibility and master plan to rejuvenate and reimagine the Ansett Museum experience to make it a more diverse and appealing visitor experience.	$250k	Ansett Museum, SGSC	Medium term
○	Art, laneways, and culture tours of Horsham	▪ Develop a series of self-guided art, laneways and culture tours of Horsham and promote these via an online interactive map. ▪ Seek operator interest to run the guided art, laneways, and culture tour of Horsham.	$45k	HRCC	Medium term
◆	Dark Matter Discovery Centre	▪ Continue to support the potential development of a Dark Matter Discovery Centre for Stawell which would create a unique, all-weather attraction for the region.	$2.0m	NGSC	Medium term
○	Elevation of the Nati Frinj Biennale (greater profiling)	▪ Work with Nati Frinj Biennale operator to further elevate the profile of the event including via new marketing channels not previously explored.	$95k	HRCC, GT, Nati Frinj Biennale operator	Short-medium term

[26] https://www.jward.org.au

Type	Recommendation	Action	Estimated Cost	Who	When
○	Expansion of J Ward Ghost Tours ★	▪ Complete a market demand assessment of J Ward's current tour program and penetration rates. ▪ Complete a benchmarking assessment of other similar facilities globally to compare offerings. ▪ Identify potential opportunities to introduce new tours and products at the facility to grow market penetration.	$100k	J Ward, ARCC	Short – medium term
◆	Grampians culture passport ticket	▪ Undertake top-line demand and cost assessment for a regional cultural passport ticket. ▪ If the concept is viable, host a workshop with all Councils and cultural facilities to gauge buy-in and interest and to promote the potential benefits.	$45k	GT, RDV	Short-medium term
○	Hamilton Gallery revitalisation ★	▪ Continue to support and advocate for the planned redevelopment of the Hamilton Gallery.	$4.0m	SGSC	Medium term
○	Hamilton Gardens weekends (public and private)	▪ Working with Hamilton's gardens and potentially transport operators, provide a series of packaged garden tours, and look to re-establish the Hamilton Gardens Weekends.	$50k	SGSC	Short term
○	Railway station/silo art	▪ Look to develop a precinct starting point for the St Arnaud Mural Trail at the Raillery Hub. ▪ Develop a wayfinding Mural Trail to encourage dispersal through the town. ▪ Collaborate with St Arnaud's artistic community groups to develop a proposal for interpretive wayfinding.	$250k	RDV, NGSC	Short-medium term
◆	Regional Dark Tourism Strategy	▪ Develop a dark tourism strategy that pulls together the region's dark tourism product and identifies the best leverage opportunities.	$300k	GT	Short – medium term
◆	Silo trail profiling for Horsham	▪ Commission professional media providers to capture high-quality media of the silo assets in the LGA. ▪ Incorporate silo media into destination marketing for the LGA. ▪ Ensure silo media is provided to GT and VV for incorporation into regional and state media databases.	$65k	HRCC	Short-medium term
○	Story of gold fields and link to the current gold mine	▪ Commission professional media providers to capture high-quality media of the gold fields and mining story in the LGA. ▪ Incorporate this media into destination marketing for the LGA. ▪ Develop self-guided gold field tours incorporating this media.	$150k	NGSC	Medium term
◆	Underground physics lab promotion	▪ Continue to support the ongoing development of the Stawell Underground Physics Laboratory and profile its achievements (with data collection noted as having begun in 2023).	$20k	NGSC	Short-medium term

Type	Recommendation	Action	Estimated Cost	Who	When
○	WAMA - National Centre for Environmental Art	▪ Continue to support and advocate for the development of WAMA. ▪ Profile the facility's development as it occurs to build awareness and excitement.	$9.0m	NGSC	Short - medium term
○	Wesley Performing Arts Centre Refurbishment	▪ Update the business case to support the refurbishment of the Wesley Performing Arts Centre ▪ Identify grant funding sources to support the redevelopment	$2.0m	HRCC	Medium-long term

○ **Development Projects** ◆ **Strategic Initiatives** ★ **Priority Project/initiative**

Image credit: Hamilton Gallery, Visit Victoria

4.1.6. Theme 5: Regional Accommodation

The quality of accommodation throughout regional Victoria remains a challenge, with 68% of regional accommodation being budget or mid-scale.[27] There are a number of gaps in the Grampians' accommodation offering. These gaps include the typology of properties on offer along with the size/scale of product offered. To continue to appeal to a contemporary visitor market and grow visitor yield, there is a need to stimulate investment into existing accommodation stock and to introduce new accommodation properties.

This theme focuses on the development of additional accommodation supply for the Grampians, including (but not limited to) larger scale, CBD-based hotel properties, higher-end resort/villa accommodation, destination holiday park accommodation, glamping-style accommodation along with the retrofitting of existing properties.

4.1.6.1. Priority Recommendations

The following are the priority recommendations under the Regional Accommodation Theme. They have been prioritised using the detailed project ranking matrix included in Appendix 4 and 5 and explained in Section 4.1.1.3.

4-star accommodation at Halls Gap: A new 4-star facility would fill a product gap in the marketplace and offer an accommodation option to meet the needs of the growing family market along with the higher-end RV and caravan niche market who regularly aim for a few nights out of their vehicles if the option of nice accommodation is available to them. There is also a regular business traveller market in Halls Gap travelling through the region.

The majority of accommodation categories for the visitor market in the region are currently limited to mostly more traditional-style 3-star motels, pub accommodation and small-scale B&Bs. Northern Grampians is missing a newer, higher-quality property to attract a higher-yielding market and complement the stunning natural environment and GPT amenities.

Though feasibility analysis is required, based on regional market demand and product gap assessments, a facility offering 40 to 60 units/rooms is potentially needed to meet forecast demand. Therefore, designing a facility that can include a potential two-stage development extension when demand is shown for this, could be a prudent option.

Several possible sites could be considered, and Council is keen to work with potential developers and investors to ensure an optimum location is found.

Ararat, Hamilton, Horsham, and Stawell branded CBD accommodation: The majority of accommodation typologies for the visitor market in Ararat, Hamilton, Horsham, and Stawell are restricted to motels, pub accommodations and some caravan parks. As outlined previously, the region has a lack of larger, higher-quality accommodation properties to cater for changing visitor market expectations.

For both these LGAs, a 3.5 - 4-star branded facility is suggested, of no less than 30 rooms for Stawell, 60 rooms for Hamilton and 80 rooms for Ararat and Horsham to meet the needs of the leisure market and the regular business traveller market.

A branded property is suggested for several reasons, including the following:

- They bring with them existing databases of customers who often only stay in their brand of property so achieve higher occupancy levels
- They have strong marketing budgets that are not only used to market the property but also their respective locations
- They offer a stronger well-maintained quality standard and are often required to reinvest regularly to ensure that the standard is maintained.
- These LGAs do not currently have a branded property and there are very few available throughout the broader region so this could have a far wider regional appeal as well for various markets.

Designation of sites for worker accommodation and packaging of these to investors: A major product gap identified for the Grampians is longer-term housing accommodation for a range of workers and residents. A mix of accommodation options is required to cater for single workers, couples and families and noting that there is a wide range of businesses who are needing accommodation.

There are very few properties in the region currently to rent and what is generally available is often old and somewhat unappealing. Businesses have expressed the challenge of finding and retaining staff due to the lack of suitable housing. The potential exists to investigate designating specific sites across the region for the development of worker accommodation and packaging these as "shovel ready" for investors to create a worker's accommodation village (possibly using prefabricated structures), where businesses can rent facilities long term.

It is noted that due to the significant pent-up demand for worker's accommodation, rents in the region have risen significantly, offering developers and investors attractive returns on investment

[27] STR August 2022

for longer-term rental periods, especially with guaranteed lease arrangements with local businesses.

Dunkeld luxury units: To bookend the GPT and in conjunction with the proposed Mount Zero Resort at the Northern gateway, the opportunity may exist for an off-park lodge at Dunkeld or surrounds to offer a Southern accommodation anchor for the trail. The lodge could comprise a 3-star eco-style property with 20 to 30 rooms. It could offer GPT walkers a place to stay post-walk and also allow shorter walks to be undertaken on the trail with walkers staying at the eco-style property, as not everyone will want to walk the entire 13-day trail but may wish to consider shorter options including half and full day walks in the region.

Great Western accommodation development (60 rooms): Great Western in the Northern Grampians Shire has a lack of commercial accommodation. As a result, visitors mostly travel to the town for day trips, often to visit the wineries and cellar door experiences. Economic leakage occurs because the bulk of visitor spending occurs outside of Great Western with overnight accommodation and meals elsewhere.

It is understood that a developer is keen to introduce a 60-room accommodation facility within the town and is currently seeking investor support. This should continue to be supported to maximise the economic uplift from tourism for Great Western.

Mount Zero Resort (Stage 2): Stage 1 of Mount Zero Resort has received an $8.5 million investment as part of the State Government's Regional Tourism Investment Fund. The $26.2 million project will feature 40 luxury accommodation villas, a restaurant, a café, a spa and wellness facility and plunge pools[28] and is set to open in 2024.

Stage 2 of the project includes a series of glamping pods, camping opportunities along with supporting facilities. Because of its connectivity to the northern end of the GPT, its ability to act as the northern anchor for the trail and the diversity of accommodation the project will offer, this should continue to be supported and advocated for to enhance the profile of the GPT and encourage stronger visitation and related spend in the region.

Table 11: Theme 5 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
○	4-star accommodation at Halls Gap ★	▪ Prepare feasibility and business case to identify opportunities and encourage operators and their investors. ▪ Prepare investment prospectus for sending to investors	$45.0m for development and $65k for feasibility and business case	NGSC	Medium – long term
◆	Advocate for/encourage motel retrofitting	▪ Host an annual workshop in each LGA with motel and accommodation operators to promote the benefits of accommodation retrofitting, demonstrating case studies of success and where this has led to improved ROI and demand	$45k	ARCC, HRCC, NGSC, SGSC, VV, RDV, GT	Short - medium term
○	Ararat CBD branded accommodation (80+ rooms) ★	▪ Prepare feasibility and business case to identify opportunities and encourage operators and their investors. ▪ Prepare investment prospectus for sending to investors.	$45.0m	ARCC	Medium - long term
○	Chalambar Golf Club accommodation and tourism feasibility study	▪ Engage a consultant to develop a feasibility study for the golf club to assist with identifying a vision and pathway forward for the facility.	$75k for study	ARCC, golf club	Medium term
◆	Designation of sites for worker accommodation and packaging of these to investors ★	▪ Work with Councils to identify potential sites that are suitable for marketing the development of worker accommodation. ▪ Develop a prospectus to take to worker accommodation investors.	$120k for site determination, planning study and investment prospectus	ARCC, HRCC, NGSC, SGSC, GT, RDV	Short - medium term

[28] https://www.premier.vic.gov.au/mount-zero-project-set-transform-grampians

Type	Recommendation	Action	Estimated Cost	Who	When
○	Destination holiday park	▪ Complete pre-feasibility assessing the viability of, and potential sites for, a destination holiday park. ▪ If shown to be viable, take pre-feasibility to potential major destination holiday park operators to gauge interest.	$18.0m	ARCC, HRCC, NGSC, SGSC, GT	Medium – long term
○	Dunkeld luxury units ★	▪ Prepare feasibility and business case to identify opportunities and encourage operators and their investors ▪ Prepare investment prospectus for sending to investors.	$7.0m for development, $65k for feasibility and business case	SGSC	Medium – long term
○	Great Western accommodation development (60 rooms) ★	▪ Support the existing developer/investor to achieve required planning approvals (where these meet Council requirements). ▪ Provide data for any planning and feasibility work required.	$20.0m	NGSC	Short - medium term
○	Glamping pods	▪ Undertake a pre-feasibility study looking at the development of glamping pods in the region.	$6.5m	ARCC, HRCC, NGSC, SGSC, GT	Medium – long term
○	Hamilton CBD branded accommodation (60+ rooms) ★	▪ Prepare feasibility and business case to identify opportunities and encourage operators and their investors. ▪ Prepare investment prospectus for sending to investors.	$35m for development, $65k for feasibility and business case	SGSC	Medium – long term
○	Heritage accommodation in St Arnaud	▪ Undertake a site assessment to determine potential sites suitable for heritage accommodation in St Arnaud. ▪ Develop a top-line feasibility study. ▪ If feasible, prepare an investment prospectus to identify opportunities and encourage operators and their investors.	$40k for top-line feasibility study and site assessment	NGSC	Medium – long term
○	Horsham CBD branded accommodation (80+ rooms) ★	▪ Prepare feasibility and business case to identify opportunities and encourage operators and their investors ▪ Prepare investment prospectus for sending to investors.	$45m for development, $65k for feasibility and business case	HRCC	Medium – long term
◆	Investigate challenges and ways to address short-stay housing impacts	▪ Investigate challenges and identify a feasible response/mechanism to address short-stay housing impacts on accommodation offering, workforce availability, infrastructure, destination marketing and investment, that leverages the greatest local benefit.	$35k	ARCC, HRCC, NGSC, SGSC, VV, RDV, GT	Short - medium term
○	Mount Zero Resort (Stage 2) ★	▪ Continue to support Stage 1 of development. ▪ Advocate for the funding and development of Stage 2 of Mount Zero Resort.	$10m	HRCC	Short - medium term

Type	Recommendation	Action	Estimated Cost	Who	When
○	Red Rock Olives high-end villa accommodation	▪ Support the existing developer/investor to achieve required planning approvals. ▪ Provide data for any planning and feasibility work required.	$15.3m for development and $25k for planning assistance	ARCC	Medium – long term
○	Red Rock Olives worker accommodation	▪ Support the existing developer/investor to achieve required planning approvals (where these meet Council requirements). ▪ Provide data for any planning and feasibility work required.	$750k for development and $25k for planning assistance	ARCC	Medium – long term
○	Silo accommodation at Mill Street Silos (feasibility study)	▪ Investigate the opportunity to convert Mill Street silos into a unique form of destination accommodation through a feasibility study. ▪ If feasible, prepare an investment prospectus to identify opportunities and encourage operators and their investors.	$65k for feasibility study and investment prospectus	HRCC	Medium – long term

○ **Development Projects** ◆ **Strategic Initiatives** ★ **Priority Project/initiative**

4.1.7. Theme 6: Identity, Marketing and Placemaking

There is a strong desire by stakeholders throughout the Grampians to raise awareness of the Grampians and the diversity of products on offer. Consumer research has found that the region has particularly low brand recognition in the Melbourne market, one of the key, higher-yielding source markets for the region.

To grow the reputation of the Grampians as an overnight holiday leisure destination, effort needs to continue to be directed towards building the identity of the Grampians. This should be focused on the core strengths and the emerging strengths of the region including nature, recreation, lakes and waterways, First Peoples, food and drink and art, culture, and heritage.

This theme focuses on building a strong brand identity as well as initiatives to improve the sense of place to ensure the Grampians, and its various towns, are recognised as a compelling holiday destination. Creating rich and active places across the seasons, a vibrant night-time economy and a sense of place will rewrite the Grampians' narrative.

This theme also identifies planning process initiatives required to ensure that place-making and tourism investment is as integrated and barrier-free as possible.

4.1.7.1. Priority Recommendations

The following are the priority recommendations under the Identity, Marketing and Placemaking Theme. They have been prioritised using the detailed project ranking matrix included in Appendix 4 and 5 and explained in Section 4.1.1.3.

Grampians (Gariwerd) National Park Public and Private Investment Strategy to support regional dispersal and Central Corridor Experience Masterplan: An investment strategy that involves the ability to attract both State Government funding and industry operator funding is warranted to support regional visitor dispersal and encourage filling of product gaps and services needed to encourage stronger sustainable visitation within the Grampians (Gariwerd) National Park. In turn, the investment strategy needs to link to a central corridor experience masterplan which identifies the critical nodes for activities and different forms of investment required into tourism-based amenities and facilities.

This approach would aim to not only determine what activities and facilities would be required and where they could be located and clustered, but also how they might be developed and invested in, by whom, and with what likely returns on investment, so a highly pragmatic approach is shown. Good comparative examples from other national park locations in Australia and overseas would need to be shown to illustrate workable models for public and private investment options, both in-park and also on its periphery where this is possible.

Greater marketing and profiling of the GPT at a state and national level: The investment into the GPT has been extensive and has resulted in a world-class walking trail in a pristine and nationally significant environment. The anecdotal feedback indicates that the numbers undertaking the GPT are far lower than forecast and that some parts of the GPT are less well-known and aren't seen as adequately profiled.

To generate greater visitation, a marketing strategy and promotional program dedicated to profiling the trail and supporting services and amenities (transport services to/from the GPT, cafes and restaurants to access nearby, accommodation options etc) needs to be developed with an appropriate marketing budget.

Greater tourism destination marketing campaign funding to encourage dispersal: The Grampians region comprises 4 LGAs, yet the majority of visitation is concentrated around Halls Gap as the recognised gateway to the GPT. There are, as identified, several different products to experience in the wider region including water and lake-based experiences, food trails and winery cellar doors etc. Greater marketing campaign funding is required to support a move to encourage greater visitor dispersal throughout the four LGAs and to encourage longer length of visitor stay and higher spending patterns in the region.

This is likely to require campaign contributions from industry operators, councils and council-owned entities, state government agencies and other groups.

Regional visitor servicing strategy: The approach to visitor servicing across the Grampians region is diverse and there is little synergy occurring. Because of the dramatically shifting landscape that is visitor services, it is recommended that a regional visitor servicing strategy is undertaken to develop a more cohesive and integrated approach. This could include the following.

- Assessing current VIC performance across the region (i.e., utilisation, penetration rates, financial performance, digital performance etc.).
- Shifting to potentially a stronger focus on the provision of online information through the region's destination websites.
- There is a need to ensure that updated and relevant information is provided across all visitor information channels, including to trade and tourism operators outside the region.
- Identifying mobile coverage "dead spots" to ensure that physical visitor information is provided in these locations.
- Improving wayfinding and signage to encourage greater visitor dispersal throughout the region.
- Investigating new and more flexible options to deliver visitor information services including mobile visitor information services, automated information containers/kiosks, high-

quality digital information platforms and co-locating visitor information services with other facilities such as art galleries, museums, and libraries.

- Coordinating any local destination websites to ensure that a consistent and accurate message is offered to those interested in visiting.
- Investigate initiatives that leverage the knowledge of the area held by semi-retired and retired community members and develop a "roving ambassador" program to assist visitors during peak season periods, events etc.
- Assessing alternative roles that VICs can fulfil such as being emergency coordination centres.

Review of LGA planning schemes: Each of the four LGAs within the region would benefit from a review of their planning schemes to introduce more user-friendly mechanisms to support tourism development requirements on rural and/or agricultural land. The cost and time to undertake planning scheme reviews will require state government funding assistance as no council within the region is adequately resourced to undertake such a review without funding assistance to cover the cost of engaging specialists to undertake this work.

For most councils, the majority of land is designated as rural, or zoned strictly for agricultural purposes. This effectively makes it extremely difficult for landowners to introduce core tourism and ancillary development such as worker accommodation, eco-cabins, glamping, walking and cycling trails across farmland and farm gate agritourism experiences.

Tourism Investment Marketing Campaign: GT, in conjunction with each of the councils within the region, created a Grampians Strategic Tourism Investment Plan in 2021-2022. Although a quality tourism investment prospectus was launched as a regional sell document for tourism development, a dedicated marketing campaign is required to help raise awareness of the opportunities to Victorian investors, those from other states and territories, and to also promote the opportunities via Trade Offices offshore.

The marketing campaign should also cover the options of holding investor forums in locations where investment companies are mostly based, such as Melbourne, Sydney, and Brisbane, as well as offering a program of encouraging visits by investors and their advisers to the Grampians to see opportunities on the ground.

Table 12: Theme 6 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
○	Activation of the Green Lake Recreational Precinct Vision Plan	▪ Identify grant streams and apply to these to fund the implementation of the Vision Plan	$300k	HRCC	Medium term
◆	Advocate for free ATDW listing state-wide	▪ Advocate to State Government on the need to continue offering the tourism sector with free listings on the ATDW	n/a	GT	Short term
◆	Advocate to streamline State Government planning process	▪ Continue to collectively advocate to State Government planning regarding the need to streamline the planning process and the blockages that are occurring	$40k	GT, ARCC, HRCC, NGSC, SGSC, RDV, DJSIR	Short term
○	Ararat Town Entrance enhancements	▪ Complete designs for Ararat town entrance enhancements ▪ Allocate funding in future budget(s) for enhancements	$300k	ARCC	Medium - long term
◆	Assessment of Horsham VIC location	▪ Complete an assessment of the location of the Horsham VIC to see whether relocation is optimal.	$25k	HRCC	Short-medium term
◆	Destination branding for LGAs in partnership with GT	▪ Commission the development of destination branding for the four LGAs to better align with the regional destination branding. This should be done in close collaboration with tourism operators to ensure buy-in.	$160k	GT, ARCC, HRCC, NGSC, SGSC	Short-medium term

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Events toolkit for each LGA	▪ Develop an events toolkit for each LGA to demonstrate that each is 'open' for events and to make event planning easier for event organisers.	$20k	GT, ARCC, HRCC, NGSC, SGSC	Short term-medium term
◆	Further profiling and development of the Haven Market	▪ Identify opportunities to further profile and enhance the Haven Market.	$25k	HRCC and operators	Short-medium term
◆	Grampians (Gariwerd) National Park Private Investment Strategy	▪ Develop a strategy via PV to identify and encourage different forms of private tourism investment to support the growth potential of GPT	$50k	PV, RDV, GT	Short term
◆	Grampians (Gariwerd) National Park Public and Private Investment Strategy to support regional dispersal and Central Corridor Experience Masterplan ★	▪ Develop a GPT central corridor experience masterplan that links private tourism products to public infrastructure so the GPT is integrated well into the visitor economy.	$150k	PV, GT, NGSC	Short – medium term
◆	Grampians enhanced and cohesive social media presence	▪ Undertake an audit of the Grampians' destination marketing presence on social media with a view to consolidating this to improve market cut-through and ROI.	$40k	GT, VV, ARCC, HRCC, NGSC, SGSC	Short term
◆	Greater marketing and profiling of the GPT at a state and national level ★	▪ Advocate for greater marketing and profiling of the GPT at a state and national level ▪ Aim to secure funding to profile the GPT via inflight publications, in major tourism-traveller publications online, via relevant websites etc	$150k	PV, GT, VV	Short-medium term
◆	Greater tourism destination marketing campaign funding to encourage dispersal ★	▪ Advocate for greater tourism Destination Marketing Campaign funding to encourage visitor dispersal ▪ Package up tours and products to illustrate regional dispersal options	$80k	GT, ARCC, HRCC, NGSC, SGSC, RDV	Short term
◆	Hamilton Botanic Gardens profiling	▪ Stronger profiling of the Hamilton Botanic Gardens through the introduction of garden tours, enhanced signage, and new events.	$35k	SGSC	Short term
◆	Map of regional trail running network	▪ Develop a digital map that profiles the region's trail-running network.	$15k	RDV, GT	Short-medium term
◆	Marketing to car clubs and associations (classic, vintage, veteran)	▪ Develop a direct marketing campaign targeted at car clubs and associations profiling the region's drive trails and appropriate packages.	$50k	GT, NGSC, VV	Short-medium term

Type	Recommendation	Action	Estimated Cost	Who	When
○	Napier Street retail facades	▪ Host a visioning workshop to gauge the will of current owners to participate in a restoration program and demonstrate the benefits of a restoration program. ▪ Identify grant funding streams to undertake a program of restoration for the facades on Napier Street. ▪ Commission a specialist to develop a program of restoration including a heritage architectural master plan.	$500k	NGSC, builder owners and private investors	Medium-long term
◆	One Tree Hill Master Plan	▪ Undertake the development of a master plan for One Tree Hill Master Plan in collaboration with local Traditional Owners, noting that while this is a Parks Victoria site, Parks Victoria supports the development of a master plan by Council.	$120k (to develop a master plan)	ARCC	Medium term
◆	Promotional campaign focusing on non-Grampians National Park assets	▪ Develop a marketing campaign that is specifically focused on non-GNP assets including rock lands, volcanic lakes and plains, and waterfalls. ▪ Deliver the campaign over two years.	$65k	PV, GT, ARCC, HRCC, NGSC, SGSC	medium term
◆	Regional visitor servicing strategy ★	▪ Undertake regional visitor servicing strategy to reassess visitor servicing needs and the various options for delivery.	$100k	ARCC, HRCC, NGSC, SGSC, GT	Short-medium term
○	Restaurant & function centre on the river edge	▪ Undertake a site analysis to identify an appropriate site for the restaurant & function centre ▪ Develop a prospectus to take to investors to promote the opportunity ▪ Offer site either on a long-term lease basis or as a freehold site.	$15k for site analysis and $8.0m (to develop by private investor)	HRCC	Short-medium term
◆	Review of LGA planning schemes ★	▪ Secure grant funding for reviews of LGA planning schemes to introduce tourism development on rural/agricultural land.	$100k	RDV, VPA, GT, ARCC, HRCC, NGSC, SGSC	Short – medium term
◆	Tourism awareness (value of the visitor economy) campaign for residents	▪ Raise community awareness of the value and importance of the visitor economy as a mechanism to support community social licence, economic outcomes, and environmental and cultural benefits.	$40k	ARCC, HRCC, NGSC, SGSC, GT	Medium term
◆	Tourism investment marketing campaign ★	▪ Secure additional funding for a dedicated promotional campaign.	$120k	GT, RDV	Short term
◆	Tourism planning zones study	▪ Undertake a study across the region to develop dedicated zones to support new tourism development.	$65k	GT, ARCC, HRCC, NGSC, SGSC, VPA, RDV	Short term

○ **Development Projects** ◆ **Strategic Initiatives** ★ **Priority Project/initiative**

4.1.8. Theme 7: Industry Development and Collaboration

The Grampians' operators are dispersed across a large region in many different towns and nodes. It is important that the industry is supported to meet visitor expectations and create a seamless visitor experience.

This theme focuses on fostering the development of the Grampians' industry via ongoing engagement, collaboration, and training to develop a strong, empowered and visitor-ready industry across the region.

Importantly, to deliver many of the recommendations under this theme, it will require further ongoing State Government funding assistance.

4.1.8.1. Priority Recommendations

The following are the priority recommendations under the Industry Development and Collaboration Theme. They have been prioritised using the detailed project ranking matrix included in Appendix 4 and 5 and explained in Section 4.1.1.3.

Industry development training (customer service, product/experience development, social media, marketing, grant application writing): Almost all operators in the tourism sector in the region are micro-to-small operators. Capability development should be a significant focus to work towards growing the leisure market and also the international visitor market. An area of focus is digital capabilities to ensure we can collectively lift the region's profile online and enable our visitor sector businesses – including hospitality and retail – to effectively market themselves and leverage tools and grant programs available.

The types of support required are likely to include (but not be limited to):

- programs focused on regenerative tourism practices, experience development and storytelling including our First Peoples' connection and stories, and across the key visitation drivers of Nature/GPT, Arts & Culture, Food & Drink, etc.;
- customer service upskilling and the development of both business capabilities and sustainable business practices;
- help in clustering and bundling experiences to make itineraries interesting and appealing;
- programs focused on social media and how to correctly utilise the various social media tools available (including what tool is best for specific types of marketing);
- grant writing support;
- help participating in additional programs to develop product offerings;
- providing the opportunity to network along the value chain to develop relationships with other suppliers.
- ATDW training to ensure the product is listed on the appropriate state and national tourism websites; and
- programs on understanding the difference between start-up, market-ready, accredited, and export-ready tourism products.

Development Approval Concierge for tourism businesses: Businesses and investors have identified the need for the development approvals (DA) process across the region to be more effective and efficient and thus streamlined. A regional business concierge could be employed that supports developers and businesses in the planning process. The concierge could work across the region on a part-time basis, but this would require buy-in from each council to achieve coordinated outcomes. It may also require support from State Government to help seed fund the concept as well.

Table 13: Theme 7 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	"Our Grampians" Ambassador program	▪ Develop and roll-out an "Our Grampians" local ambassadors to promote local products and destinations.	$65k	ARCC, HRCC, NGSC, SGSC, GT	Short – medium term
◆	Australian Tourism Accreditation Program (ATAP) awareness and participation	▪ Increase GT businesses' awareness of the Australian Tourism Accreditation Program (ATAP) by profiling the program, its benefits and case studies.	$20k	GT	Short term
◆	Careers expo for tourism and hospitality	▪ Introduce an annual careers expo focused on the tourism and hospitality sector working with Grampians' businesses and local schools and training institutions.	$55k	GT, RDV, DJSIR, ARCC, HRCC, NGSC, SGSC	Medium term

Type	Recommendation	Action	Estimated Cost	Who	When
○	Careers marketing event program	▪ Develop a careers marketing event program aimed at year 7-8 students, their parents, and careers advisors to promote and encourage career paths in the sector.	$55k	GT, RDV, DJSIR, ARCC, HRCC, NGSC, SGSC	Short-medium term
◆	Connecting VCAL students with tourism businesses	▪ Connect tourism businesses in the Grampians with Year 11 and 12 students undertaking VCAL studies and promote opportunities for work experience.	$15k	GT, RDV, DJSIR, ARCC, HRCC, NGSC, SGSC	Short-medium term
◆	Development Approval Concierge for tourism businesses ★	▪ Identify potential grant funding streams that could be applied to fund the Concierge position. ▪ Work with each Council to develop a role description for the position. ▪ Go to the market to advertise for the position.	$127k (over three years) for p/t staff member	GT, ARCC, HRCC, NGSC, SGSC, RDV	Short term
◆	Digital recruitment training for Grampians operators	▪ Host a series of workshops with Grampians operators focused on digital recruitment training techniques.	$45k	ARCC, HRCC, NGSC, SGSC, GT	Short-medium term
◆	Distribution of SpendMap data	▪ Distribute SpendMap data to businesses on a bi-annual basis to show businesses consumer spending trends throughout each LGA (for those LGAs that subscribe).	$12k	ARCC, HRCC, NGSC, SGSC, GT	Short-medium term
◆	Expanding in-region tourism training opportunities for locals	▪ Work with local providers to expand in-region training opportunities including building a business case for more in-region training to grow local skills to support a broader range of roles and support out-of-the-box employment. ▪ Undertake an annual skills needs survey in collaboration with registered training organisations (RTOs) to build a business case for more in-region training and gain an understanding of the current skills needs.	$20k	ARCC, HRCC, NGSC, SGSC, GT, RDV, DJSIR	Short-medium term
◆	Explore the potential for labour exchanges across the region	▪ Review the results of the skills needs survey. ▪ Explore the need for and practicality of a labour exchange program in consultation with RTOs, DJSIR, RDV ▪ Work with operators who expressed an interest to support the take-up of the program.	$35k	ARCC, HRCC, NGSC, SGSC, GT, RDV, DJSIR, VV	Medium term
◆	F&B and tourism operator ATDW & digital awareness readiness	▪ Host a series of workshops in each major town in collaboration with VV and/or ATDW to promote the importance of the ATDW and its benefits. ▪ Host an annual ATDW sign-up day in each town to demonstrate to operators how to self-list.	$20k	GT, ARCC, HRCC, NGSC, SGSC	medium term

Type	Recommendation	Action	Estimated Cost	Who	When
◆	F&B roster development	▪ Work with F&B operators in each major town to get buy-in from those interested in signing up for an F&B roster system. ▪ Work with operators to develop the roster. ▪ Profile those operators who are involved in the roster system.	$20k	ARCC, HRCC, NGSC, SGSC, GT	Short – medium term
◆	Food & Wine Appreciation training program	▪ Provide targeted training and support for F&B operators to upskill.	$40k	DJSIR, GT, ARCC, HRCC, NGSC, SGSC	Short - medium term
◆	Grampians "Employer of Choice" program	▪ Develop a Grampians "Employer of Choice" program. ▪ Profile these employers to help boost recognition.	$25k	ARCC, HRCC, NGSC, SGSC, GT	Short – medium term
◆	Industry forums focused on workforce issues	▪ Deliver a series of industry forums to gain an understanding of the current skill needs and gaps.	$35k	GT, RDV, DJSIR, ARCC, HRCC, NGSC, SGSC	Short-medium term
◆	Industry development training (customer service, product/experience development, social media, marketing, grant application writing) ★	▪ Work with DJSIR to develop a region-wide industry training program for tourism industry operators. ▪ Leverage the $34m State and Federal investment in the Grampians Peaks Trail by implementing a targeted LTO training program for operators keen to commence operations on the trail or existing operators wanting to upskill further.	$100k	GT, DJSIR	Medium term
◆	Innovative and flexible employment opportunities	▪ Continue to raise awareness of the availability of support programmes for 'out-of-the-box' employment including the Pacific Australia Labour Mobility (PALM) scheme through the distribution of regular email updates. ▪ Review the range of information-sharing channels (including meetings, newsletters, and other tools, e.g., the LinkedIn Network) for employers to find the best ways of getting information to the industry and for the industry to share information, issues, and opportunities. This includes the promotion of success stories of local staff and tourism careers.	$25k	ARCC, HRCC, NGSC, SGSC, GT, RDV, DJSIR	Short - medium term
◆	Local employment opportunities	▪ Focus on local employment (where possible) including previously unemployed local staff (mature workers, mothers returning to work part-time, youth, First Peoples, and people with disabilities).	$20k	DJSIR, GT, ARCC, HRCC, NGSC, SGSC	Medium term

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Small Business Bus by Business Victoria profiling	▪ Profile the Small Business Bus by Business Victoria and encourage industry operators to utilise the service.	$10k	DJSIR, GT, ARCC, HRCC, NGSC, SGSC	Medium term
◆	Southern Grampians local tourism group	▪ Re-establish the Southern Grampians local tourism group.	$20k	GT, SGSC, industry	Short-medium term
◆	Victorian Training Guarantee (VTG) program awareness and participation	▪ Increase GT businesses' awareness of and participation in the Victorian Training Guarantee (VTG) program.	$35k	DJSIR, GT, ARCC, HRCC, NGSC, SGSC	Short-medium term
◆	Workforce planning promotional campaign	▪ Develop and promote campaigns to sell the benefits of investing in workforce planning (profile, identify and use case studies on local businesses as a medium for promotion)	$35k	GT, RDV, DJSIR, ARCC, HRCC, NGSC, SGSC	Short – medium term

○ **Development Projects** ◆ **Strategic Initiatives** ★ **Priority Project/initiative**

4.1.9. Theme 8: Supporting Infrastructure

The Grampians has a growing visitor economy, and its proximity to Melbourne and major regional generating markets will ensure that it continues to be the preferred destination for day trip and overnight visitor markets. There is a need, however, to continue to invest in infrastructure, transport and supporting infrastructure to support this growth.

The theme focuses on developing strong foundations for visitor economy growth through advocating for investment into infrastructure, transport connections, and visitor services that support a successful Grampians region.

4.1.9.1. Priority Recommendations

The following are the priority recommendations under the Supporting Infrastructure Theme. They have been prioritised using the detailed project ranking matrix included in Appendix 4 and 5 and explained in Section 4.1.1.3.

Advocate for peak season public transport options around the Grampians: Public transport around the Grampians region and to major attractions within Grampians (Gariwerd) National Park is noted by almost all stakeholders as a challenge for the region going forward. There is a need to advocate for the following.

- A shuttle bus service to operate from Halls Gap to major sites within Grampians (Gariwerd) National Park such as MacKenzie Falls, the Wonderland Loop Walk, Silverband Road and Reed Lookout. This could run on a circuit basis and operate as a pay-for-use service during peak periods to minimise congestion and manage safety concerns.
- Transport solutions for workers to travel throughout the region from home to their place of work. It is noted that many workers in Halls Gap reside in Stawell (and beyond) and often the ability of businesses to attract staff into Halls Gap and other areas, particularly for shift work, is hampered by the lack of viable transport options.
- More public transport options for visitors and locals to travel into the Grampians region. Currently, to travel from Melbourne into the Grampians, visitors largely rely on private vehicles. A trip from Melbourne to Halls Gap in a private vehicle takes approximately 3 hours. For visitors and locals to use public transport, this travel time increases drastically with some options likely taking 14 hours involving several modes of transport. While vehicle transport will likely continue as the most popular transport mode for the Grampians, there is a need to continue to advocate for improved public transport links to the Grampians and within the major towns to not only benefit the visitor market but also the local market.

Pedestrian priority for Halls Gap (once Heath Street bridge is developed): There is a desire by some stakeholders to see Halls Gap as being a car-less town where pedestrians are prioritised. There are many examples of these towns around the globe, however, this would be one of the first examples of an entirely car-less town in Australia. This would not only enhance the visual appeal of Halls Gap but would reduce pollution and enhance visitor safety.

Many global studies have found that the pedestrianisation of towns results in people staying longer and spending more money in towns which could result in significant economic benefits for Halls Gap.[29]

Horsham Aerodrome redevelopment: Horsham Rural City Council is keen to further activate the Horsham Aerodrome to support several longer-term uses including air access for visitor markets to the region and various aviation-based business enterprises.

It is currently undertaking the first stage of a master plan that is investigating the introduction of tourism-based recreational aviation experiences. This includes, but is not limited to, the following:

- Eventual scheduled regular passenger services and scenic flights for the wider region
- Gliding and training
- Paragliding
- Parachuting
- Light aircraft training school
- Microlights
- As a hub for agri-sector spraying and support

This should continue to be progressed to a full master plan once the initial business case and feasibility are completed in 2023 and assuming a positive financial and economic outcome are shown. Though the commercial viability of a regular passenger service may be a longer-term achieved outcome, establishing the base for this in the short-medium term is an important building block to pursue to support the wider region for aviation services for business, leisure, and VFR travel.

[29] Car-free cities: are Australians ready to take back the streets? (https://www.themandarin.com.au/104759-car-free-cities-are-australians-ready-to-takeback-the-streets/

Table 14: Theme 8 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Advocate for upgraded Horsham passenger rail	▪ Continue to advocate for the upgrade of Horsham's passenger rail to introduce a passenger service back into Horsham	$100k	HRCC	Short term
◆	Advocate for peak season public transport options around the Grampians ★	▪ Develop a peak season public transport options plan to take to the government as an advocacy piece. ▪ As a region, continue to advocate for improved peak season public transport options around the Grampians.	$150k	ARCC, HRCC, NGSC, SGSC, RDV, GT	Short term
○	Alexandra Gardens boardwalk	▪ Develop the boardwalk at Alexandra Gardens to provide improved access.	$200k	ARCC	Medium term
○	Pedestrian priority for Halls Gap (once Heath Street bridge is developed) ★	▪ Advocate for Halls Gap to go "car-less" once Heath Street bridge is developed. ▪ Develop advocacy material that supports this including case studies of where this has worked well elsewhere.	$60k for advocacy material and campaign	NGSC	Medium term
○	Cycle trail link from Pomonal to Halls Gap	▪ Develop a cycle trail link from Pomonal to Halls Gap. ▪ Identify any grant funding sources to fund the trail.	$185k	ARCC, NGSC	Medium – long term
○	Dunkeld rubbish management	▪ Make improvements to Dunkeld's rubbish pickup schedule to address community concerns around peak-period rubbish issues.	$15k	SGSC	Short term
◆	Electric charging stations around the Grampians	▪ Identify investment required to support electric charging stations around the Grampians working in collaboration with Councils to ensure duplication of effort does not occur.	$1.2m	ARCC, HRCC, NGSC, SGSC, GT, RDV	Short-medium term
◆	Halls Gap worker transport	▪ Explore options for the development of a minibus service to support workers in Halls Gap	$100k	NGSC	Short-medium term
◆	Finalisation of Dunkeld visitor hub project	▪ Continue to progress with the completion of the Dunkeld visitor hub project	$1.5m	SGSC	Medium term
○	Green Hill Lake walking track development	▪ Support the development of the 7km walking track at Green Hill Lake ▪ Identify any grant funding sources to fund the track.	$3.5m	ARCC, Green Hill Lake Development Board	Medium – long term
◆	Halls Gap southern gateway	▪ Investigate options to develop the previously proposed southern gateway at Halls Gap to provide an enhanced sense of arrival when entering Halls Gap.	$125k for gateway study and design work	NGSC	Medium – long term

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Hamilton as a hub for caravans/RVs (RV parking, promotional campaigns etc.)	▪ Identify investment required to support positioning Hamilton as a hub for RV touring and visitation, including signage and dump points. ▪ Develop media collateral to promote Hamilton as a hub for caravans/RVs and ensure this is distributed to GT and VV	$60k	SGSC	Short-medium term
○	Heath Street upgrades & bridge	▪ Continue to advocate for Heath Street upgrades and redevelopment	$25.0m	NGSC	Medium – long term
○	Horsham Aerodrome redevelopment ★	▪ Continue to progress the development of the Aerodrome via the master plan that is currently being developed for the site.	$11.0m	HRCC	Medium – long term
○	Horsham Equestrian Centre	▪ Commission a business case to assess the potential of the equestrian centre. ▪ If feasible, explore potential grant funding streams to support the centre's development.	$7.5m for development and $45k for business case and feasibility	HRCC	Medium – long term
◆	Rowing course expansion	▪ Investigate extending the rowing course to 1,000m for rowing events. ▪ If feasible, identify funding streams or grants to support the expansion.	$1.0m estimate for expansion and $25k for investigation	Hamilton Rowing Club, SGSC	Medium – long term
○	Lake Bellfield improvement	▪ Investigate options to enhance the public's access to Lake Bellfield via soundless boat access (rowing or kayaking), providing a jetty and other recreational services.	$5.0m est. for improvements and $45k for assessment study	NGSC	Medium – long term
○	MacKenzie Falls master plan	▪ Commission the development of a master plan for MacKenzie Falls looking at car parking, signage, visitor flows etc. as well as dispersal once visitors leave MacKenzie Falls.	$7.8m for est. development and $120k for masterplan	PV, Council and GT	Short-medium term
◆	Mobile and digital connectivity improvements advocacy	▪ Identify the investment required to support mobile and digital connectivity improvements. ▪ Publish this as an advocacy document to take State Government	$1.0m est. for improvements and $25k for advocacy document	ARCC, HRCC, NGSC, SGSC, GT, RDV	Short-medium term
○	Ongoing activation of City to River Masterplan	▪ Continue to activate the Masterplan. ▪ Continue to identify potential grant funding streams to support the Masterplan's rollout.	$200k	HRCC	medium term

Type	Recommendation	Action	Estimated Cost	Who	When
○	Outdoor multi-purpose sports precinct	▪ Commission a business case to assess the potential of the outdoor multi-purpose sports precinct and optimal site locations. ▪ If feasible, explore potential grant funding streams to support the precinct's development.	$15.0m est. for precinct development, $45k for business case	HRCC	Medium – long term
○	Public (paid) shuttle to key Grampians sites during peak periods	▪ Identify potential operators who may have an interest in operating a public (paid) shuttle to key Grampians sites during peak periods (MacKenzie Falls, Wonderland Car Park, Silverband Falls, Reed Lookout). ▪ Undertake discussions with State Government regarding potential funding streams that could assist in subsidising the service.	$250k for peak period operator support for shuttle service	GT, ARCC, HRCC, NGSC, SGSC	Short-medium term
○	Public toilet facilities at Dunkeld Arboretum	▪ Look to develop public toilet facilities at Dunkeld Arboretum. ▪ Identify funding programs/streams to fund this investment.	$145k	SGSC	Short-medium term
○	Regional indoor sports precinct	▪ Commission a business case to assess the potential of a regional indoor sports precinct and optimal site locations. ▪ If feasible, explore potential grant funding streams to support the precinct's development.	$15.0m est. for indoor precinct and $45k for business case	HRCC	Medium – long term
◆	Road improvements to VicRoads	▪ Continue to advocate for road improvements to VicRoads.	$35k for advocacy	VicRoads, RDV, GT, ARCC, HRCC, NGSC, SGSC	Short term (ongoing)
○	RV parking spots along Barkly St in Ararat CBD	▪ Identify the optimal position to locate RV parking spots along Barkly St ▪ Introduce 6+ RV parking spots.	$120k for the study and development of parking spots	ARCC	Short – medium term
○	Sawyer Park Soundshell upgrade	▪ Identify funding programs/streams to fund this investment. ▪ Complete upgrades to Sawyer Park Soundshell as per City to River Vision and Masterplan	$1.5m	HRCC	Medium term
◆	Signage audit & upgrades (directional & interpretive)	▪ Commission a regional tourism signage audit that focuses on both direction and interpretive signage and provides recommendations for improvements.	$100k	GT, ARCC, HRCC, NGSC, SGSC	Medium term

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Staff shuttle (Halls Gap to Pomonal and Ararat)	▪ Undertake an assessment (including liaison with staff and employers in Halls Gap and Pomonal) to understand demand potential. ▪ If demand exists, explore either a paid option or explore grant funding streams that could support the operation of the service.	$85k	NGSC, ARCC, GT	Medium term
○	Upgrade an existing Bowls Club to enable the hosting of regional events	▪ Undertake an audit of bowls clubs in the LGA to determine the optimal facility to upgrade (as per Horsham Sporting Facilities Demand Assessment). ▪ Identify potential grant funding streams to support the upgrade.	$750k	HRCC	Medium - long term
○	Upgrade an existing tennis facility to enable the hosting of regional events	▪ Undertake an audit of tennis facilities in the LGA to determine the optimal facility to upgrade (as per Horsham Sporting Facilities Demand Assessment). ▪ Identify potential grant funding streams to support the upgrade.	$1.0m	HRCC	Medium - long term
○	Upgrade City Oval as Horsham's premier regional AFL/cricket venue	▪ Undertake an audit of AFL/cricket venue facilities in the LGA to determine the optimal facility to upgrade (as per Horsham Sporting Facilities Demand Assessment). ▪ Identify potential grant funding streams to support the upgrade.	$2.5m	HRCC	Medium - long term

○ **Development Projects** ◆ **Strategic Initiatives** ★ **Priority Project/initiative**


Image credit: Grampians (Gariwerd) National Park, Visit Victoria

4.2. Delivering the Priority Projects

This DMP has a strong focus on identifying private-sector investment opportunities for the Grampians' visitor economy. Too often the capital cost burden primarily falls heavily on the government to fund with too little private sector investment able to be leveraged.

Table 15 provides a summary of the priority Development Projects and their estimated capital costs. These estimates are indicative only and are provided to help illustrate the likely level of capital development required for the projects identified.

It illustrates that to activate interest in many of the privately funded suggested projects, publicly funded infrastructure is needed, as, without a commitment from both public and private sector funding sources, too little product development may be able to be activated from this DMP. As shown, there is a strong private-sector investment focus, with 88% of funding estimated to come from private funding sources and the remaining 12% coming from public sources.

Table 16 provides a summary of the priority Strategic Initiatives and estimated capital costs. For these projects, there is a far stronger public-funding requirement as they cannot generate a commercial return, however, they are important to support visitor economy growth.

Table 15: The Priority Development Projects and Associated Estimated CAPEX

Opportunity Name	LGA	Strategic Investment Theme	Weighted Score	PPP - Public	PPP - Private	Public - Only	Private - Only	Total CAPEX
Dunkeld geothermal bathing experience	Southern Grampians	Wellness	127				$7.5m	**$7.5m**
4-star accommodation at Halls Gap	Northern Grampians	Regional Accommodation	125	$4.5m	$40.5m			**$45.0m**
Indoor activity centre	Ararat	Nature and Recreation	123				$4.5m	**$4.5m**
Horsham CBD branded accommodation (80+ rooms)	Horsham	Regional Accommodation	120				$45.0m	**$45.0m**
Ararat CBD branded accommodation (80+ rooms)	Ararat	Regional Accommodation	120				$45.0m	**$45.0m**
Horsham Aerodrome redevelopment	Horsham	Supporting Infrastructure	119	$9.0m	$2.0m			**$11.0m**
Great Western accommodation development (60 rooms)	Northern Grampians	Regional Accommodation	119				$20.0m	**$20.0m**
Brambuk upgrade	Northern Grampians	First Peoples	116			$7.0m		**$7.0m**
Hamilton CBD branded accommodation (60+ rooms)	Southern Grampians	Regional Accommodation	115				$45.0m	**$45.0m**
Hamilton Gallery revitalisation	Southern Grampians	Arts and Culture	111			$4.0m		**$4.0m**
Mount Zero Resort (Stage 2)	Horsham	Regional Accommodation	109		$10.0m			**$10.0m**
The Bath House Pomonal	Ararat	Wellness	108				$4.0m	**$4.0m**
Stawell CBD branded accommodation (30+ rooms)	Northern Grampians	Regional Accommodation	108				$17.0m	**$17.0m**
Pedestrian priority for Halls Gap (once Heath Street bridge is developed)	Northern Grampians	Supporting Infrastructure	106			$1.0m		**$1.0m**
Grampians Wine Discovery Centre (showcase and attraction)	Northern Grampians	Food and Drink	106	$9.0m	$9.0m			**$18.0m**
Chocolatarium (chocolate factory)	Ararat	Food and Drink	106				$5.5m	**$5.5m**
Expansion of Grampians Food and Drink Packages	Regional	Food and Drink	105	$5.0k	$45k			**$50k**
Dunkeld luxury units	Southern Grampians	Regional Accommodation	105				$7.0m	**$7.0m**
Ararat distillery	Ararat	Food and Drink	105				$7.5m	**$7.5m**
Expansion of J Ward Ghost Tours	Ararat	Arts and Culture	103	$10k	$90k			**$100k**
				$22.5m	**$61.6m**	**$12.0m**	**$208m**	**$304m**
				7%	**20%**	**4%**	**68%**	**100%**

Table 16: The Priority Strategic Initiatives and Associated Estimated CAPEX

Name	LGA	Strategic Investment Theme	PPP - Public	PPP - Private	Public - Only	Private - Only	Total Est. CAPEX
Advocate for peak season public transport options around the Grampians	Regional	Supporting Infrastructure			$150k		**$150k**
Designation of sites for worker accommodation and packaging of these to investors	Regional	Regional Accommodation	$293k	$158k			**$450k**
Grampians (Gariwerd) National Park Public and Private Investment Strategy to support regional dispersal and Central Corridor Experience Masterplan	Regional	Identity, Marketing and Placemaking			$150k		**$150k**
Greater marketing and profiling of the GPT at a state and national level	Regional	Identity, Marketing and Placemaking			$150k		**$150k**
Greater tourism destination marketing campaign funding to encourage dispersal	Regional	Identity, Marketing and Placemaking			$80k		**$80k**
Industry development training (customer service, product/experience development, social media, marketing, grant application writing)	Regional	Industry Development and Collaboration			$100k		**$100k**
Industry training with First Peoples and Elders including a cultural induction for Licensed Tour Operators	Regional	First Peoples			$45k		**$45k**
Regional visitor servicing strategy	Regional	Identity, Marketing and Placemaking			$100k		**$100k**
Review of LGA planning schemes	Regional	Identity, Marketing and Placemaking			$100k		**$100k**
Tourism Investment Marketing Campaign	Regional	Identity, Marketing and Placemaking			$120k		**$120k**
			$293k	**$158k**	**$995k**	**-**	**$1.4m**
			22%	**12%**	**74%**	**-**	**100%**

4.3. Governance Framework

4.3.1. The VEP Model

Visitor Economy Partnerships (VEPs) have been recently announced by the State Government as the new independent destination management entities for Victoria, replacing the existing regional tourism organisation model. The VEPs are the peak official voices for the visitor economy in their region and are invited to collaborate with the Victorian Government, councils, and industry to set the vision and manage the growth of their region's visitor economy, ensuring alignment with the State's Experience Victoria 2023. The VEP's role is to deliver on their vision through supply and demand activities to support the growth of the visitor economy. The VEP's core responsibilities are as follows:

- Deliver enhanced leadership and collaboration at a regional level.
- Tailor industry strengthening support to address regional needs.
- Encourage increased community support for tourism.
- Facilitate enhanced visitor dispersal and experiences.
- Undertake collaborative destination marketing and regional conversion.
- Provide insights and investor connections that inform a strengthened pipeline and product development.
- Provide regional context and insights to inform government policy development, decision making and investment priorities.
- Ensure continued crisis preparedness and support relative to the visitor economy.

VEPs are required to report regularly on performance, using the support offered and templates supplied by DJSIR – Tourism & Events.

A VEP has been proposed which would integrate the LGAs currently within the Grampians region and the Wimmera Mallee Tourism group of councils, being Ararat and Horsham Rural City Councils and Northern Grampians, Southern Grampians, Buloke, Hindmarsh, West Wimmera, and Yarriambiack Shire Councils. It has been proposed by State Government that Grampians Tourism become the VEP for this wider area.

Importantly, however, Wimmera Mallee is a very different product offering to the Grampians and, as such, would likely require a different brand proposition.

4.3.2. Reporting requirements

A central tenant of VEPs is the development and implementation of the region's DMP (this Grampians DMP document). These plans reflect a shared vision and strategy for the growth of the region's visitor economy.

GT as the VEP for the region will be required to develop an annual implementation plan that outlines the priority projects for the year, roles and responsibilities of all stakeholders, timing, resourcing requirements, and targets.

Annual implementation plans are to be provided for approval under the funding agreement with the Victorian Government and it is against these plans that VEPs will be required to report.

There is also a requirement every six months to provide State Government with a progress report outlining achievement against the year's milestones and targets, including those specified in the annual DMP implementation plan.

Grampians VEP is required to provide State Government with:

- A report that outlines achievement against the previous year's milestones and targets, including those specified in the annual DMP implementation plan.
- Updated annual DMP implementation plan for the upcoming 12 months, including milestones and targets.
- Audited annual financial accounts of the organisation.
- Corporate Governance Reporting.

4.3.3. Governance Vision

Finally, and most importantly, the governance vision developed by the Grampians region aligns with the VEP requirements as recently established by State Government (DJSIR – Tourism & Events) and also aligns with the overall Grampians DMP vision, set out earlier along with key objectives and relevant themes.

The governance vision for the Grampians DMP reflects the need for new and refreshed products and associated tourism sector investment, facilitated via a Grampians VEP Governance Group comprising senior council representation, senior State Government investment and development representation, and representation from the investment sector.

4.3.4. Funding Model

The new VEP structure provides financial support to organisations such as Grampians Tourism that are partnering with three or more Councils at $350K pa. VEP's that are partnering with 6 of more Councils will be eligible for $590K pa (an increase of $240K pa).

GT is supportive of the VEP collaboration and has been working extensively across borders with the Wimmera Mallee Tourism group of councils and it is clear that a successful VEP model would require the management of an independent Visit Wimmera Mallee brand. Grampians Tourism will continue to work collaboratively with the Victorian Government and the Wimmera Mallee Councils to identify opportunities to work together to support the growth of the visitor economy in the broader region and ensure the ongoing financial sustainability of GT.

4.3.5. What does success look like for GT?

GT will be driven by the use of reliable data to inform decisions and measure success in the following areas:

- Excellence in our marketing and digital strategy that drives an increase in brand awareness and assists partners to grow visitor yield.
- Growth in traffic and conversions on the website and engagement growth on social media platforms.
- Increased partnership numbers, contributions, and collaborative engagement to support destination development.
- Increased visitor yield, dispersal, and length of stay.
- Consistent engagement with Grampians LGAs.
- Positive partnerships – delivering value to our partners.

4.3.5.1. Short-Term Tasks and Deliverables

In the short term, GT will:

- Deliver business outcomes based on quality research, best practices and return on investment.
- Celebrate what's working well and promote the region's 'heroes'.
- Leverage Grampians Peaks Trail domestically and internationally to position Grampians as the premier nature-based destination.
- Focus on amplifying regional brand and priority intrastate and interstate audiences.
- Invest further in our local hosts to promote the region.
- Further enhance our visitor experiences through Industry Development activity.
- Continue to foster strong relationships with industry and facilitate opportunities.
- Reduce fragmentation of marketing spend to support a targeted and focused approach.
- Encourage uniform and consistent use of regional brands to reduce fragmentation across stakeholders (though recognising if the VEP is established, a separate brand would likely need to be created to represent the Wimmera Mallee councils).
- Operate with a sustainable business model.

4.3.5.2. Medium-Term Tasks and Deliverables

In the medium term, GT will:

- Focus on industry engagement and investment attraction.
- Advocate for a skilled tourism workforce.
- Support our First Peoples to develop the cultural tourism offering.
- Support further investment in quality public infrastructure that disperses visitors across the region.
- Partner with LGAs to attract new residents and workers.
- Strengthen our tourism offering by working jointly on the supply side and investment attraction.
- Advocate for further funding opportunities from DJSIR.

4.3.6. Summary

In summary, the timing of this DMP for the Grampians should be seen as highly advantageous. It sets down a clear and detailed implementation action plan and specifies the priority projects for the Grampians region and for each of the four council areas (via individual LAAPs). This should enable reporting requirements under the new VEP structure to be achieved and performance to be easily measured and tracked.

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Image credit: Halls Gap Zoo, Visit Victoria

Part 5: Appendices

Appendix 1 Full Survey Questions

grampians tourism

Grampians Destination Management Plan & Local Area Action Plans

Have your say

The Grampians region requires a new Destination Management Plan (DMP) to provide a shared vision and direction for the sustainable development of our visitor economy. One which supports the attraction of investment across the region and ensures the Grampians remains a leading nature-based tourism destination and is both compelling for visitors and sustainable for local communities.

Essentially, it's about having a path for tourism to truly support our industry and the quality of life of our community and environment.

In addition to the new DMP, four Local Area Action Plans (LAAPs) will be developed for the Council areas within our region: Ararat Rural City Council, Horsham Rural City Council, Northern Grampians Shire Council and Southern Grampians Shire Council. The LAAPs will align with the DMP but will be specific to each LGA and set out the vision and aspirations for each visitor economy over the next five years.

Stafford Strategy has been commissioned to develop the DMP and the four LAAPs.

This survey provides you with the opportunity to have your say. Your responses will be kept confidential and are only being sent to Stafford Strategy.

This survey will close at 11.59 pm, 5th April 2023.

1. What is your business/organisation name? (please leave blank if you wish to provide an anonymous response)

* 2. Is your business currently a member of any local or industry networks or associations?

- No
- Unsure
- Yes (please specify)

* 3. What Council area within the Grampians region do you primarily associate with?

- [ ] Ararat Rural City Council
- [ ] Horsham Rural City Council
- [ ] Northern Grampians Shire Council
- [ ] Southern Grampians Shire Council
- [ ] Other (please specify)

* 4. What best describes your business/organisation?

(If you fall into more than one category, please select the most relevant category that pertains to you).

- ○ Food and beverage
- ○ Tourism accommodation
- ○ Tourism attraction
- ○ Retail
- ○ Transport
- ○ Professional services (accounting, marketing, media etc.)
- ○ Events
- ○ Council personnel
- ○ Parks Victoria personnel
- ○ Interested community member
- ○ Other (please specify)

* 5. How do you currently promote your business / organisation? Select all that apply.

- [ ] Grampians Tourism Partnership
- [ ] ATDW Listing
- [ ] Google Maps Listing
- [ ] Social media (e.g. Facebook, Instagram)
- [ ] Online business directory
- [ ] Community newsletter
- [ ] Digital Marketing (e.g. SEM, online advertising etc)
- [ ] Local newspapers / magazines
- [ ] Media outside of the region
- [ ] Local radio / TV
- [ ] Mail and email-outs
- [ ] Media famils
- [ ] Not applicable (no marketing or promotion)
- [ ] Other (please specify)

* 6. What are the key issues (if any) your business / organisation is currently facing that we should be aware of? Select all that apply.

- [ ] Obtaining finances
- [ ] Attracting and / or retaining skilled employees
- [ ] Attracting and / or retaining volunteers
- [ ] Lack of marketing skills and training
- [ ] Lack of business planning or financial management
- [ ] Local economic conditions
- [ ] Government regulations (e.g. planning, permits, licenses, etc.)
- [ ] Labour costs
- [ ] Lack of demand
- [ ] Other (please specify)
- [ ] COVID-related impacts
- [ ] Nature-related impacts (i.e. bushfires/droughts)
- [ ] Lack of marketing / promotion support
- [ ] Personal circumstances
- [ ] Lack of market demand
- [ ] Lack of space for growth / expansion
- [ ] Lack of worker housing
- [ ] Low awareness of region
- [ ] Not applicable (no issues)

* 7. What are the key opportunities that Grampians Tourism could provide or facilitate that would support the development of your business / organisation? Select all that apply.

- [ ] Further industry training
- [ ] Marketing / promotion support
- [ ] Business / industry networking and engagement opportunities
- [ ] Investment support / information
- [ ] Planning / compliance support
- [ ] Other (please specify)

* 8. What are the key outcomes you would like to see from the Destination Management Plan for the Grampians? Select all that apply.

- [ ] Increase in annual visitation
- [ ] Visitor dispersal throughout the region
- [ ] Town centre improvements (e.g. street beautification)
- [ ] Promoting / marketing the region to visitors
- [ ] Business / industry support
- [ ] Improve community and business networking / engagement
- [ ] Support the development of more local events
- [ ] Develop arts and cultural assets
- [ ] Other (please specify)
- [ ] Improved events facilities
- [ ] Development of new attractions / experiences
- [ ] Support / promotion of smaller towns within the region
- [ ] Improve visitor amenities / services (e.g. picnic areas, toilet blocks, etc.)
- [ ] Improve wayfinding / signage for visitors
- [ ] Enhanced use of nature-based assets with infrastructure and promotion
- [ ] Encourage sustainable tourism

* 9. To make the Grampians a more appealing visitor economy, where do you believe investment should be targeted to? Please rank the following in terms of highest to lowest priority.

- Roads / transport infrastructure / accessibility
- Conference centres / community facilities
- Destination marketing / promotion
- Professional development / training
- Development / support of local events
- Town centre improvements
- Business / industry networking opportunities
- Signage and wayfinding
- Development of new attractions / experiences

10. What do you feel are the best hidden gems in the Grampians that have the potential to be developed as key tourism assets?

11. What do you feel is the best way to support dispersal around the Grampians region?

12. What are your ideas for new/improved products and experiences in the Grampians? This will support the identification of priority projects for the Destination Management Plan, so please be as specific as possible (i.e. potential locations for new offerings / locations that require investment etc).

Food/dining

Beverage (wine, beer, distilling etc)

Accommodation

Nature-based (e.g. infrastructure, tours, experiences etc)

Cycling (e.g. specific cycle loops, locations for mountain biking etc)

Arts and culture (e.g. museums, galleries, interactive experiences, First Nations experiences etc)

Other (please specify)

13. What is the key infrastructure needs you believe are required to support the visitor economy in the Grampians? This will support the identification of priority infrastructure projects for the Destination Management Plan, so please be as specific as possible (i.e. locations for the required new / upgraded infrastructure).

Roads

Public transport

Aviation

Digital infrastructure (i.e. telecoms)

Services infrastructure (e.g. water, sewer)

Visitor servicing (i.e. visitor information, signage etc)

Other (please specify)

* 14. What core values/guiding principles do you think should guide sustainable tourism development in the Grampians? Please rank the following in terms of highest to lowest priority.

- Environmental principles - preservation, restoration and appreciation, addressing climate change
- Economic development - jobs, economic diversification
- Greater collaboration – between public services, community groups and business enterprises
- Social development – growth is guided by principles that support and improve social well-being of the community
- Cultural principles - respect, sustainability, partnership, collaboration

15. Do you have any other comments or suggestions to make?

Appendix 2 Survey Results

A survey was distributed over two months to the community and industry throughout the Grampians region. The survey received 200 responses in total.

Overall, the sample size for the total survey was robust, achieving a 95% confidence level and a 7% margin of error.

The following provides the findings of the survey responses across the region.

200 responses

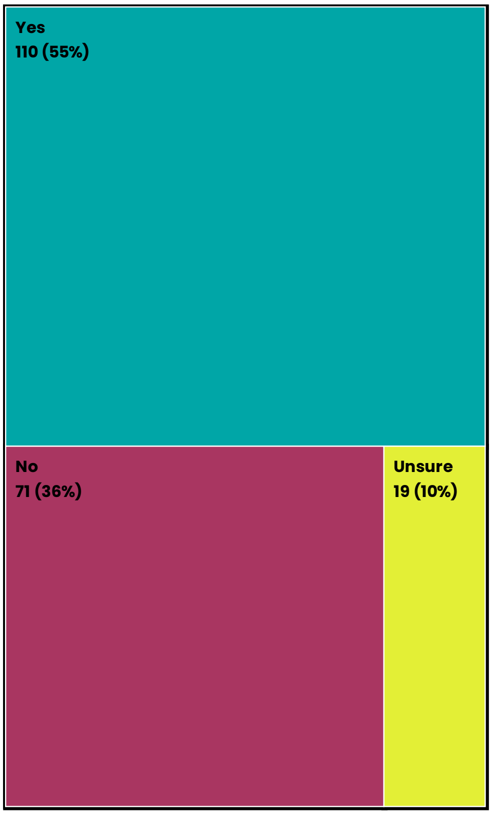
Response Rate

Question 1

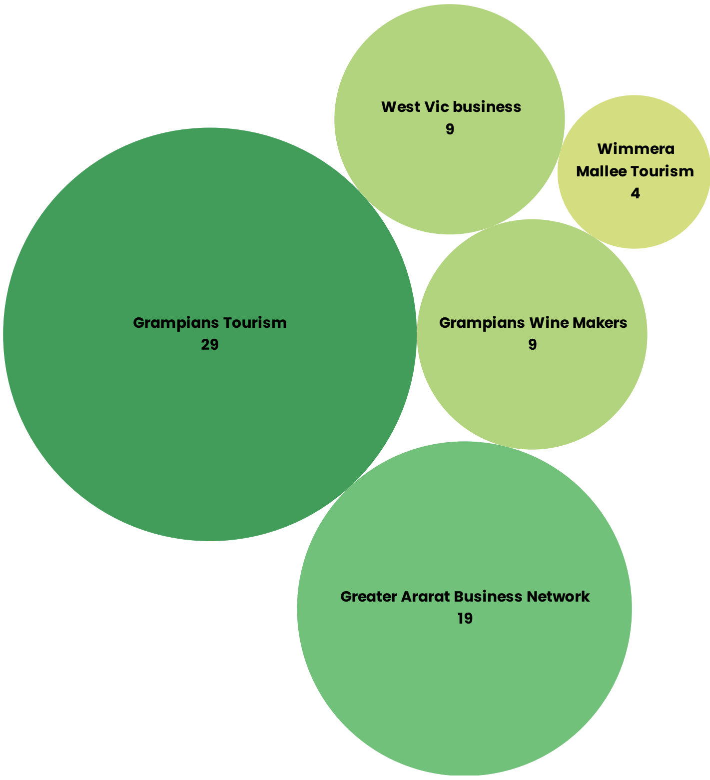
Name – Confidential

Question 2

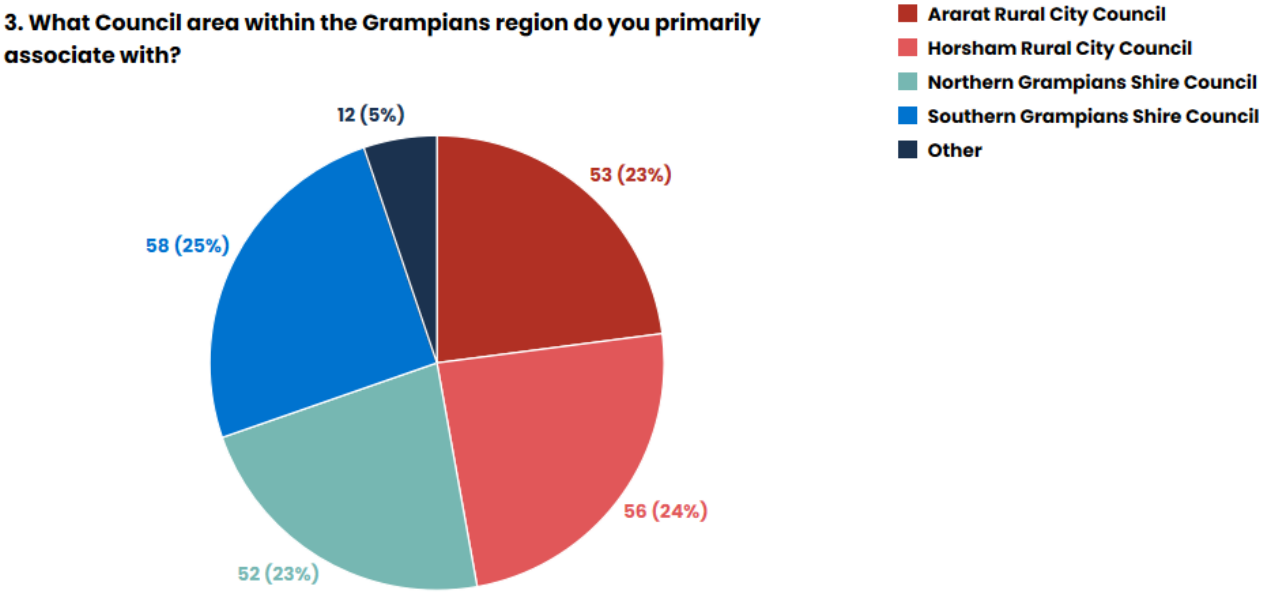
2. Is your business currently a member of any local or industry networks or associations?



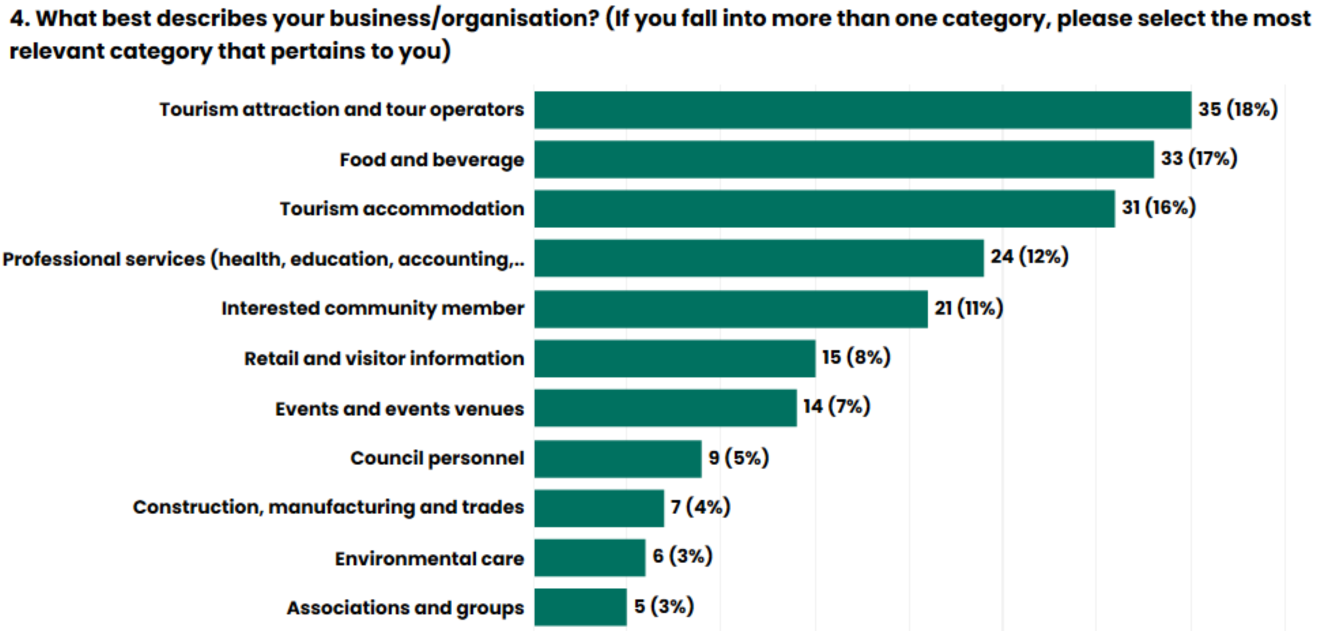
Top Networks respondants belong to



Question 3

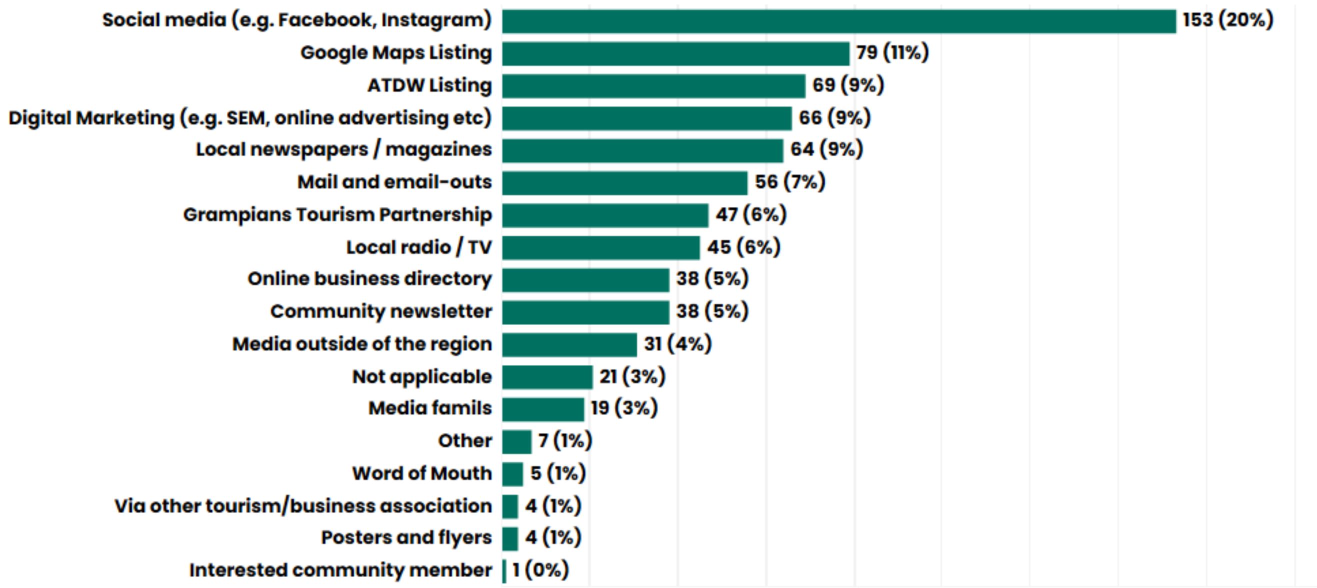


Question 4



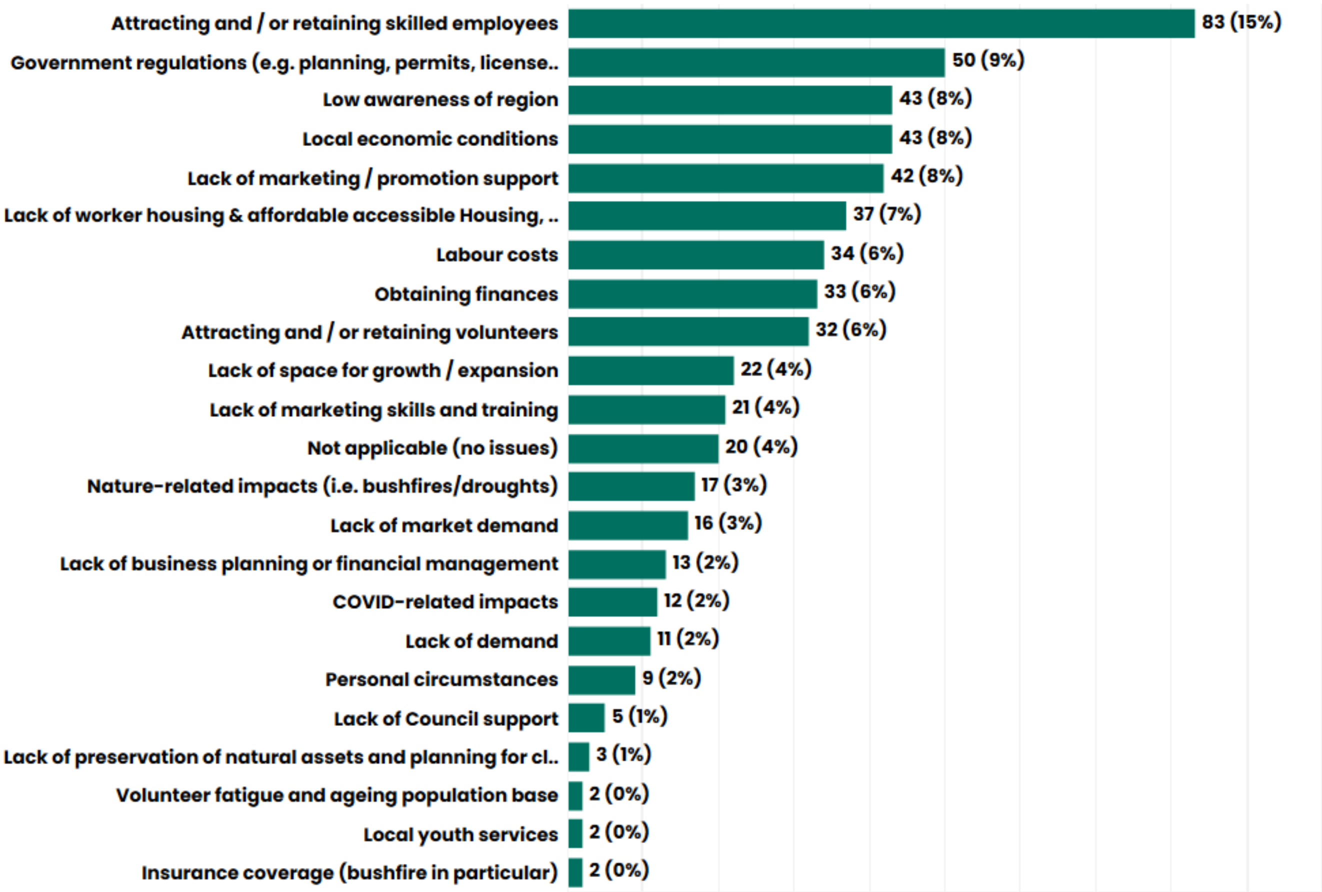
Question 5

5. How do you currently promote your business / organisation? Select all that apply.

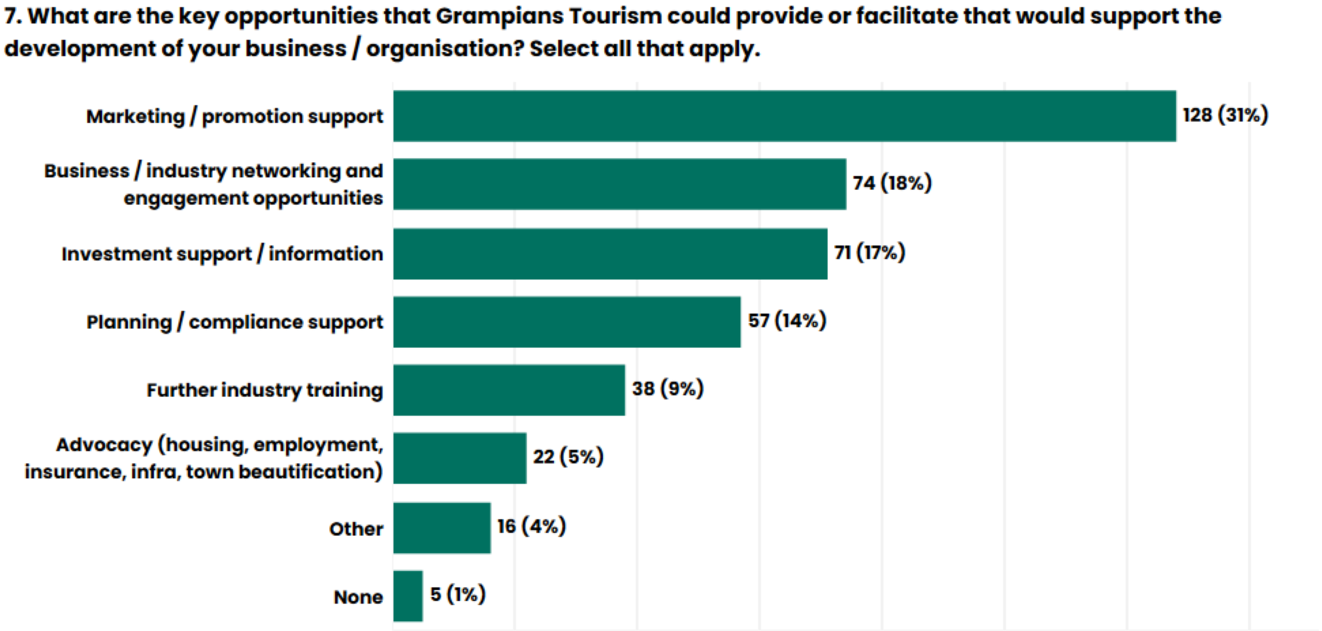


Question 6

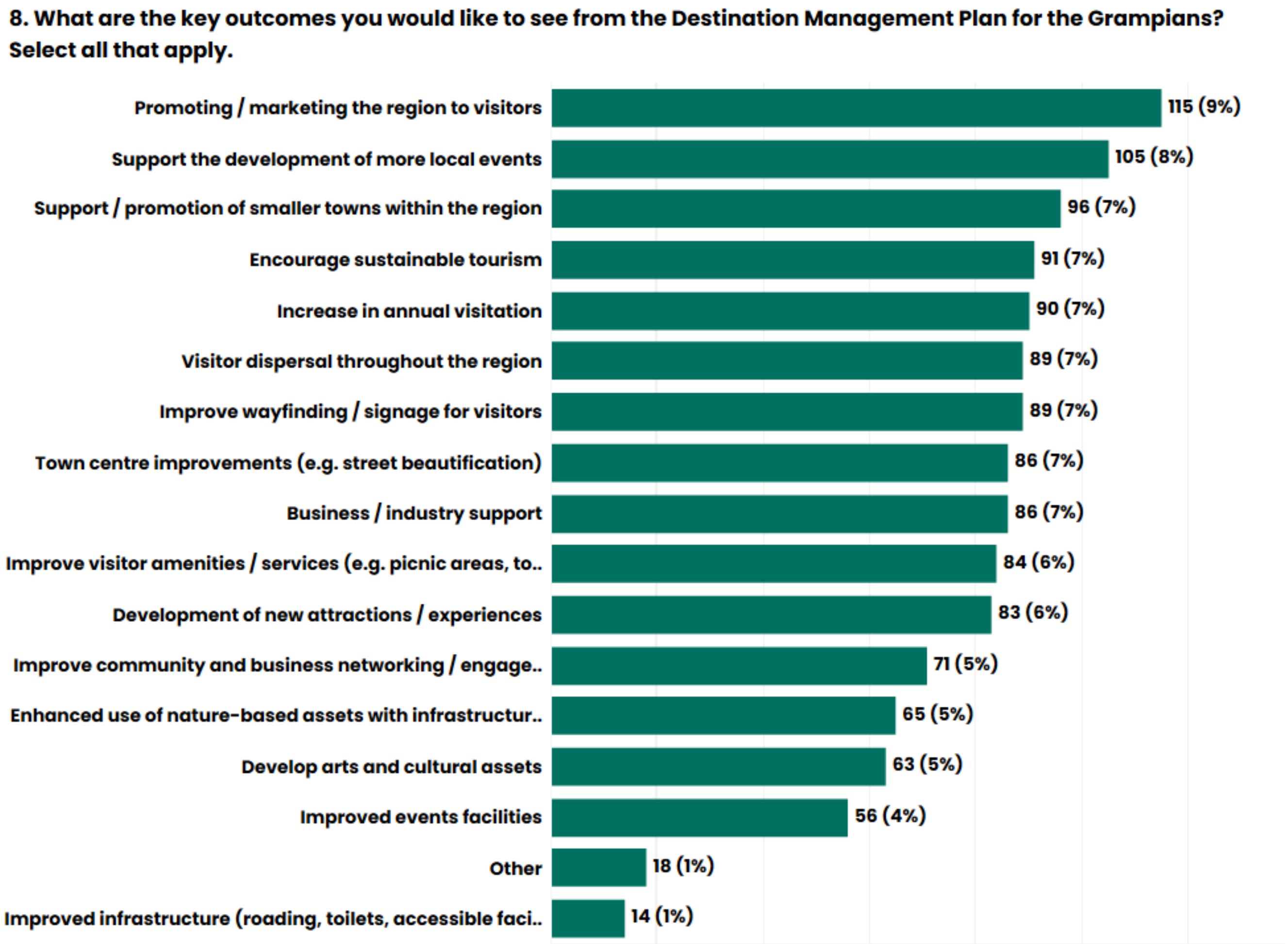
6. What are the key issues (if any) your business / organisation is currently facing that we should be aware of? Select all that apply.



Question 7

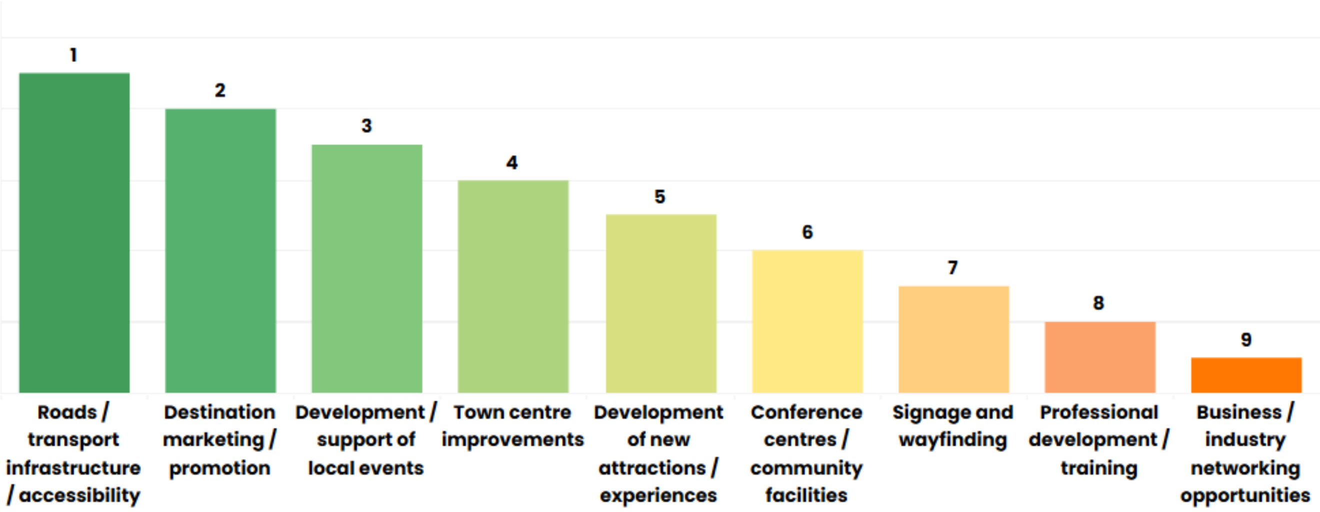


Question 8



Question 9

9. To make the Grampians a more appealing visitor economy, where do you believe investment should be targeted to? Please rank the following in terms of highest to lowest priority.



Question 10

What do you feel are the best hidden gems in the Grampians that have the potential to be developed as key tourism assets?

Question 11

What do you feel is the best way to support dispersal around the Grampians region?

Question 12

What are your ideas for new/improved products and experiences in the Grampians? This will support the identification of priority projects for the Destination Management Plan, so please be as specific as possible (i.e., potential locations for new offerings / locations that require investment etc).

Feedback for the **Northern Grampians Shire** included the following:

- GPT needs way more supported walking options and better consumer information
- Need for more shuttle services into the national park and wider distribution of visitors
- Attract new dining options
- Eateries which open every day and into the evening
- Food vans during peak times
- Improved outdoor dining areas
- Overhaul Great Western food offering
- Expanded paddock-to-plate options to profile locally-grown produce
- Pomonal to Halls Gap bike path
- Stawell to Halls Gap Rail Trail
- Rail trails need to cater to walkers and cyclists
- Grampians Gin Distillery
- Roads need improving to make them safer for cyclists
- Marketing of arts and culture
- Promote the WAMA experience
- Improve Brambuk building and experience
- Place a cap on AirBnBs to help address the lack of rental housing for locals
- Sustainable accommodation and housing for workers
- Higher-end quality accommodation with the capacity to cater to groups
- Increase the range of accommodation with greater variety and pricing options
- More sporting events
- Education programs for businesses to be visitor friendly

Feedback for the **Southern Grampians Shire** included the following:

- Hamilton to Coleraine Rail Trail
- Develop Hamilton to Cavendish rail trail as a bike path
- A gourmet deli and sushi bar required
- Cafes need to stay open beyond 3 pm weekdays
- Need for improved food offerings in the region
- Supermarket needed for Dunkeld
- More attractive cafes with sophisticated dining options
- Better food quality and choice of dining styles
- Night-time casual dining options for Dunkeld
- Improved cellar door offerings
- New major contemporary agri-food production and science gallery to link to the international seed bank
- Far greater focus on FIrst Peoples' art and culture with FIrst Peoples' nature-based tours
- Tapas bar in the old garage in Dunkeld
- Better quality mix of housing
- Expand accommodation options and types
- Conference facility for Hamilton with greater capacity and linked to a new accommodation facility
- Attract major exhibitions to Art Gallery
- Bowling alley with play area for younger children
- Doggy daycare

Feedback for the **Ararat Rural City Council** included the following:

- Need for a low-cost partnership for small business operators to be able to join GT
- Introduce a day spa resort
- Encourage free wifi everywhere
- Provide hikers with picnic boxes for day treks
- Encourage more locals to lead walking tours to local nature tourism sites
- Encourage First Peoples' tour operators with a focus on native botanicals
- Introduce fishing tours
- Establish better infrastructure for school camps at Lake Bolac
- Invest in the one tree hill lookout
- Attract a fine dining establishment
- Extend opening hours of dining establishments during holidays and events
- Degustation menus with local wineries
- Food and coffee vans for Green Hills Lake
- Ararat and Stawell to open on Sundays
- Bike trail Ararat to Pomonal
- Build a walking/cycling trail around Lake Bolac
- Better online and hard-copy maps of cycling and walking routes
- Boutique distillery
- Shiraz Discovery Centre
- Cultural attractions are lacking
- Museums need to be consistently open during the week
- More authentic First Peoples-led cultural experiences
- Accommodation for staffing
- Pomonal as a hub for housing
- Cabins in vineyards from affordable to luxury
- Larger scale accommodation for conference groups
- Upgrading of existing accommodation facilities

Feedback for the **Horsham Rural City Council** included the following:

- Detailed mapping of all tourism experiences in the region as micro ventures have difficulty in obtaining signage
- Mini golf at Horsham Golf Club
- Better signage for riverwalks
- Sunset and sunrise tours for Mount Arapiles
- Wider Wimmera/Mallee tours through a small minivan-bus service around the region
- New visitor attraction reflecting "the Spirit of Gariwerd" as a nature tour-based experience in the national park
- A dedicated function centre in the CBD with a focus on local produce
- Allowing Al Fresco dining by the waterways
- More evening dining options for Horsham, Dimboola, and Warracknabeal
- More food festivals and events covering smoked foods or slow-cooked foods festivals, barista competitions etc
- Promotion of quality local produce reflecting seasonal food changes
- Cycling trails needed around Mount Zero/Laharum region with new accommodation
- Top of the hill ride on Mount Arapiles
- Beer or cocktail festival with live music
- Micro-Brewery and distillery
- Guided tours on trails
- First Peoples' tool and didgeridoo-making courses
- Interactive museum attraction for Horsham and turn the flour mill into a museum
- Expand the variety of accommodation
- Complete golf course accommodation
- Introduce more low-cost camping site options
- RV-friendly towns needed
- Eco camping and farm stays required

Question 13

What is the key infrastructure needs you believe are required to support the visitor economy in the Grampians? This will support the identification of priority infrastructure projects for the Destination Management Plan, so please be as specific as possible (i.e., locations for the required new / upgraded infrastructure).

Feedback for the **Horsham Rural City Council** included the following:

- Upgrade Horsham Airport
- Online gateway portal for all tourism businesses to have a greater coordinated online presence
- Greater investment in mobile towers
- Improved emergency connectivity for phone and wifi
- Improvements to town entryways and better levels of landscaping
- Extend Mount Zero to Horsham bus service to a loop covering the northern end of the Grampians
- Passenger train services from Melbourne to Horsham
- More regular bus services between Ararat, Halls Gap, Stawell, Horsham, Nihil, and Dimboola
- Need more appealing public toilets and better maintenance
- Water fountains around town and better maintenance of public spaces

Feedback for the **Ararat Rural City Council** included the following:

- Encourage more aviation activity in the region
- Better wifi connectivity and cell services outside of town centres
- More Telstra mobile towers especially in Pomonal
- Improve the quality of tourism signage throughout the region
- Improve town entry throughout the region with better landscaping and beautification
- Regional public transport services required for locals and visitors
- More EV charging stations
- Need for an 8.30 pm Vline service from Ararat to Melbourne on Saturday and Sunday

- Expand car parking facilities and signage upgrade
- Address sewage treatment in towns such as Pomonal
- Better connectivity between the regions visitor centres to onsell regional product

Feedback for the **Northern Grampians Shire Council** included the following:

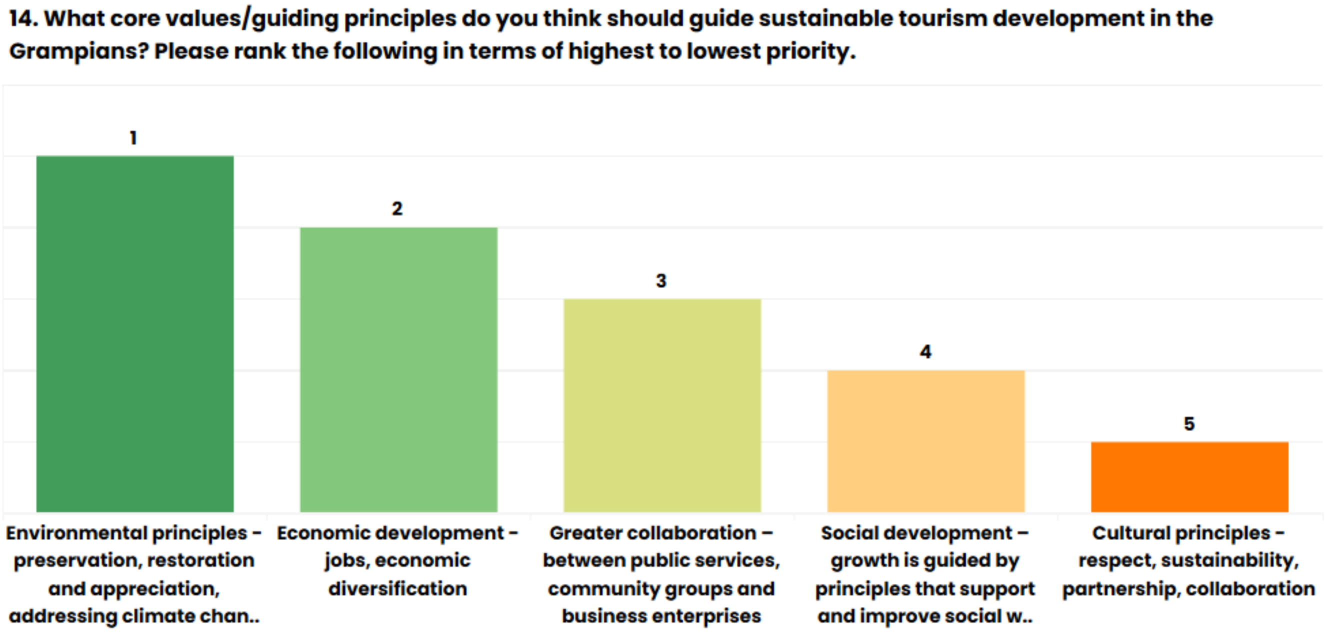
- Encourage aviation links into the region, especially for business travel
- Maintain a no-fly over zone for National Park and no drones
- More consistent wifi and phone connections especially at Halls Gap
- A bus service that connects with the overland train
- Peak season bus service linking Halls Gap to Wonderland carpark, Sundial, Silverband Falls, Lake Bellfield wall, park visitor centre and back to Halls Gap
- The road from Ararat to Halls Gap is too narrow and poorly maintained
- Need for dedicated cycle and walking trails
- Need for EV charging stations
- Need for expanded car parking facilities in most towns
- Address sewage in Great Western
- Offer alternative power options including renewable energy
- More training needed for visitor services staff ongoing

Feedback for the **Southern Grampians Shire Council** included the following:

- Encourage Hamilton to Melbourne air link
- Encourage regional connections via air to link rural towns to Melbourne
- Improve internet connectivity
- NBN services are very poor
- Tourism signage needs upgrading
- Buses able to transport bikes
- Bus services to connect to train services at Ararat and Warrnambool
- A broader range of public transport options needed
- All roads need upgrading and more regular maintenance
- Need for renewable energy options and far greater use of solar
- Sewage issues in Cavendish and Dunkeld hold back progress and tourism development
- The structure plan needs to be more flexible and responsive to changing needs to allow for growth
- Great staff at the Hamilton Visitor Centre and need to maintain the level of quality
- More information on pet-friendly accommodation facilities
- Improve all visitor information centres signage throughout the region

Question 14

What core values/guiding principles do you think should guide sustainable tourism development in the Grampians? Please rank the following in terms of highest to lowest priority.



Question 15

Do you have any other comments or suggestions to make?

Appendix 3 Net Promoter Score

To undertake a top-line assessment of the quality of a region's product offering, the Net Promoter Score (NPS) metric can be used. This is a measurement of consumer loyalty. In a tourism context, this translates to a visitors' willingness to not only return for another stay but also make a recommendation to their family, friends, and colleagues. NPS scores are reported with a number from -100 to +100, with a score above 30 considered good and a score above 50 considered excellent.

The NPS is calculated using a scale (see Figure 17), with:

- a score between 0-6 is considered unhappy customers who are unlikely to return, and may even discourage others from staying with the provider;
- a score between 7-8 being passives, meaning they are satisfied with the provider but not happy enough to be considered promoters; and
- a score between 9-10 is considered promoters who are typically loyal and enthusiastic customers and who are likely to return and strongly promote the provider.

TripAdvisor and Google[30] use a scale of 1-5 for consumer ratings on accommodation products. Converting this to the NPS scale means that a rating of 1-3 is considered "detractors" for the product, a score of 4 are the product's "passives" and a score of 5 is the product's "promoters".[31] Only product with more than 5 reviews was included in the NPS assessment to ensure a robust sample size.

Figure 17: NPS Score Scale

[30] Booking.com has not been used to derive a NPS because it does not provide a scale of scores, but rather, only provides an overall score. Therefore, an NPS is unable to be calculated from Booking.com listings.
[31] https://birdeye.com/blog/net-promoter-score-explained/

Appendix 4 Full Matrix with Values

Table 17: Full matrix with values – Development Projects

Opportunity Name	Ability to encourage stronger international visitation	Ability to encourage stronger interstate visitation	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding for Project	Alignment with Experience Victoria	Catalyst project to stimulate other investment	Dispersal of Visitors	Employment (Operational) Potential	Estimated Visitation	Landowner	Level of Public Investment Required (as a % of total investment)	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for the	Requirement for ongoing operational Govt. funding	Short term to Activate	Uniqueness of Product
4-star accommodation at Halls Gap	Strong	Strong	Strong	Limited	High	Strong	None	21-50 FTE	Medium	Private	Very Low or None	High	None	None	No	Locally Unique
Activation of the Green Lake Recreational Precinct Vision plan	None	Limited	Limited	Limited	Low	None	Limited	0	Low	Other Govt.	High	Very Low or None	None	Limited	No	Locally Unique
Activation of the Wimmera River in Horsham	None	Limited	Limited	Limited	Medium	Limited	Limited	Less than 5 FTE	Medium	Private	High	Very Low or None	None	None	Yes	None
Agridome showcase attraction	Medium	Medium	Medium	Medium	Low	Limited	Limited	5-10 FTE	High	Private	High	Medium	Medium	Medium	No	State-wide Unique
Alexandra Gardens Boardwalk	Limited	Limited	Limited	Limited	Medium	None	None	0	Medium	Unknown	High	Very Low or None	None	Limited	No	Locally Unique
Ararat CBD branded accommodation (80+ rooms)	Medium	Medium	Strong	None	High	Medium	None	More than 50 FTE	High	Private	Very Low or None	High	None	None	No	Locally Unique
Ararat Dirt Mountain Bike 12 Hr Race	Limited	Limited	Limited	Medium	Low	None	Limited	Less than 5 FTE	Low	Other Govt.	High	Very Low or None	None	High	Yes	Locally Unique
Ararat distillery	Limited	Limited	Medium	Limited	High	Limited	Limited	5-10 FTE	Medium	Private	Very Low or None	High	Low	None	Yes	Locally Unique
Ararat Hill Climb event expansion	Medium	Medium	Limited	Limited	None	Limited	Medium	5-10 FTE	Medium	Other Govt.	High	Medium	None	Limited	Yes	None
Ararat skate park event	Limited	Limited	Limited	Limited	Low	Limited	None	n/a	Low	Council	High	Very Low or None	None	Limited	Yes	Locally Unique
Ararat Sky Park	Medium	Medium	Medium	Limited	Low	Limited	Limited	5-10 FTE	High	Parks Victoria	Very Low or None	High	None	None	No	Regionally Unique
Ararat Town Entrance enhancements	None	None	None	Limited	None	None	None	0	n/a	Council	High	Very Low or None	None	Limited	No	Locally Unique
Ararat Trails mountain bike park	Limited	Limited	Limited	Medium	Medium	Limited	Medium	Less than 5 FTE	High	Other Govt.	High	Very Low or None	None	Limited	No	Locally Unique
Art, laneways, and culture tours of Horsham	Limited	Limited	Medium	Limited	Low	Limited	None	n/a	Low	Mixed	High	Very Low or None	None	Limited	Yes	Locally Unique
Brambuk upgrade	Strong	Medium	Limited	Strong	High	Medium	Strong	5-10 FTE	High	Parks Victoria	High	Very Low or None	High	Medium	Yes	State-wide Unique

Opportunity Name	Ability to encourage stronger international visitation	Ability to encourage stronger interstate visitation	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding for Project	Alignment with Experience Victoria	Catalyst project to stimulate other investment	Dispersal of Visitors	Employment (Operational) Potential	Estimated Visitation	Landowner	Level of Public Investment Required (as a % of total investment)	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for the	Requirement for ongoing operational Govt. funding	Short term to Activate	Uniqueness of Product
Careers marketing event program	n/a	n/a	n/a	Medium	High	n/a	n/a	n/a	n/a	n/a	High	Very Low or None	None	Medium	Yes	n/a
Chalambar Golf Club accommodation and tourism feasibility study	Limited	Limited	Medium	Limited	Medium	Limited	Limited	n/a	Low	Private	Very Low or None	High	None	None	No	n/a
Chocolatarium (chocolate factory)	Medium	Medium	Medium	None	High	None	None	5-10 FTE	Medium	Private	Very Low or None	High	Medium	None	No	Regionally Unique
Dark Matter Discovery Centre	Medium	Medium	Medium	Limited	Low	Medium	None	5-10 FTE	Medium	Private	High	Very Low or None	High	Limited	No	Nationally Unique
Destination holiday park	Limited	Medium	Medium	None	Low	Limited	Limited	5-10 FTE	Medium	Private	Very Low or None	High	None	None	No	Locally Unique
Dunkeld geothermal bathing experience	Strong	Strong	Strong	Limited	Medium	Medium	Limited	5-10 FTE	Low	Private	Very Low or None	High	High	None	No	Locally Unique
Dunkeld luxury units	Strong	Medium	Strong	Limited	Medium	Medium	Limited	5-10 FTE	Low	Private	Very Low or None	High	None	None	No	Locally Unique
Dunkeld nature playground	None	None	Limited	Medium	Low	n/a	Limited	n/a	High	Council	High	Very Low or None	None	Limited	No	Locally Unique
Dunkeld rubbish management	n/a	n/a	n/a	Limited	None	n/a	n/a	n/a	n/a	Mixed	High	Very Low or None	None	Medium	Yes	n/a
Elevation of the Nati Frinj Biennale (greater profiling)	Limited	Medium	Limited	Limited	Low	None	Medium	Less than 5 FTE	Low	n/a	High	Very Low or None	None	Medium	Yes	Regionally Unique
Equine trails with tours	Limited	Limited	Limited	None	Low	None	Medium	5-10 FTE	Low	Other Govt.	Very Low or None	High	None	None	No	Locally Unique
Expansion of gliding and fixed aviation events	Medium	Medium	Medium	Limited	Low	Limited	Limited	n/a	Medium	Council	High	Medium	None	Medium	Yes	Locally Unique
Expansion of J Ward Ghost Tours	Limited	Limited	Limited	Medium	Low	Limited	Limited	5-10 FTE	Medium	Other Govt.	Very Low or	High	Medium	Limited	Yes	State-wide Unique
First Peoples' cultural tourism product development	Strong	Limited	Medium	Medium	High	Limited	Limited	5-10 FTE	Medium	TOs	High	Medium	None	Medium	No	State-wide Unique
Glamping pods	Medium	Medium	Medium	None	Medium	Limited	Limited	5-10 FTE	Low	Private	Very Low or None	High	None	None	No	Locally Unique
Grampians food & drink packages	Medium	Medium	Medium	Limited	High	Limited	Medium	Less than 5 FTE	Low	Private	Very Low or None	High	Low	Limited	Yes	Locally Unique

Opportunity Name	Ability to encourage stronger international visitation	Ability to encourage stronger interstate visitation	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding for Project	Alignment with Experience Victoria	Catalyst project to stimulate other investment	Dispersal of Visitors	Employment (Operational) Potential	Estimated Visitation	Landowner	Level of Public Investment Required (as a % of total investment)	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for the	Requirement for ongoing operational Govt. funding	Short term to Activate	Uniqueness of Product
Grampians Rail Trail completion (connection from Stawell to Halls Gap)	Medium	Medium	Limited	Limited	Low	Limited	Medium	n/a	Low	Mixed	High	Very Low or None	None	Medium	No	Locally Unique
Grampians Tourism Region Road Cycling Granfondo Event	Medium	Medium	Limited	Medium	Low	None	Medium	Less than 5 FTE	Low	Other Govt.	High	Very Low or None	None	High	Yes	Regionally Unique
Grampians wine cellars profiling	None	None	Limited	None	High	Limited	Limited	Less than 5 FTE	Medium	Private	Very Low or None	High	None	None	No	Locally Unique
Grampians Wine Discovery Centre (showcase and attraction)	Strong	Medium	Medium	Limited	High	Limited	Strong	Less than 5 FTE	Medium	Council	High	Medium	Medium	None	No	Regionally Unique
Great Trail development	Limited	Limited	Medium	Limited	High	None	Medium	Less than 5 FTE	Medium	Other Govt.	High	Very Low or None	None	Medium	No	Locally Unique
Great Western accommodation development (60 rooms)	Limited	Medium	Medium	None	High	Medium	Medium	11-20 FTE	High	Private	Very Low or None	High	None	None	Yes	Locally Unique
Green Hill Lake walking track development	None	Limited	Limited	Limited	Low	None	Limited	n/a	Medium	Other Govt.	High	Very Low or None	None	Limited	Yes	Locally Unique
Hamilton CBD branded accommodation (60+ rooms)	Medium	Medium	Strong	None	High	Medium	None	21-50 FTE	High	Private	Very Low or None	High	None	None	No	Locally Unique
Hamilton Gallery revitalisation	Medium	Medium	Strong	Medium	High	Strong	None	5-10 FTE	High	Council	High	Very Low or None	High	Medium	No	Regionally Unique
Hamilton Gardens weekends (public and private)	Medium	Medium	Medium	Medium	Medium	Limited	Medium	Less than 5 FTE	Medium	Mixed	Very Low or None	High	None	Limited	Yes	Locally Unique
Heath Street upgrades & bridge	None	None	n/a	Medium	None	Strong	Limited	n/a	n/a	Council	High	Very Low or None	None	None	No	None
Heritage accommodation in St Arnaud	Medium	Medium	Limited	Limited	Low	Medium	Limited	11-20 FTE	Medium	Private	Very Low or None	High	None	Limited	No	None
Horsham Aerodrome redevelopment	Strong	Strong	Strong	Medium	Medium	Strong	Strong	21-50 FTE	High	Council	High	Low	None	Medium	No	Regionally Unique
Horsham brewery	Limited	Limited	Medium	Limited	High	Limited	Limited	5-10 FTE	Medium	Private	Very Low or None	High	Low	None	No	Locally Unique

Opportunity Name	Ability to encourage stronger international visitation	Ability to encourage stronger interstate visitation	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding for Project	Alignment with Experience Victoria	Catalyst project to stimulate other investment	Dispersal of Visitors	Employment (Operational) Potential	Estimated Visitation	Landowner	Level of Public Investment Required (as a % of total investment)	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for the	Requirement for ongoing operational Govt. funding	Short term to Activate	Uniqueness of Product
Horsham CBD branded accommodation (80+ rooms)	Medium	Medium	Strong	None	High	Medium	None	More than 50 FTE	High	Private	Very Low or None	High	None	None	No	Locally Unique
Horsham Equestrian Centre	Limited	Limited	Medium	Medium	Low	Limited	Limited	Less than 5 FTE	Medium	Unknown	Medium	Medium	Low	Limited	No	Regionally Unique
Horsham Motorcycle Club facility improvements	Limited	Limited	Medium	Limited	None	Limited	None	Less than 5 FTE	Low	Private	Medium	Medium	None	Limited	No	Locally Unique
Horsham Motorsport Raceway development	Limited	Limited	Medium	Medium	None	Limited	None	Less than 5 FTE	Low	Private	Medium	Medium	None	Limited	No	Locally Unique
Horsham public art and First Peoples' interpretive content	None	None	None	Medium	Medium	None	Limited	n/a	Low	Council	High	Very Low or None	None	Medium	No	Locally Unique
Implementation of the Volcanic Trail Masterplan (including upgrade of Penshurst Volcanoes Discovery Centre).	Medium	Medium	Medium	Limited	Medium	Medium	Strong	5-10 FTE	Medium	Council	High	Very Low or None	Medium	Medium	No	Regionally Unique
Indoor activity centre	Limited	Medium	Medium	Medium	Low	Limited	None	11-20 FTE	High	Private	Very Low or None	High	High	None	Yes	Regionally Unique
Kara Kara National Park project	Limited	Medium	Limited	Medium	Medium	none	Strong	0	Medium	Parks Victoria	High	Very Low or None	None	High	No	Locally Unique
Laharum cycle trail linking native flowers and boutique operators	None	Limited	Limited	Limited	Medium	None	Medium	0	Low	Mixed	High	Very Low or None	None	Limited	No	Locally Unique
Lake Bellfield improvement	Limited	Limited	Limited	Limited	Medium	Limited	Medium	Less than 5 FTE	Medium	Other Govt.	High	Very Low or None	None	Medium	No	Locally Unique
Mackenzie Falls master plan	n/a	n/a	n/a	Medium	None	Medium	Limited	n/a	High	Parks Victoria	High	Very Low or None	None	Medium	Yes	n/a
Mount Zero Resort (Stage 2)	Medium	Medium	Strong	Limited	High	Medium	Limited	5-10 FTE	Medium	Private	Very Low or None	High	None	None	No	None
Multi-use trails across SGSC	Limited	Limited	None	Limited	Low	Limited	Medium	Less than 5 FTE	Low	Other Govt.	High	Very Low or None	None	Medium	No	Locally Unique
Napier Street retail facades	None	None	Limited	Limited	None	None	None	n/a	None	Council	High	Very Low or None	None	Limited	No	None
Nati climbing festival	Medium	Medium	Limited	Limited	Medium	None	Medium	Less than 5 FTE	Low	Mixed	High	Medium	None	None	No	State-wide Unique

Opportunity Name	Ability to encourage stronger international visitation	Ability to encourage stronger interstate visitation	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding for Project	Alignment with Experience Victoria	Catalyst project to stimulate other investment	Dispersal of Visitors	Employment (Operational) Potential	Estimated Visitation	Landowner	Level of Public Investment Required (as a % of total investment)	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for the	Requirement for ongoing operational Govt. funding	Short term to Activate	Uniqueness of Product
Ongoing activation of City to River Masterplan	None	None	Limited	Medium	Low	Medium	Limited	5-10 FTE	Medium	Council	High	Very Low or None	None	Limited	No	Locally Unique
Orchid tours, orchid house, and spring flower tours	Medium	Medium	Medium	Limited	Low	Limited	Limited	5-10 FTE	Low	Council	High	Very Low or None	None	Limited	No	Regionally Unique
Outdoor multi-purpose sports precinct	None	Limited	Limited	Limited	None	Limited	Limited	Less than 5 FTE	Medium	Council	High	Very Low or None	None	Medium	No	Locally Unique
Pedestrian priority for Halls Gap (once Heath Street bridge is developed)	Strong	Strong	Strong	Strong	Medium	Strong	Limited	n/a	High	Mixed	High	Very Low or None	None	Medium	No	Nationally Unique
Public (paid) shuttle to key Grampians sites during peak periods	Limited	Limited	Limited	Medium	Medium	Medium	Strong	Less than 5 FTE	Medium	Parks Victoria	High	Very Low or None	None	High	Yes	Regionally Unique
Public toilet facilities at Dunkeld Arboretum	n/a	n/a	n/a	Medium	None	n/a	None	n/a	High	Mixed	High	Very Low or None	None	Medium	No	n/a
Queen Mary Botanic Gardens heritage precinct	Limited	Limited	None	Limited	Low	Limited	Limited	n/a	Medium	Council	High	Very Low or None	None	Medium	No	Locally Unique
Railway station/silo art	Limited	Limited	Limited	Limited	Medium	None	Medium	n/a	Medium	Council	High	Very Low or None	None	Medium	No	Locally Unique
Reassessment of GPT 2-3-day walking treks from Dunkeld	Limited	Limited	Limited	Limited	High	Limited	Medium	n/a	Medium	Parks Victoria	High	Very Low or None	None	Medium	No	Locally Unique
Recreational fishing and competition	Limited	Medium	Limited	Limited	Low	None	Medium	Less than 5 FTE	Low	Council	Very Low or None	High	None	Limited	Yes	Locally Unique
Red Rock Olives high-end villa accommodation	Limited	Medium	Medium	Limited	High	Limited	None	Less than 5 FTE	Low	Private	Very Low or None	High	None	None	No	Regionally Unique
Red Rock Olives worker accommodation	Limited	Limited	Limited	Limited	Medium	Medium	None	5-10 FTE	Low	Private	Very Low or None	High	None	None	No	None
Regional indoor sports precinct	None	Limited	Limited	Limited	None	None	Limited	Less than 5 FTE	Medium	Council	High	Very Low or None	Low	Medium	No	Locally Unique
Restaurant & function centre on the river edge	Medium	Medium	Medium	None	Low	Limited	None	11-20 FTE	Medium	Private	Very Low or None	High	Low	None	No	None
RV parking spots along Barkly St in Ararat CBD	n/a	n/a	n/a	Limited	None	n/a	None	n/a	n/a	Council	High	Very Low or None	None	None	Yes	n/a

Opportunity Name	Ability to encourage stronger international visitation	Ability to encourage stronger interstate visitation	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding for Project	Alignment with Experience Victoria	Catalyst project to stimulate other investment	Dispersal of Visitors	Employment (Operational) Potential	Estimated Visitation	Landowner	Level of Public Investment Required (as a % of total investment)	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for the	Requirement for ongoing operational Govt. funding	Short term to Activate	Uniqueness of Product
Sawyer Park Soundshell upgrade	n/a	n/a	Limited	Medium	None	None	Limited	n/a	n/a	Council	High	Very Low or None	None	Medium	No	Locally Unique
Shared path from Halls Gap to Pomonal	Limited	Limited	n/a	Medium	Low	Limited	Strong	n/a	Medium	Mixed	High	Very Low or None	None	Medium	No	Locally Unique
Silo accommodation at Mill Street Silos (feasibility study)	Limited	Limited	Medium	Limited	Low	Medium	Limited	Less than 5 FTE	Low	Unknown	High	Very Low or None	None	None	No	State-wide Unique
Stawell CBD branded accommodation (30+ rooms)	Limited	Medium	Strong	None	High	Medium	None	11-20 FTE	Medium	Private	Very Low or None	High	None	None	No	Locally Unique
Stawell Gift enhancements	Limited	Medium	Limited	Medium	None	Limited	Strong	5-10 FTE	Medium	Council	High	Very Low or None	None	Limited	Yes	Regionally Unique
Story of gold fields and link to the current gold mine	None	None	Limited	Limited	None	None	Medium	Less than 5 FTE	Medium	Other Govt.	High	Very Low or None	Low	Medium	No	Locally Unique
The Bath House Pomonal	Medium	Strong	Strong	None	High	Limited	None	Less than 5 FTE	Low	Private	Very Low or None	High	Medium	None	No	Locally Unique
The Zoo Trail development	Limited	Limited	Limited	Limited	None	none	Strong	0	Medium	Mixed	High	Very Low or None	None	Medium	No	Locally Unique
Updated entrance way & admin building for Halls Gap Zoo	Limited	Limited	Limited	Limited	Low	Limited	Limited	Less than 5 FTE	Medium	Private	Very Low or None	High	None	None	Yes	Locally Unique
Upgrade an existing Bowls Club to enable the hosting of regional events	None	Limited	Limited	Limited	None	Limited	None	Less than 5 FTE	Low	Council	Medium	Medium	None	Medium	No	Locally Unique
Upgrade an existing tennis facility to enable the hosting of regional events	None	Limited	Limited	Limited	None	Limited	None	Less than 5 FTE	Low	Council	Medium	Medium	None	Medium	No	Locally Unique
Upgrade City Oval as Horsham's premier regional AFL/cricket venue	None	Limited	Limited	Limited	None	Limited	None	Less than 5 FTE	Medium	Council	Medium	Medium	None	Medium	No	Locally Unique
WAMA - National Centre for Environmental Art	Medium	Limited	Strong	Medium	Medium	Limited	Limited	5-10 FTE	Medium	Private	High	Low	High	Limited	No	Regionally Unique
Wesley Performing Arts Centre Refurbishment	Limited	Limited	Limited	Medium	High	None	None	Less than 5 FTE	Low	Council	High	Low	Low	Medium	No	Regionally Unique

Opportunity Name	Ability to encourage stronger international visitation	Ability to encourage stronger interstate visitation	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding for Project	Alignment with Experience Victoria	Catalyst project to stimulate other investment	Dispersal of Visitors	Employment (Operational) Potential	Estimated Visitation	Landowner	Level of Public Investment Required (as a % of total investment)	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for the	Requirement for ongoing operational Govt. funding	Short term to Activate	Uniqueness of Product
Wimmera River Discovery Trail Stage 2 (Horsham to Dimboola)	Limited	Limited	None	Limited	Medium	Limited	Medium	Less than 5 FTE	High	Council	High	Very Low or None	None	Limited	No	Locally Unique

Appendix 5 Full Matrix with Scores

Table 18: Full Matrix with Weighted Scores – Development Projects

	Ability to encourage stronger international	Ability to encourage stronger interstate	Ability to Grow Visitor Yield Score	Ability to Secure Govt. Funding for Project Score	Alignment with Experience Victoria 2033 Score	Catalyst project to stimulate other investment	Dispersal of Visitors Score	Employment (Operational) Potential Score	Estimated Visitation Score	Landowner Score	Level of Public Investment Required (as a % of total	Likelihood to be profiled by Visit Victoria Score	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for	Requirement for ongoing operational Govt. funding	Short Term to Activate Score	Uniqueness of Product Score	Total
Dunkeld geothermal bathing experience	6	9	15	2	8	10	4	6	4	6	12	6	12	15	8	0	4	**127**
4-star accommodation at Halls Gap	6	9	15	2	12	15	0	12	8	6	12	4	12	0	8	0	4	**125**
Indoor activity centre	2	6	10	4	4	5	0	9	12	6	12	6	12	15	8	4	8	**123**
Horsham CBD branded accommodation (80+ rooms)	4	6	15	0	12	10	0	15	12	6	12	4	12	0	8	0	4	**120**
Ararat CBD branded accommodation (80+ rooms)	4	6	15	0	12	10	0	15	12	6	12	4	12	0	8	0	4	**120**
Horsham Aerodrome redevelopment	6	9	15	4	8	15	12	12	12	4	0	6	4	0	4	0	8	**119**
Great Western accommodation development (60 rooms)	2	6	10	0	12	10	8	9	12	6	12	4	12	0	8	4	4	**119**
Brambuk upgrade	6	6	5	6	12	10	12	6	12	0	0	6	0	15	4	4	12	**116**
Hamilton CBD branded accommodation (60+ rooms)	4	6	15	0	12	10	0	12	12	6	12	2	12	0	8	0	4	**115**
Hamilton Gallery revitalisation	4	6	15	4	12	15	0	6	12	4	0	6	0	15	4	0	8	**111**
Mount Zero Resort (Stage 2)	4	6	15	2	12	10	4	6	8	6	12	4	12	0	8	0	0	**109**
The Bath House Pomonal	4	9	15	0	12	5	0	3	4	6	12	4	12	10	8	0	4	**108**
Stawell CBD branded accommodation (30+ rooms)	2	6	15	0	12	10	0	9	8	6	12	4	12	0	8	0	4	**108**
Pedestrian priority for Halls Gap (once Heath Street bridge is developed)	6	9	15	6	8	15	4	3	12	2	0	6	0	0	4	0	16	**106**
Grampians Wine Discovery Centre (showcase and attraction)	6	6	10	2	12	5	12	3	8	4	0	4	8	10	8	0	8	**106**
Chocolatarium (chocolate factory)	4	6	10	0	12	0	0	6	8	6	12	4	12	10	8	0	8	**106**
Grampians food & drink packages	4	6	10	2	12	5	8	3	4	6	12	2	12	5	6	4	4	**105**
Dunkeld luxury units	6	6	15	2	8	10	4	6	4	6	12	2	12	0	8	0	4	**105**
Ararat distillery	2	3	10	2	12	5	4	6	8	6	12	2	12	5	8	4	4	**105**

	Ability to encourage stronger international	Ability to encourage stronger interstate	Ability to Grow Visitor Yield Score	Ability to Secure Govt. Funding for Project Score	Alignment with Experience Victoria 2033 Score	Catalyst project to stimulate other investment	Dispersal of Visitors Score	Employment (Operational) Potential Score	Estimated Visitation Score	Landowner Score	Level of Public Investment Required (as a % of total	Likelihood to be profiled by Visit Victoria Score	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for	Requirement for ongoing operational Govt. funding	Short Term to Activate Score	Uniqueness of Product Score	Total
Expansion of J Ward Ghost Tours	2	3	5	4	4	5	4	6	8	2	12	4	12	10	6	4	12	**103**
WAMA - National Centre for Environmental Art	4	3	15	4	8	5	4	6	8	6	0	6	4	15	6	0	8	**102**
Horsham brewery	2	3	10	2	12	5	4	6	8	6	12	2	12	5	8	0	4	**101**
Hamilton Gardens weekends (public and private)	4	6	10	4	8	5	8	3	8	2	12	4	12	0	6	4	4	**100**
Ararat Sky Park	4	6	10	2	4	5	4	6	12	0	12	6	12	0	8	0	8	**99**
Agridome showcase attraction	4	6	10	4	4	5	4	6	12	6	0	4	8	10	4	0	12	**99**
Dark Matter Discovery Centre	4	6	10	2	4	10	0	6	8	6	0	4	0	15	6	0	16	**97**
Implementation of the Volcanic Trail Masterplan (including upgrade of Penshurst Volcanoes Discovery Centre)	4	6	10	2	8	10	12	6	8	4	0	4	0	10	4	0	8	**96**
Red Rock Olives high-end villa accommodation	2	6	10	2	12	5	0	3	4	6	12	2	12	0	8	0	8	**92**
Glamping pods	4	6	10	0	8	5	4	6	4	6	12	2	12	0	8	0	4	**91**
First Peoples' cultural tourism product development	6	3	10	4	12	5	4	6	8	2	0	6	8	0	4	0	12	**90**
Restaurant & function centre on the river edge	4	6	10	0	4	5	0	9	8	6	12	0	12	5	8	0	0	**89**
Destination holiday park	2	6	10	0	4	5	4	6	8	6	12	2	12	0	8	0	4	**89**
Heritage accommodation in St Arnaud	4	6	5	2	4	10	4	9	8	6	12	0	12	0	6	0	0	**88**
Updated entrance way & admin building for Halls Gap Zoo	2	3	5	2	4	5	4	3	8	6	12	4	12	0	8	4	4	**86**
Chalambar Golf Club accommodation and tourism feasibility study	2	3	10	2	8	5	4	3	4	6	12	2	12	0	8	0	4	**85**
Grampians wine cellars profiling	0	0	5	0	12	5	4	3	8	6	12	2	12	0	8	0	4	**81**
Red Rock Olives worker accommodation	2	3	5	2	8	10	0	6	4	6	12	0	12	0	8	0	0	**78**
Recreational fishing and competition	2	6	5	2	4	0	8	3	4	4	12	2	12	0	6	4	4	**78**
Horsham Equestrian Centre	2	3	10	4	4	5	4	3	8	1	4	2	8	5	6	0	8	**77**
Nati climbing festival	4	6	5	2	8	0	8	3	4	2	0	4	8	0	8	0	12	**74**
Public (paid) shuttle to key Grampians sites during peak periods	2	3	5	4	8	10	12	3	8	0	0	4	0	0	2	4	8	**73**

	Ability to encourage stronger international	Ability to encourage stronger interstate	Ability to Grow Visitor Yield Score	Ability to Secure Govt. Funding for Project Score	Alignment with Experience Victoria 2033 Score	Catalyst project to stimulate other investment	Dispersal of Visitors Score	Employment (Operational) Potential Score	Estimated Visitation Score	Landowner Score	Level of Public Investment Required (as a % of total	Likelihood to be profiled by Visit Victoria Score	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for	Requirement for ongoing operational Govt. funding	Short Term to Activate Score	Uniqueness of Product Score	Total
Stawell Gift enhancements	2	6	5	4	0	5	12	6	8	4	0	2	0	0	6	4	8	**72**
Expansion of gliding and fixed aviation events	4	6	10	2	4	5	4	3	8	4	0	2	8	0	4	4	4	**72**
Equine trails with tours	2	3	5	0	4	0	8	6	4	2	12	2	12	0	8	0	4	**72**
Silo accommodation at Mill Street Silos (feasibility study)	2	3	10	2	4	10	4	3	4	1	0	4	0	0	8	0	12	**67**
Ararat Trails mountain bike park	2	3	5	4	8	5	8	3	12	2	0	4	0	0	6	0	4	**66**
Ararat Hill Climb event expansion	4	6	5	2	0	5	8	6	8	2	0	2	8	0	6	4	0	**66**
Orchid tours, orchid house, and spring flower tours	4	6	10	2	4	5	4	6	4	4	0	2	0	0	6	0	8	**65**
Horsham Motorsport Raceway development	2	3	10	4	0	5	0	3	4	6	4	2	8	0	6	0	4	**61**
Great Trail development	2	3	10	2	12	0	8	3	8	2	0	2	0	0	4	0	4	**60**
Wimmera River Discovery Trail Stage 2 (Horsham to Dimboola)	2	3	0	2	8	5	8	3	12	4	0	2	0	0	6	0	4	**59**
Horsham Motorcycle Club facility improvements	2	3	10	2	0	5	0	3	4	6	4	2	8	0	6	0	4	**59**
Shared path from Halls Gap to Pomonal	2	3	5	4	4	5	12	3	8	2	0	2	0	0	4	0	4	**58**
Grampians Tourism Region Road Cycling Granfondo Event	4	6	5	4	4	0	8	3	4	2	0	4	0	0	2	4	8	**58**
Careers marketing event program	2	3	5	4	12	5	4	3	4	2	0	2	0	0	4	4	4	**58**
Activation of the Wimmera River in Horsham	0	3	5	2	8	5	4	3	8	6	0	2	0	0	8	4	0	**58**
Ongoing activation of City to River Masterplan	0	0	5	4	4	10	4	6	8	4	0	2	0	0	6	0	4	**57**
Mackenzie Falls master plan	2	3	5	4	0	10	4	3	12	0	0	2	0	0	4	4	4	**57**
Wesley Performing Arts Centre Refurbishment	2	3	5	4	12	0	0	3	4		0	2	4	5	4	0	8	**56**
Reassessment of GPT 2-3-day walking treks from Dunkeld	2	3	5	2	12	5	8	3	8	0	0	0	0	0	4	0	4	**56**
Lake Bellfield improvement	2	3	5	2	8	5	8	3	8	2	0	2	0	0	4	0	4	**56**
Railway station/silo art	2	3	5	2	8	0	8	3	8	4	0	4	0	0	4	0	4	**55**
Elevation of the Nati Frinj Biennale (greater profiling)	2	6	5	2	4	0	8	3	4	2	0	2	0	0	4	4	8	**54**
Kara Kara National Park project	2	6	5	4	8	0	12	0	8	0	0	2	0	0	2	0	4	**53**

	Ability to encourage stronger international	Ability to encourage stronger interstate	Ability to Grow Visitor Yield Score	Ability to Secure Govt. Funding for Project Score	Alignment with Experience Victoria 2033 Score	Catalyst project to stimulate other investment	Dispersal of Visitors Score	Employment (Operational) Potential Score	Estimated Visitation Score	Landowner Score	Level of Public Investment Required (as a % of total	Likelihood to be profiled by Visit Victoria Score	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for	Requirement for ongoing operational Govt. funding	Short Term to Activate Score	Uniqueness of Product Score	Total
Grampians Rail Trail completion (connection from Stawell to Halls Gap)	4	6	5	2	4	5	8	3	4	2	0	2	0	0	4	0	4	**53**
Dunkeld nature playground	0	0	5	4	4	5	4	3	12	4	0	2	0	0	6	0	4	**53**
Art, laneways, and culture tours of Horsham	2	3	10	2	4	5	0	3	4	2	0	2	0	0	6	4	4	**51**
Upgrade City Oval as Horsham's premier regional AFL/cricket venue	0	3	5	2	0	5	0	3	8	4	4	0	8	0	4	0	4	**50**
Ararat skate park event	2	3	5	2	4	5	0	3	4	4	0	2	0	0	6	4	4	**48**
Heath Street upgrades & bridge	0	0	5	4	0	15	4	3	4	4	0	0	0	0	8	0	0	**47**
Upgrade an existing tennis facility to enable the hosting of regional events	0	3	5	2	0	5	0	3	4	4	4	0	8	0	4	0	4	**46**
Upgrade an existing Bowls Club to enable the hosting of regional events	0	3	5	2	0	5	0	3	4	4	4	0	8	0	4	0	4	**46**
Public toilet facilities at Dunkeld Arboretum	2	3	5	4	0	5	0	3	12	2	0	2	0	0	4	0	4	**46**
Queen Mary Botanic Gardens heritage precinct	2	3	0	2	4	5	4	3	8	4	0	2	0	0	4	0	4	**45**
Green Hill Lake walking track development	0	3	5	2	4	0	4	3	8	2	0	0	0	0	6	4	4	**45**
The Zoo Trail development	2	3	5	2	0	0	12	0	8	2	0	2	0	0	4	0	4	**44**
RV parking spots along Barkly St in Ararat CBD	2	3	5	2	0	5	0	3	4	4	0	0	0	0	8	4	4	**44**
Laharum cycle trail linking native flowers and boutique operators	0	3	5	2	8	0	8	0	4	2	0	2	0	0	6	0	4	**44**
Dunkeld rubbish management	2	3	5	2	0	5	4	3	4	2	0	2	0	0	4	4	4	**44**
Story of gold fields and link to the current gold mine	0	0	5	2	0	0	8	3	8	2	0	2	0	5	4	0	4	**43**
Multi-use trails across SGSC	2	3	0	2	4	5	8	3	4	2	0	2	0	0	4	0	4	**43**
Ararat Dirt Mountain Bike 12 Hr Race	2	3	5	4	4	0	4	3	4	2	0	2	0	0	2	4	4	**43**
Regional indoor sports precinct	0	3	5	2	0	0	4	3	8	4	0	0	0	5	4	0	4	**42**
Outdoor multi-purpose sports precinct	0	3	5	2	0	5	4	3	8	4	0	0	0	0	4	0	4	**42**
Alexandra Gardens Boardwalk	2	3	5	2	8	0	0	0	8	1	0	2	0	0	6	0	4	**41**

	Ability to encourage stronger international	Ability to encourage stronger interstate	Ability to Grow Visitor Yield Score	Ability to Secure Govt. Funding for Project Score	Alignment with Experience Victoria 2033 Score	Catalyst project to stimulate other investment	Dispersal of Visitors Score	Employment (Operational) Potential Score	Estimated Visitation Score	Landowner Score	Level of Public Investment Required (as a % of total	Likelihood to be profiled by Visit Victoria Score	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction for	Requirement for ongoing operational Govt. funding	Short Term to Activate Score	Uniqueness of Product Score	Total
Sawyer Park Soundshell upgrade	2	3	5	4	0	0	4	3	4	4	0	0	0	0	4	0	4	**37**
Activation of the Green Lake Recreational Precinct Vision plan	0	3	5	2	4	0	4	0	4	2	0	2	0	0	6	0	4	**36**
Horsham public art and First Peoples' interpretive content	0	0	0	4	8	0	4	3	4	4	0	0	0	0	4	0	4	**35**
Napier Street retail facades	0	0	5	2	0	0	0	3	0	4	0	0	0	0	6	0	0	**20**
Ararat Town Entrance enhancements	0	0	0	2	0	0	0	0	4	4	0	0	0	0	6	0	4	**20**

STAFFORD STRATEGY

GRAMPIANS STRATEGIC TOURISM INVESTMENT PLAN

Date of last modification: 28/04/22

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STRATEGY

1. EXECUTIVE SUMMARY

1.1. Overview

Stafford Strategy was commissioned by Grampians Tourism to develop a Strategic Tourism Investment Plan & Investment Prospectus for the Grampians. The purpose of the project is to provide direction for the sustainable development of the visitor economy across the Grampians region (the region) and support the attraction of private investment particularly, to optimise the visitor economy across the region.

The project has been developed with careful guidance from the Project Control Group (PCG) which includes representatives from Grampians Tourism, each local government area (LGA), Parks Victoria, the Department of Jobs, Precincts and Regions: Regional Development Victoria and the Department of Jobs, Precincts and Regions: Tourism, Events and Visitor Economy.

While the focus of this project has been primarily on private tourism investment and how to encourage this, the consultation undertaken revealed many public opportunities that are needed to encourage and leverage a greater level of private investment.

1.2. Strategic Context

The Grampians region offers a strong nature-based and eco-destination proposition, supported by the iconic Grampians (Gariwerd) National Park which lies in the centre of the region. There are a variety of high-quality natural recreational experiences on offer, including the recently opened Grampians Peak Trail, which was developed as a result of significant government investment.

While the region offers a 5-star natural environment, the built environment does not consistently deliver the same level of standard. Despite strong levels of government investment, the region has struggled to attract new and ongoing investment in accommodation, attractions/experiences and the hospitality offering. COVID-19 has only served to further compound this challenge. This is a challenge that many regional locations across Victoria and Australia more broadly face. Victoria's Visitor Economy Recovery and Reform Plan April 2021 clearly states the need for "further investment in accommodation to increase the level of high-end and boutique accommodation"[1].

For this project, a smaller boundary has been designated for the region, covering only the LGAs of Ararat, Horsham and Northern and Southern Grampians as financial contributors to Grampians Tourism. Together, these four LGAs offer a diverse and exciting base to encourage new investment into the tourism sector.

[1] Visitor Economy Recovery and Reform Roadmap, page 8.

1.3. Regional Summary

Figure 1 provides a top-line summary of the Grampians' visitor economy (based on 2019 data to reflect pre-COVID results).

Figure 1: Regional Visitor Economy Summary

$297 million

visitor spend in the Grampians region, 2019[3]

1.7 million

visitors to the Grampians region, 2019[4]

Visitation by market[2]

- **43% - Domestic Overnight**
- **54% - Domestic Day**
- **3% - International overnight**

2.0 million

visitor nights in the region[5]

5,886 jobs

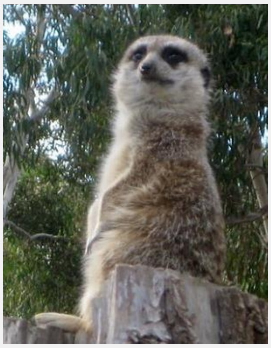
in tourism in the Grampians region, 2019[6]

$1.09 billion

In tourism output in the Grampians region, 2019

Top five regional visitor experiences[7]

The Pinnacle (Hiking Trail)



Halls Gap Zoo

The Balconies (Lookout)

Boroka Lookout

Horsham Botanical Gardens

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[2] NVS & IVS, Tourism Research Australia and trip spend data from TRA's Local Government Area Profiles
[3] NVS & IVS, Tourism Research Australia
[4] NVS & IVS, Tourism Research Australia
[5] NVS & IVS, Tourism Research Australia
[6] Remplan, 2019
[7] Based on TripAdvisor "best things to do." (https://www.tripadvisor.com.au/Attractions-g2328073-Activities-Grampians_Victoria.html). New product has more recently been added by Parks Victoria and in time, might replace or at a minimum add to those top-rated things to do in the region.

1.4. Vision

To guide the implementation of this Plan, the following vision has been developed.

"The Grampians will continue to attract tourism investment in new and existing ventures, building on its reputation as an outstanding nature-based destination which ultimately facilitates stronger visitor dwell time and spending to grow the benefits generated through the visitor economy."

1.5. Goals

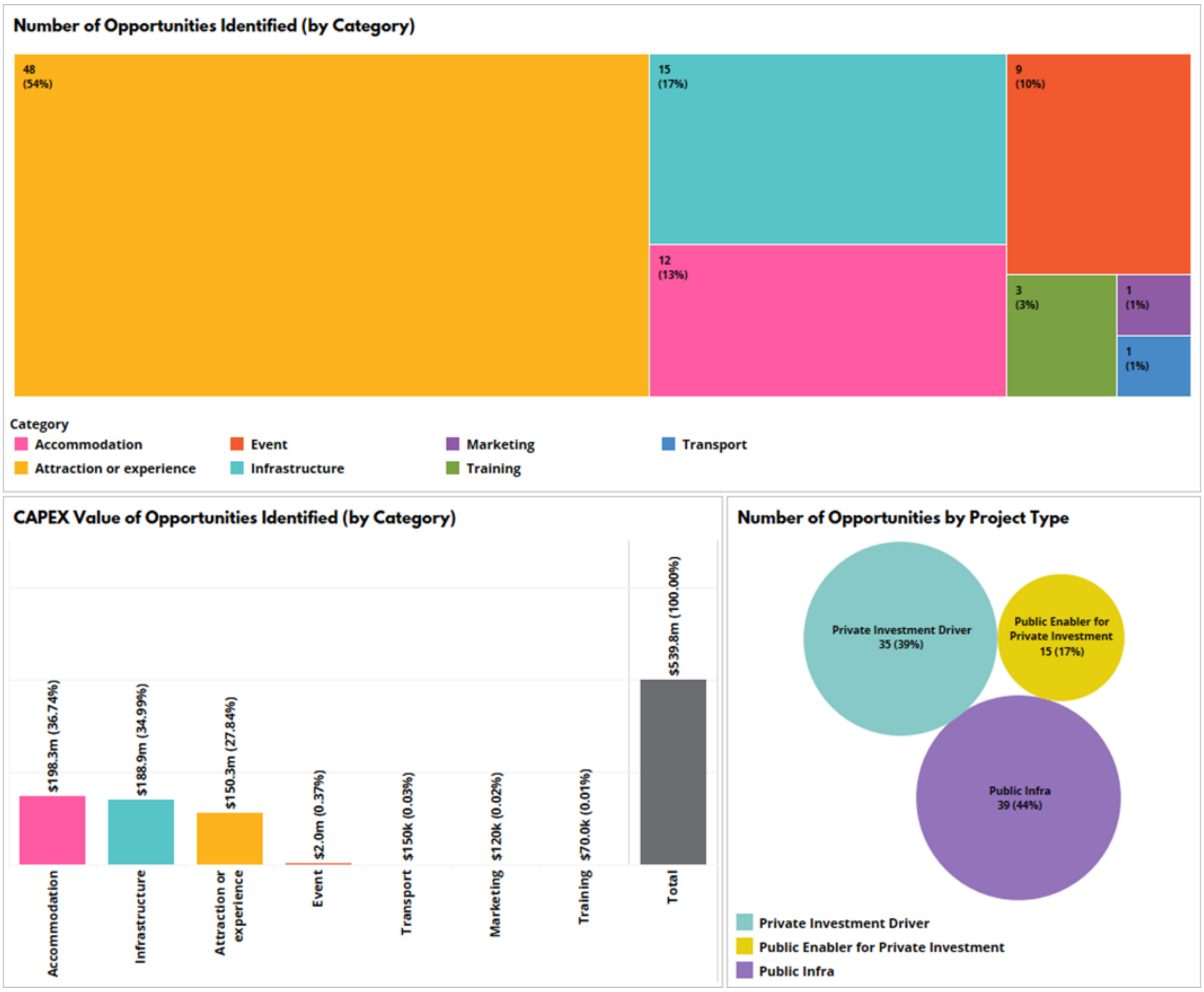
The following goals and indicators are included as measures that will be used to monitor the progress and success of this project.

Table 1: Goals

	Goal	Indicator
1.	Increase investment in tourism-based projects in the Grampians	■ Tourism investment in the region grows. ■ Reinvestment into existing products occurs (with the aim of refreshing current experiences and enhancing/expanding the offering). ■ The number of tourism-based products and experiences grows. ■ Visitor and resident satisfaction grow, measured via an annual survey. ■ Regional tourism indicators increase. ■ More locals participate in in-region tourism-based experiences. ■ Profile and awareness of the Grampians region as a destination grows.
2.	Grow tourism's contribution to the Grampians to ensure a thriving local economy and improved social wellbeing.	■ Regional tourism GDP increases, and tourism job opportunities grow. ■ Visitor yield, measured via average spend, increases. ■ The number of tourism-based products and experiences grows. ■ New tourism products are potentially featured by Visit Victoria. ■ The value of tourism to the region is expressed in positive local attitudes to continue to offer a social license for supporting the visitor economy.
3.	Ensure genuine partnership engagement occurs with Traditional Owners (TOs) to develop the region's visitor economy.	■ The number of tourism initiatives by TOs in the region grows. ■ TOs express their support for tourism and the opportunities it is seen to bring.
4.	Ensure tourism development and growth sustains and enhances the Grampians' natural and built environment for the benefit of residents first and foremost, and then its visitors.	■ New and/or improved amenities and infrastructure are introduced (cycleways, walking tracks, public toilets, rubbish facilities and interpretive and directional signage). ■ Progress towards Net Zero Emissions by 2050 goal is made. ■ Participation in regenerative tourism opportunities grows.
5.	Foster strong partnerships between private and public sector investment partners.	■ The number of active PPP projects in the region grows ■ Private sector confidence in the region increases

1.6. The Opportunities Identified

Figure 2: Summary of the opportunities identified



In total, **89** opportunities have been identified with the help of councils, industry, and state government. They are tourism-focused and categorised as:

- accommodation opportunities;
- attraction/experience-based opportunities;
- event opportunities;
- infrastructure opportunities;
- marketing opportunities
- training opportunities; or
- tourism transport opportunities.

Opportunities have also been segmented to whether they are:

- private investment drivers;
- public investment opportunities that are likely to facilitate private investment (i.e., public enablers for private investment); or
- public investment in infrastructure, events, and programs.

Many of the opportunities identified are supply-led and are aimed at introducing more commissionable products and private investment into the region's tourism offering. This is because the ultimate outcome of this project is an investment prospectus geared to stimulate private investment to build a far stronger visitor economy and to specifically generate more local visitor economy jobs. However, the public investment opportunities identified have also been outlined in this Plan as they are still very important, particularly as many are likely to act as catalysts to help stimulate private investment.

Figure 2 provides a summary of the opportunities identified. Observations are as follows.

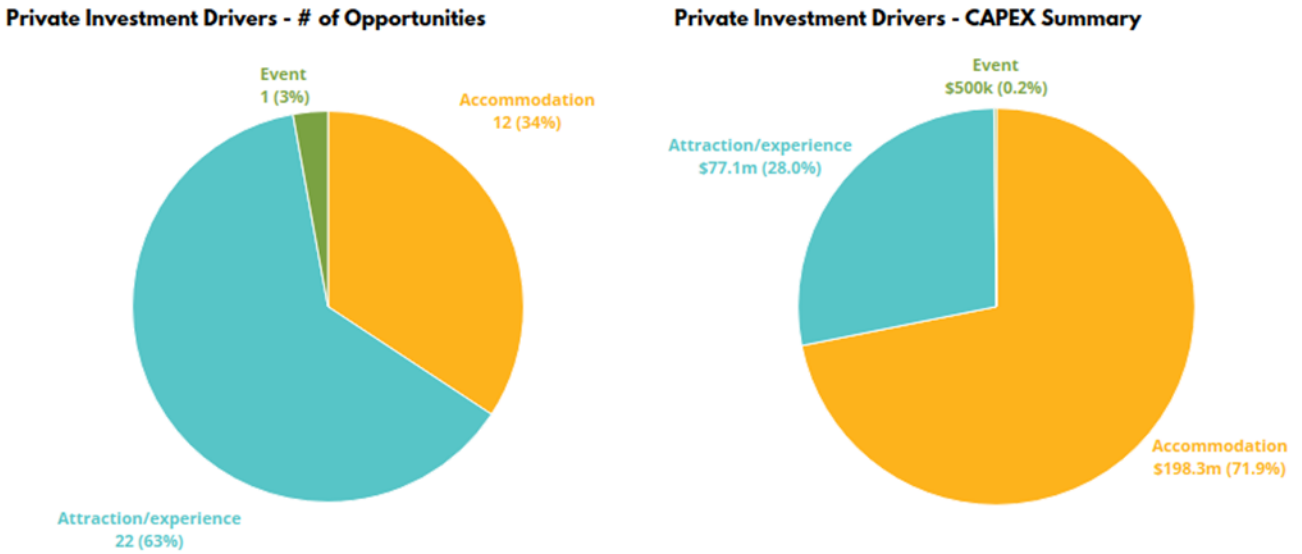
- Over half (54%) of the opportunities identified are attractions or experience investment opportunities, followed by infrastructure projects (17%) and accommodation investment opportunities (13%).

- In total, an estimated $540 million may be required to activate all 89 opportunities. The greatest level of investment identified is accommodation-related opportunities (comprising 37% of all investment identified or $198 million), followed by infrastructure, comprising (35% or $189 million).
- Of the 89 opportunities identified, 44% (39 opportunities) are public infrastructure opportunities, 39% (35) are private investment drivers and a further 17% (15) are public enablers for private investment.

CAPEX estimates are provided as estimates/guides only and exclude provision for contingencies (design development and escalation), consultant fees (legal, financial, engineering, architectural), government charges and builder's margins.

Narrowing in on the 35 private investment drivers shows that investment into new and existing attractions or experiences comprises the most opportunities identified, representing 22 of the 39 opportunities (Figure 3). While accommodation opportunities do not represent the most opportunities, they are likely to require a higher level of capital investment, accounting for just under 72% of the investment required for all private investment drivers (totalling $198 million).

Figure 3: Summary of the private investment driver opportunities identified



1.7. The Priority Opportunities

1.7.1. Private Investment Opportunities

To determine the refined list of private investment driver opportunities, each has been assessed against a number of weighted criteria. A weighted score has been applied, to reflect that some of the criteria can have a stronger positive impact or a higher level of importance, to each Council and the various agencies than other criteria. This weighting has been ranked and tested with the PCG to deliver an agreed weighting spread. Public infrastructure and public enabler projects have been ranked separately, in consultation with the PCG.

The assessment for private investment opportunities included the following determinants (The weighting of each was determined in consultation with the PCG).

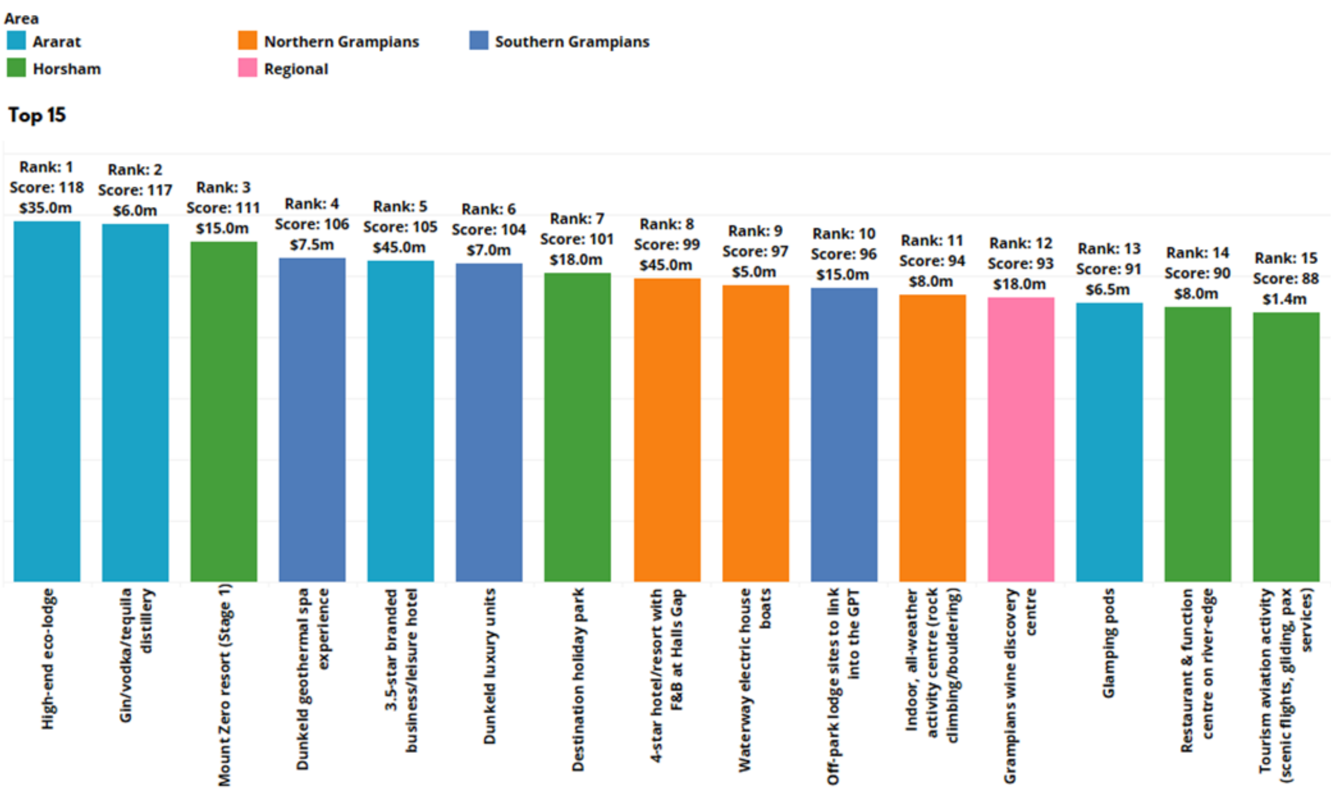
- Landowner
- Size of Private Investment
- Size of Public Investment
- Private Sector Interest
- Ability to secure government. funding for project
- Requirement for ongoing operational government funding
- Short term to activate
- Likelihood to be profiled by Visit Victoria
- Likely visitor appeal
- Ability to encourage regional dispersal of visitors
- Uniqueness of product
- Ability to grow visitor yield
- Estimated visitation once operational
- Employment (operational) potential
- Ability to act as a catalyst project to stimulate other investment projects
- Ability to encourage stronger interstate visitation
- Ability to encourage stronger international visitation

Figure 4 summarises the private investment driver opportunities that achieved a top 15 score based on the ranking methodology applied. Because some projects achieved an equal score, there are some with equal rankings.

In summary:

- there are eight accommodation investment opportunities and seven attraction/experience opportunities with a top 15 ranking;
- there is a range of types of projects identified across the various towns in the Grampians (four in both Northern Grampians and Horsham LGAs, three in both Ararat and Southern Grampians LGAs and one regional project); and
- the total investment for the top 15 projects is estimated at $240 million, of which $210.7 million is private investment and $29.7 million is supporting public investment.

Figure 4: The top 15 private investment driver opportunities (weighted score)



1.7.2. Public enablers for private investment

There were several public investment projects also identified. While these are not the primary focus of this project, they are important to note because they are likely to assist in encouraging stronger private investment interest. The projects were ranked with the assistance of the PCG and the top 5 projects in the two categories are summarised in Table 2.

Table 2: Top 5 public investment projects

Public enablers for private investment	Public funding opportunities in infrastructure, events, and programs
▪ Lake Bellfield improvements ▪ Implementation of Volcanic Trail Masterplan ▪ Grampians wine discovery centre ▪ Brambuk upgrade ▪ Airport site redevelopment (tourism product)	▪ Wimmera River Discovery Trail Stage 2 (Horsham to Dimboola) ▪ New Hamilton Art Gallery project ▪ Heath Street upgrades & bridge ▪ Halls Gap walking loop ▪ Ararat Trails Mountain Bike Park

1.8. Mechanisms to Encourage Investment

Investment is essential to build and maintain a competitive edge and a stronger visitor economy. The higher-risk nature of tourism investment means that there is often a need to help de-risk investment into the sector. Table 3 provides a summary of different mechanisms to encourage investment and reinvestment into tourism products. These are based on examples from various destinations, nationally and globally. They are provided to illustrate that there is often a need to "tilt the playing field" in different ways, to achieve the desired goal of stronger sustainable investment into the visitor economy.

Table 3: Summary of mechanisms to incentivise development/reinvestment

Stakeholders who can effect change:
◆ Federal Government ■ State Government ● Local Government ▲ Other

Non-financial Incentives	Floor space bonuses & height incentives ●	Release of Crown land for tourism development ● ■ ◆	Mixed-use development schemes ● ■	Exclusive zoning for tourism developments ● ■
	Reduction in accessible room requirements for hotels etc. under 15 rooms ●	Planning & Process Support ● ▲		
Financial Incentives	Tax exemptions/ concessions ■	Accelerated depreciation allowance for hotels etc. ■	Assisting with access to utility supply ● ■	Government-subsidised loans ■ ◆
	Income guarantee by operators ▲	Purchase of land and concessions on long term ground leases ● ■	Incentives for heritage conversion to tourism use ● ■	Direct Government Investment ● ■ ◆

1.9. Next Steps

The next steps in this project are to develop Packages 3 and 4. These packages include the following.

- Package 3: Development and design of a Grampians Tourism Investment Prospectus focused on the top private investment opportunities.
- Package 4: Development of a targeted Grampians Tourism Investment Attraction marketing/investor awareness campaign (this package is yet to be scoped and budgeted).

As outlined, Package 3 will be focused very much on promoting the top 15 private investment opportunities in the region. The Prospectus will be succinct and targeted and will also profile the strengths of the region and its various parts.

2. INTRODUCTION & CONTEXT

2.1. The Brief

Stafford Strategy was commissioned by Grampians Tourism to develop a Strategic Tourism Investment Plan & Investment Prospectus for the Grampians. The purpose of the project (which has been separated into four different work packages) is to provide direction for the sustainable development of the visitor economy across the Grampians region (the region) which identifies several game-changing projects and supports the attraction of investment in the next phase of tourism uplift across the region.

The work packages are as follows:

- Package 1: Research and Market Analysis report
- Package 2: Strategic Tourism Investment Plan report
- Package 3: Development and design of a Grampians Tourism Investment Prospectus
- Package 4: Development of a targeted Grampians Tourism Investment Attraction marketing/investor awareness campaign (this package 4 is yet to be scoped and budgeted)

This document represents the findings of both **Package 1** and **Package 2**. Package 1 and 2 elements comprise the strategic investment plan while Package 3 is a separate investment prospectus document, which builds on the findings of this report.

2.2. About The Grampians

The region is a prominent mountainous area located approximately three hours' drive northwest of Melbourne. The Grampians Region includes four Local Government Areas (LGAs), including:

- the Rural City of Ararat
- the Rural City of Horsham
- Northern Grampians Shire
- Southern Grampians Shire

While the region is strongly positioned as a big nature destination, primarily centred on the heritage-listed Grampians (Gariwerd) National Park and the recently developed Grampians Peak Trail (see Section 2.3 for more detail on the GPT), its large size and varied terrain lead to a diversity of product.

Other notable tourism products include the region's various waterways, the award-winning restaurant Wickens at Royal Mail Hotel, Halls Gap and Brambuk - The National Park and Cultural Centre.

Despite the significance of Grampians (Gariwerd) National Park, research into perceptions of Victorian tourism destinations "shows low and declining awareness of the Grampians as a holiday destination."[8] In addition, research (despite being undertaken some years ago) found that "nine out of ten Melbourne residents are unaware of the Grampians as a holiday destination"[2]. This appears to still be relevant and aligns with feedback provided during the consultation stages of this project.

Parts of the Grampians region fall along the Great Southern Touring Route (see Section 2.4) which offers a circuit-based route that links Melbourne, Ballarat, Halls Gap, Warrnambool, and several areas along the Great Ocean Road.

In 2019 (pre-COVID-19) the Grampians region attracted approximately 1.9 million domestic and international visitors who spent an estimated $291 million in the region. Tourism is critical to the economy of the region and generates an estimated 5,900 jobs (equating to 6.4% of jobs in the region).[9]

The domestic day trip market is the largest market for the region, comprising just under half (44%) of travel. This is similar to many destinations around Australia – many of which are trying to convert this market to an overnight market due to the greater yield that can be derived.

Although most visitors travel to the region in spring (estimated at 29%[10]) driven by strong visitation to the Grampians (Gariwerd) National Park, overall travel to the region is less seasonal than when compared to regional Victoria as a whole. This is a strength that could continue to be built on.

While the region offers an iconic natural environment, the built environment does not align. There is a need for new tourism investment to raise the quality of products and services offered (accommodation, infrastructure, and experiences) to improve alignment.

[8] 2016-20 Grampians Tourism Strategic Plan, page 2
[9] Remplan
[10] The Grampians Region receives the majority of its visitation in spring (29%) driven by strong visitation to the Grampians National Park.

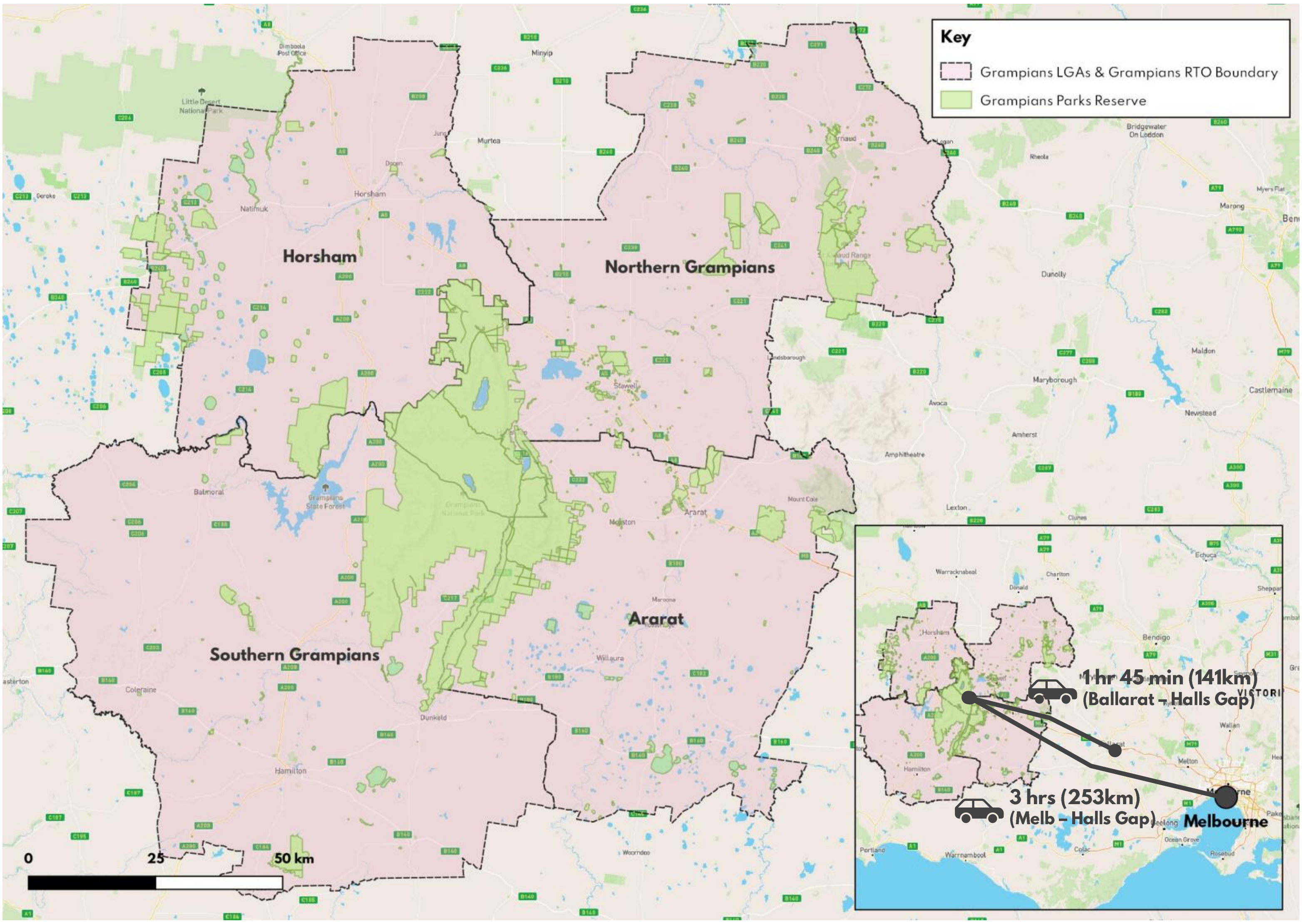
Figure 5 demonstrates the region's boundaries[11], the extent of national park land as well as linkages to the key hubs of Melbourne and Ballarat.

With many destinations shifting to a far stronger domestic tourism focus (as a result of COVID-19), the region's proximity to Ballarat as well as hubs along the Great Ocean Road is particularly important to recognise and continue to build on.

Discussions with stakeholders indicate the following.

- Halls Gap attracts primarily a leisure market including those visiting for trekking experiences in Grampians (Gariwerd) National Park coming from regional Victoria and Melbourne mostly via Ararat.
- Stawell and St Arnaud attract a leisure market coming through from Bendigo and other parts of regional Victoria as well as a business market relating to the operating gold mine and other business activities as well as a sports-based market coming for the Stawell Gift and other sporting events.
- Hamilton and Dunkeld attract a stronger business, special interest (education, sports, medical) and leisure market coming up from the Great Ocean Road especially and coming though from South Australia.
- Horsham attracts a stronger business, specialist interest and leisure market from South Australia and Mildura.
- Ararat attracts primarily a business and leisure (those coming to Pomonal and to trek in the Grampians) from regional Victoria and Melbourne.

Figure 5: The Grampians Region



[11] Although the Grampians region as defined by State Government covers a much larger area and many more Councils, Stafford has been instructed by Grampians Regional Tourism to focus on the four LGAs that fund the Grampians Regional Tourism body.

2.3. The Grampians Peak Trail

The spectacular Grampians Peaks Trail (160km), or the GPT, is a 13-day/12-night hiking experience through a variety of terrain in the Grampians (Gariwerd) National Park. The trail commences at Mt Zero in the north and heads south through to Dunkeld. The trail passes over the summit of Gar (Mt Difficult) and continues through Halls Gap with hiking highlights including Redman Bluff, Mount William, Major Mitchell Plateau, Signal Peak, Mt Abrupt, Mt Sturgeon before reaching Dunkeld in the south.

The development of the trail, which took six years, was the result of significant investment at both state and federal levels ($33 million). The investment included the development of 97 kilometres of new trail along with accommodation huts, 11 hike-in campgrounds, and trailheads (almost doubling the number of walking tracks in Victoria's fourth-largest national park).

The GPT is significant for the region, not only because of the level of investment achieved but also because it is anticipated to attract a diverse range of visitors to the region, including first-time and part-time walkers “beyond the more hardcore, regular” hikers.[12] This is because of the range/style of the accommodation offered and because the GPT is developed in such a way that enables visitors to undertake shorter walks (for example, 3-day, 2 night walks) as well as the full 12-night experience.

Figure 6: Grampians Peak Trail

[12] https://www.abc.net.au/news/2021-11-13/grampians-peaks-trail-opens-environment-cost-tourism-locals/100615772

2.4. The Great Southern Touring Route (GSTR)

The Great Southern Touring Route (GSTR) travels 842 km and offers a 5-day round trip. It travels along the coast of the Great Ocean Road, through to Grampians (Gariwerd) National Park and through the Goldfields and Daylesford spa region. Anecdotal feedback indicates it is comprehensive and well regarded, offering a diverse range of attractions and experiences to appeal to a range of visitor markets.

Figure 7: The Great Southern Touring Route

2.6. Visitor economy markets

The Grampians is a large region and each of its LGAs offer a diversity of tourism product. Some are far more concentrated on a traditional leisure tourism market, while others have a broader visitor economy focus and cover markets such as:

- Sports tourism
- Medical tourism
- Education tourism
- Business tourism
- Events tourism
- Agri and food-related tourism
- Visiting friends and relatives related travel

Each town's focus has primarily been derived as a result of the type of product on offer (both natural and built) and the individual strengths of their economies.

From the desktop research, consultation and site visits undertaken,it would appear the strengths and focus of the region's primary towns/clusters are as indicated in Table 1.

Based on consultation and analysis undertaken to date, the following is noted.

- The western side of Grampians (Gariwerd) National Park appears to have stronger connectivity to the national park and a far stronger emphasis on leisure-based tourism.
- Stawell, while having a strong focus on the national park because of its proximity to Halls Gap, also has a variety of other focuses because of the infrastructure it offers. This includes sport-based tourism and events (including the well-known Stawell Gift.) From a leisure tourism perspective, its gold mining history and dark matter research (via the Stawell Underground Physics Lab [13]) could also offer product development opportunities.
- While Dunkeld and Hamilton are within the same LGA, they have distinctly different market focuses. Dunkeld has a strong focus on leisure-based tourism and functions as the southern hub for entry to the National Park and is close to the southern trailhead of the GPT. Hamilton, on the other hand, has a broader visitor economy focus with strengths in education, medical and sport-based tourism, and a marketing relationship to the Great Ocean Road/Limestone Coast.
- With the Spirit of Tasmania relocating to Corio Quay in Geelong toward the end of 2022, this potentially provides further opportunity to grow visitation along the Great Southern Touring Route and into the southern parts of the Grampians region in particular. With Tasmania focusing strongly on nature-based tourism, there is strong complementary alignment between the two destinations and what visitor markets are often seeking.
- The Geelong City Deal aims to deliver a variety of tourism infrastructure projects along the Great Ocean Road, including for the Shipwreck Coast and other key locations along the Great Ocean Road, to strengthen the region as a leading tourist destination and ensure benefits flow to local communities. [14] Strengthening the Great Ocean Road as a visitor destination provides leverage opportunities, particularly through Great Southern Touring Route links.
- Connectivity to the Great Ocean Road also provides opportunities to leverage Avalon Airport as an additional gateway into the region.
- A large number of visitors to both Horsham and Hamilton come from South Australia, with Hamilton also benefitting from visitation from Portland and Port Ferry.
- Visitor travel patterns into the GNP show far stronger connectivity coming through Ararat and to a far lesser extent, via Hamilton or Horsham.

Table 4: Cluster strengths & focuses

	Leisure	Sport	Medical	Education	Business	Events	Agri/F&B	VFR
Ararat	✓				✓		✓	✓
Dunkeld	✓						✓	
Halls Gap	✓					✓	✓	
Hamilton		✓	✓	✓	✓	✓	✓	✓
Horsham		✓	✓		✓		✓	✓
St Arnaud								✓
Stawell		✓			✓	✓		✓

[13] https://www.supl.org.au/

[14] https://www.infrastructure.gov.au/territories-regions-cities/cities/city-deals/geelong-city-deal

2.7. Major attractions

The region has several major attractions across the various towns and natural assets available. The following outlines some of the key attractions and highlights the diversity of the region's offering which should continue to be built on. These are not listed in any priority order.

Grampians (Gariwerd) National Park

Halls Gap Zoo

Horsham Botanical Gardens

MacKenzies Falls, Grampians (Gariwerd) National Park

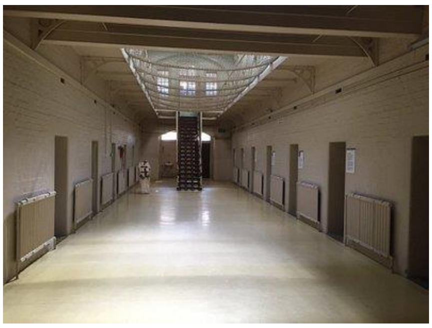
Nigretta Falls, Grampians (Gariwerd) National Park

Wannon Falls, Hamilton

Silo Art Trail, St Arnaud

Brambuk the National Park & Cultural Centre

Hamilton Gallery



J Ward Museum Complex

Gum San Chinese Heritage Centre

Stawell Oval

Reed Lookout, Grampians (Gariwerd) National Park

Boroka Lookout, Grampians (Gariwerd) National Park

Kellys Beach, Lake Fyans, Pomonal

Lake Wartook, Grampians (Gariwerd) National Park

Lake Bellfield, Halls Gap

The Balconies, Grampians (Gariwerd) National Park

2.8. Literature Review

There is a large number of documents, reports and strategies that have been prepared for the region and its individual LGAs by councils and state government agencies. Over 60 documents have been provided and reviewed. These have provided an extremely useful context for the project and have assisted in identifying the full list of project opportunities to be investigated. The full list of documentation reviewed for this Plan is included in Appendix 1.

3. DEMAND-SIDE ASSESSMENT

Understanding the size of the Grampians' visitor economy is important when planning for tourism investment. This includes insights into:

- the size of the visitor market, in terms of how many visitors are travelling to the region, and how this has changed over time;
- where visitors are coming from, including from domestic and international origins;
- the split between day trippers and overnight visitors; and
- total spending by visitors.

3.1. How data has been derived

It is particularly important to drill down to a smaller geographic area than the Grampians region because of the diversity of products on offer across the region's various towns.

To do this, visitor data has been compiled using the National and International Visitor Survey (NVS and IVS) data published by Tourism Research Australia (TRA). The NVS and IVS provide visitation data based on 'Statistical Area 2' (SA2) boundaries. Every LGA in Australia is made up of one or more SA2s. The SA2s included in the region are outlined in Figure 8 along with the council area that they fall in.

As per the methodology applied by TRA for LGAs[15], visitation data is averaged across three-year periods, rather than being provided on an annual basis. This minimises the impact of variability in estimates from year to year and provides more robust estimates. The data average periods are as follows.

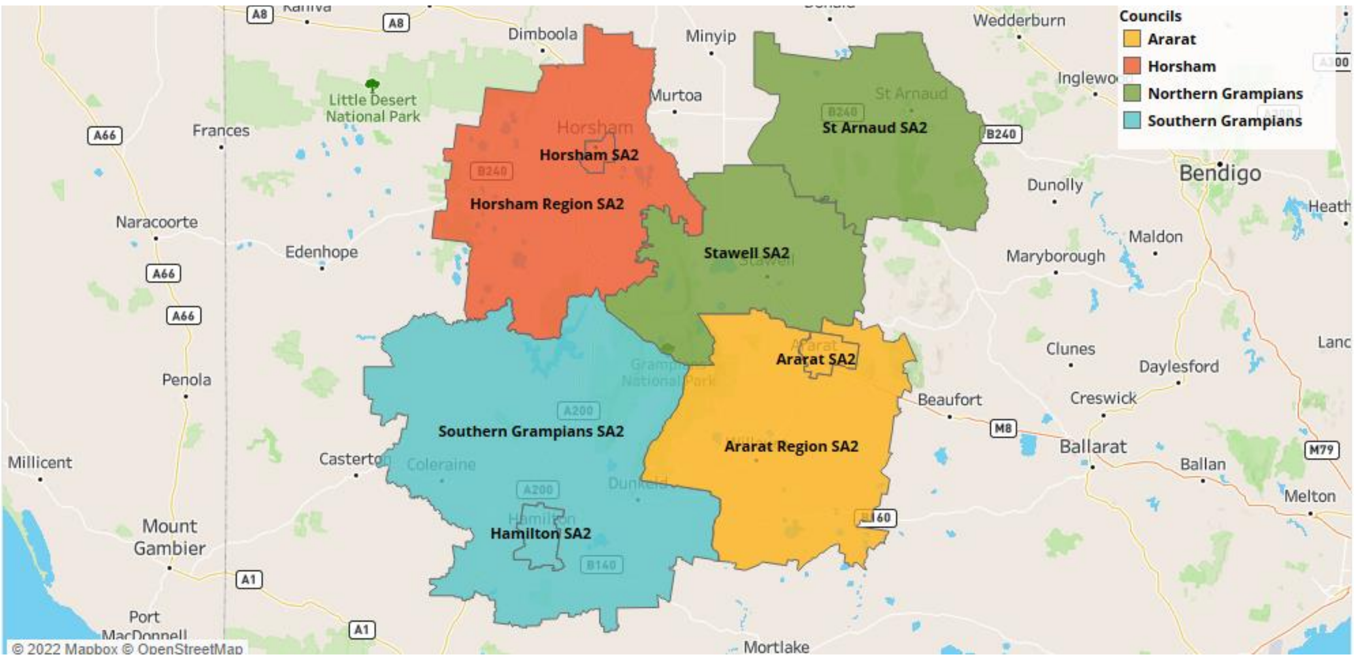
- 2013: reflects the average over 2011-2013;
- 2016: reflects the average over 2014-2016;
- 2019: reflects the average over 2017-2019; and
- 2021: reflects the average over 2020-2021 (this reflects a two-year period because they are both COVID-19 impacted years).

2019 (which comprises the average from 2017 to 2019) has been primarily focused on because it reflects non-COVID-19 impacted data and provides a more accurate reflection of actual visitation to each SA2.

September YE data (unless otherwise specified) has been applied as this is the most recent iteration of data released by TRA via the NVS and IVS at the time of writing this report.

It is important to note that data included in this report differs from the Regional Tourism Summary provided by TEVE for the Grampians because the geographic boundary for this report is smaller and excludes the Wimmera sub-region (which comprises Buloke, Nhill Region, Yarriambiack SA2s); it covers only the SA2s outlined in Figure 8.[16]

Figure 8: SA2s in the Grampians region



[15] https://www.tra.gov.au/research/regional-tourism/local-government-area-profiles/local-government-area-profiles

[16] Although the Grampians region as defined by State Government covers a much larger area and many more Councils, Stafford has been instructed by Grampians Regional Tourism to focus on the four LGAs that fund the Grampians Regional Tourism body.

3.2. Regional summary

The following reflects top-line results for the Grampians to illustrate the significance of the visitor economy pre-COVID.

$297 million

visitor spend in the Grampians region, 2019[18]

1.7 million

visitors to the Grampians region, 2019[19]

Visitation by market[17]

- **43% - Domestic Overnight**
- **54% - Domestic Day**
- **3% - International overnight**

2.0 million

visitor nights in the region[20]

5,886 jobs

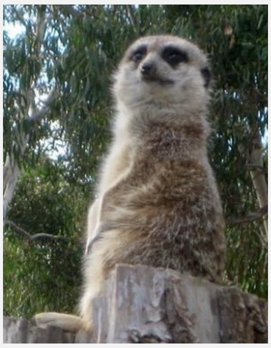
in tourism in the Grampians region, 2019[21]

$1.09 billion

In tourism output in the Grampians region, 2019

Top five regional visitor experiences[22]

The Pinnacle (Hiking Trail)



Halls Gap Zoo

The Balconies (Lookout)

Boroka Lookout

Horsham Botanical Gardens

[17] NVS & IVS, Tourism Research Australia and trip spend data from TRA's Local Government Area Profiles
[18] NVS & IVS, Tourism Research Australia
[19] NVS & IVS, Tourism Research Australia
[20] NVS & IVS, Tourism Research Australia
[21] Remplan, 2019
[22] Based on TripAdvisor "best things to do." (https://www.tripadvisor.com.au/Attractions-g2328073-Activities-Grampians_Victoria.html). New product has more recently been added by Parks Victoria and in time, might replace or at a minimum add to those top-rated things to do in the region.

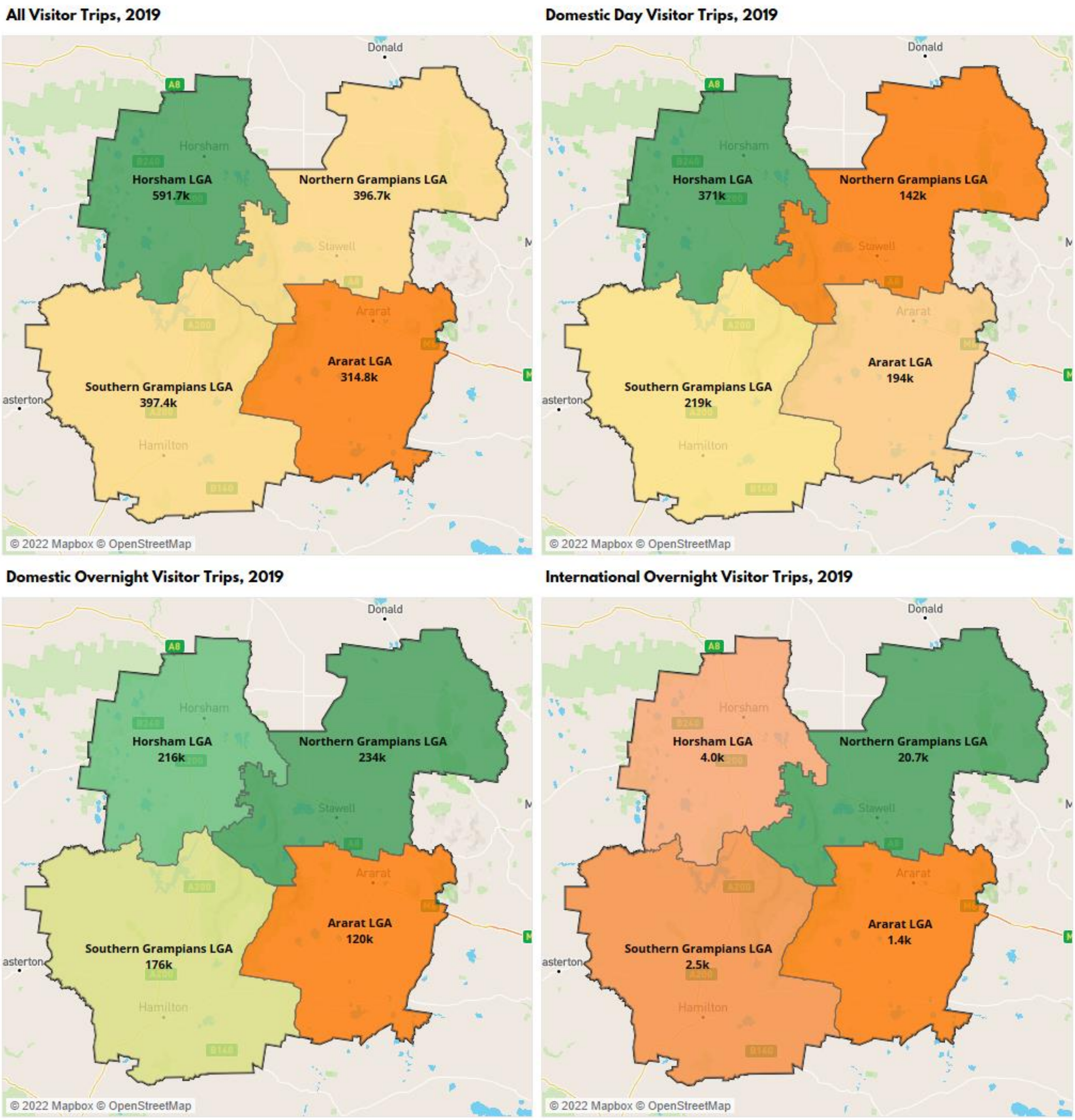
3.3. Visitor Trips

Figure 9 provides visitation data to each LGA in the Grampians for 2019. As of 2019, the most visited LGA in the region was Horsham (592,000 trips) followed by Northern and Southern Grampians which both received an estimated 397,000 visitors.

Importantly, visitation to each of the LGAs is largely concentrated around their associated urban areas.

While Horsham receives the greatest number of domestic day trip visitors, Northern Grampians has a stronger overnight (both domestic and international) visitor profile. This is likely because the gateway to Grampians (Gariwerd) National Park (the major leisure-based tourism product for the region), Halls Gap, is situated in the LGA.

Figure 9: Visits by LGA and visitor type, 2019 Sept YE[23]



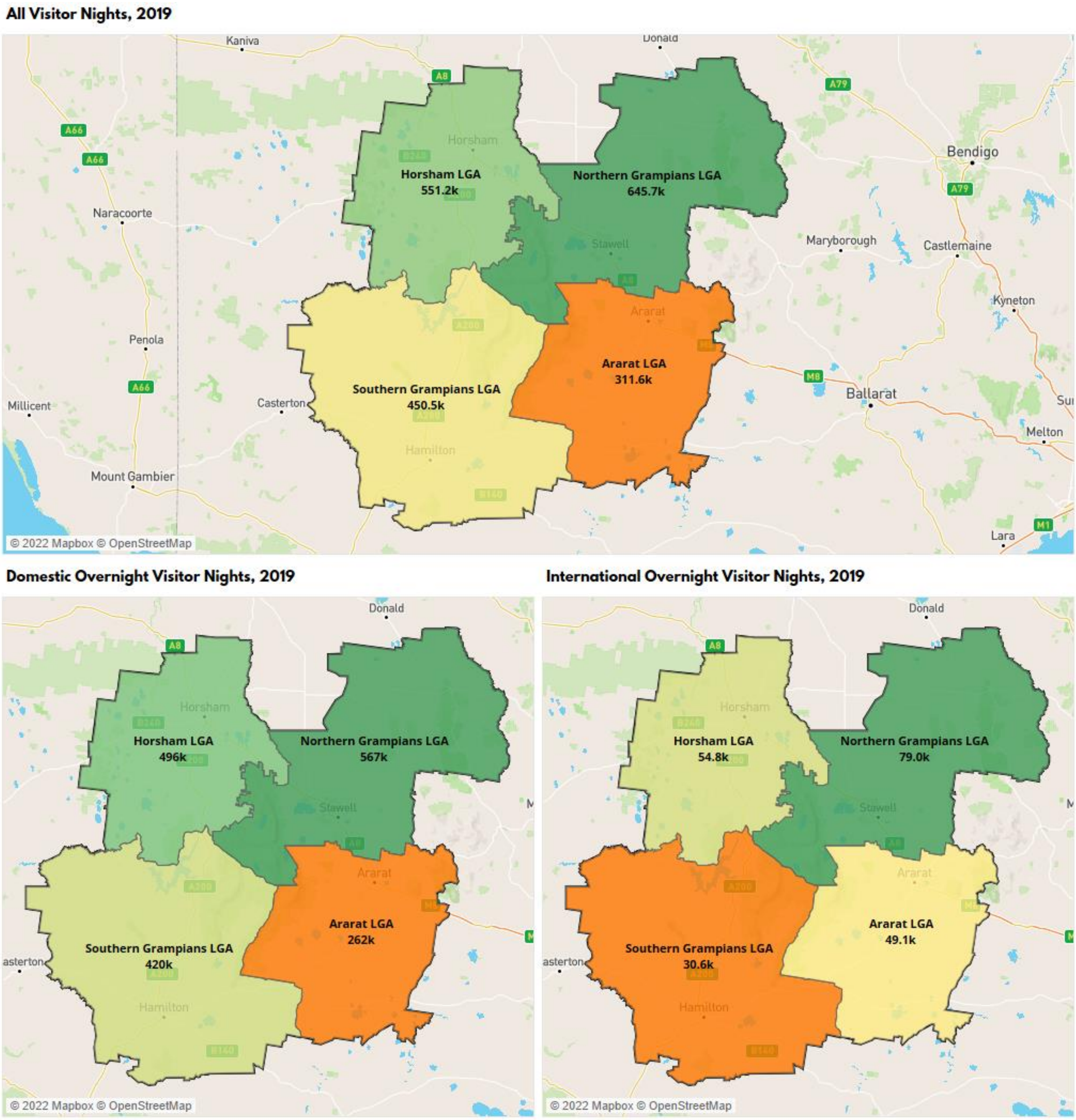
[23] Tourism Research Australia, National and International Visitor Surveys

3.4. Visitor Nights

Figure 10 illustrates visitor nights spent in each LGA in 2019. Northern Grampians received the most visitor nights (645,700) followed by Horsham (551,200). The domestic average length of stay (ALOS) in most LGAs in 2019 averaged between 2 – 3 nights and this has remained relatively constant when looking over the period 2013 to 2021. The international ALOS is more variable and is often heavily skewed towards those international travellers who are working in the region.

Although achieving solid growth in visitor nights is important, actual visitor daily spend patterns are probably even more significant to help guide the quality of future tourism investment, especially for new accommodation and attractions as paid visitor experiences.

Figure 10: Visitor nights by LGA and visitor type, 2019 Sept YE[24]



[24] Tourism Research Australia, National and International Visitor Surveys

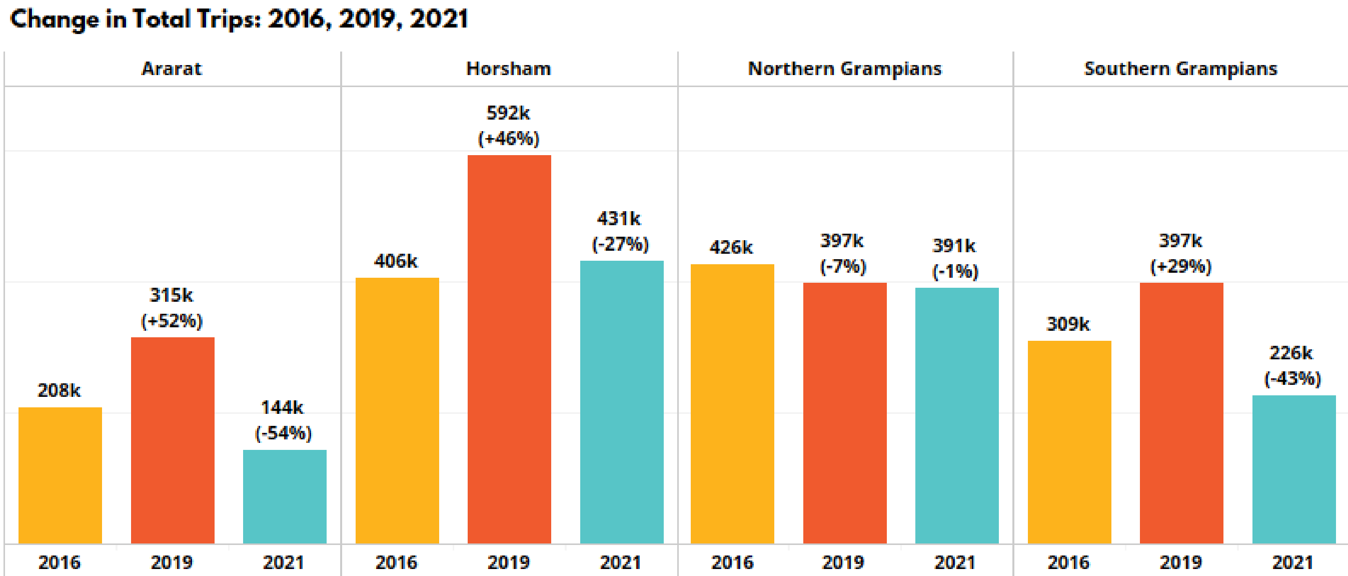
3.5. Change in Trips & Nights

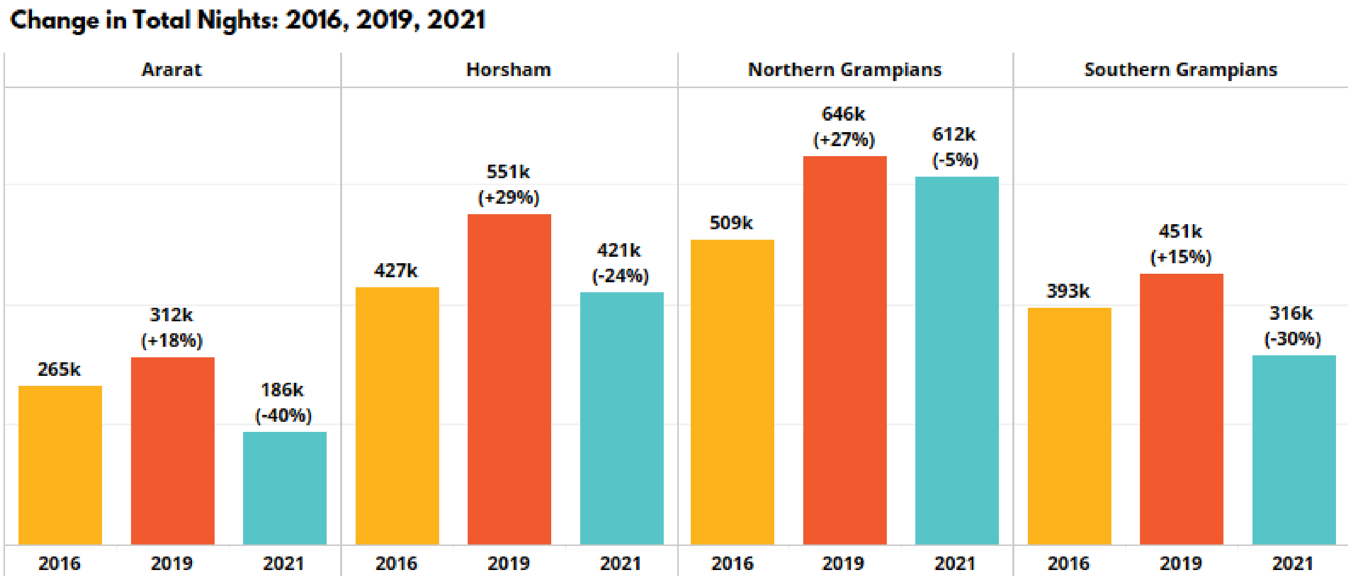
3.5.1. Total change in visitor trips & nights by LGA

Figure 11 demonstrates the change in the number of trips undertaken and nights spent in each LGA between 2016 and 2021. It shows that:

- Pre-COVID-19, most LGAs experienced growth in both trips and nights. The exception to this was Northern Grampians which experienced a 7% decline in visitor trips between 2016 and 2019.
- The LGAs most impacted by COVID-19, in terms of visits/nights, include Ararat, Horsham and Southern Grampians. Northern Grampians appears to be the least impacted. This could potentially be:
  - because of the desire by visitors to undertake intrastate leisure and recreation-based travel away from major urban areas such as Melbourne, Bendigo, Geelong whilst Halls Gap (within Northern Grampians) offers this; and
  - because of the opening of the GPT in late 2021 boosting the profile and interest in Halls Gap and the Grampians (Gariwerd) National Park with many outdoor experiences where visitor numbers can be well spread out.

Figure 11: Change in visitor trips and nights by SA2, 2016-2021 Sept YE[25]





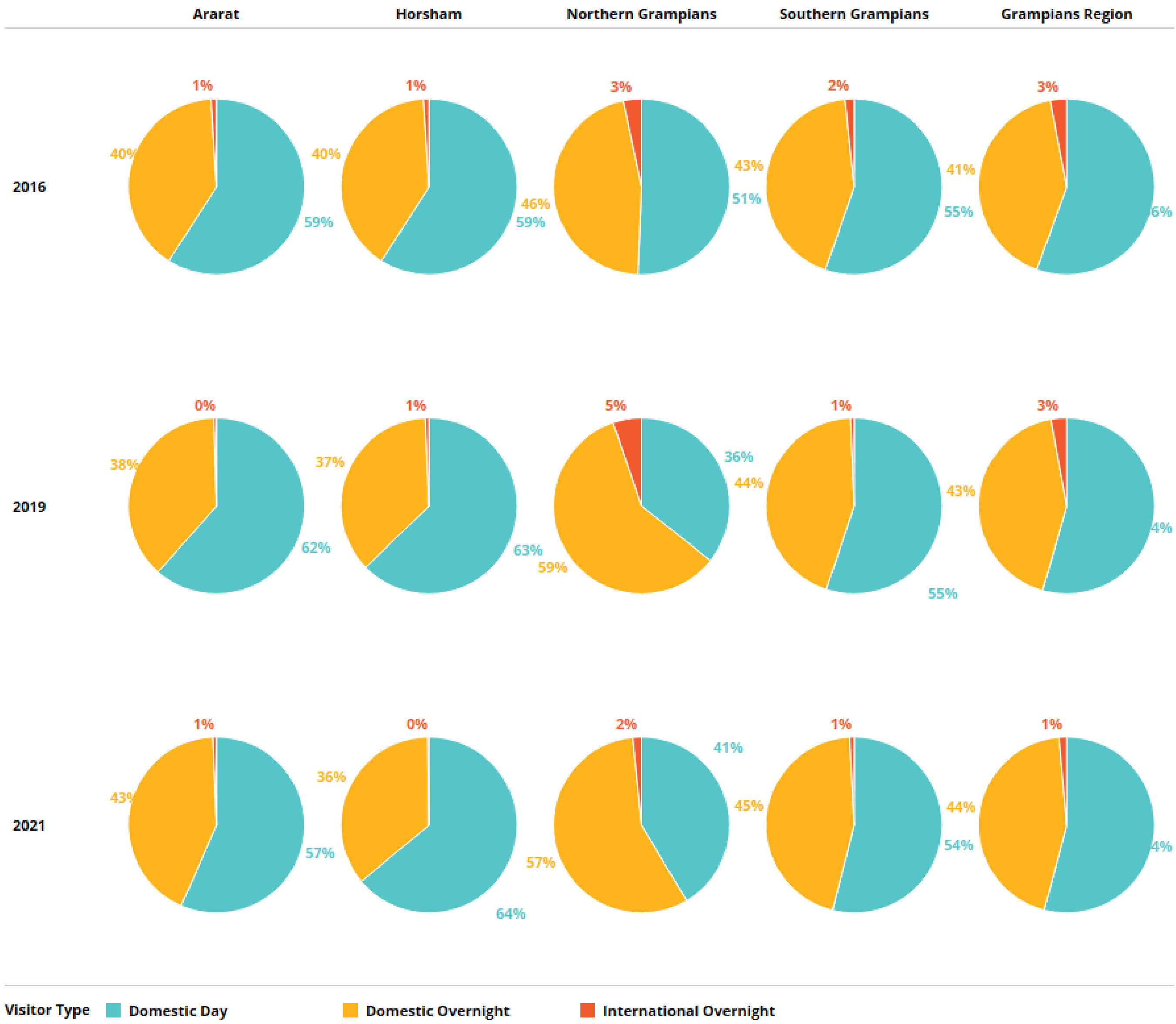
[25] Tourism Research Australia, National and International Visitor Surveys

3.5.2. Change by visitor type by LGA

Figure 12 shows the change in visitor type to each LGA between 2016 and 2021. It shows that:

- while international visitation has declined to each LGA because of COVID-19, it has typically always been a very small market for each LGA (even before COVID-19, international visitation comprised only 3% of travel to the Grampians region); and
- despite COVID-19, there has been little shift in the domestic profile for each LGA, with domestic day visitation typically comprising more than half of total visitation to each LGA across each period assessed (the only exception to this is the Northern Grampians).

Figure 12: Change by visitor type by LGA, 2016-2021 Sept YE[26]



[26] Tourism Research Australia, National and International Visitor Surveys

3.7. Visitor Spend

Figure 13 summarises estimated visitor spending in each LGA. Spend appears more heavily concentrated in Horsham and Northern Grampians (which also received the strongest visitor numbers). Overall average spend per visitor indicates:

- $98 per trip for domestic day trippers;
- $258 per trip for domestic overnight visitors; and
- $212 per trip for international overnight visitors.

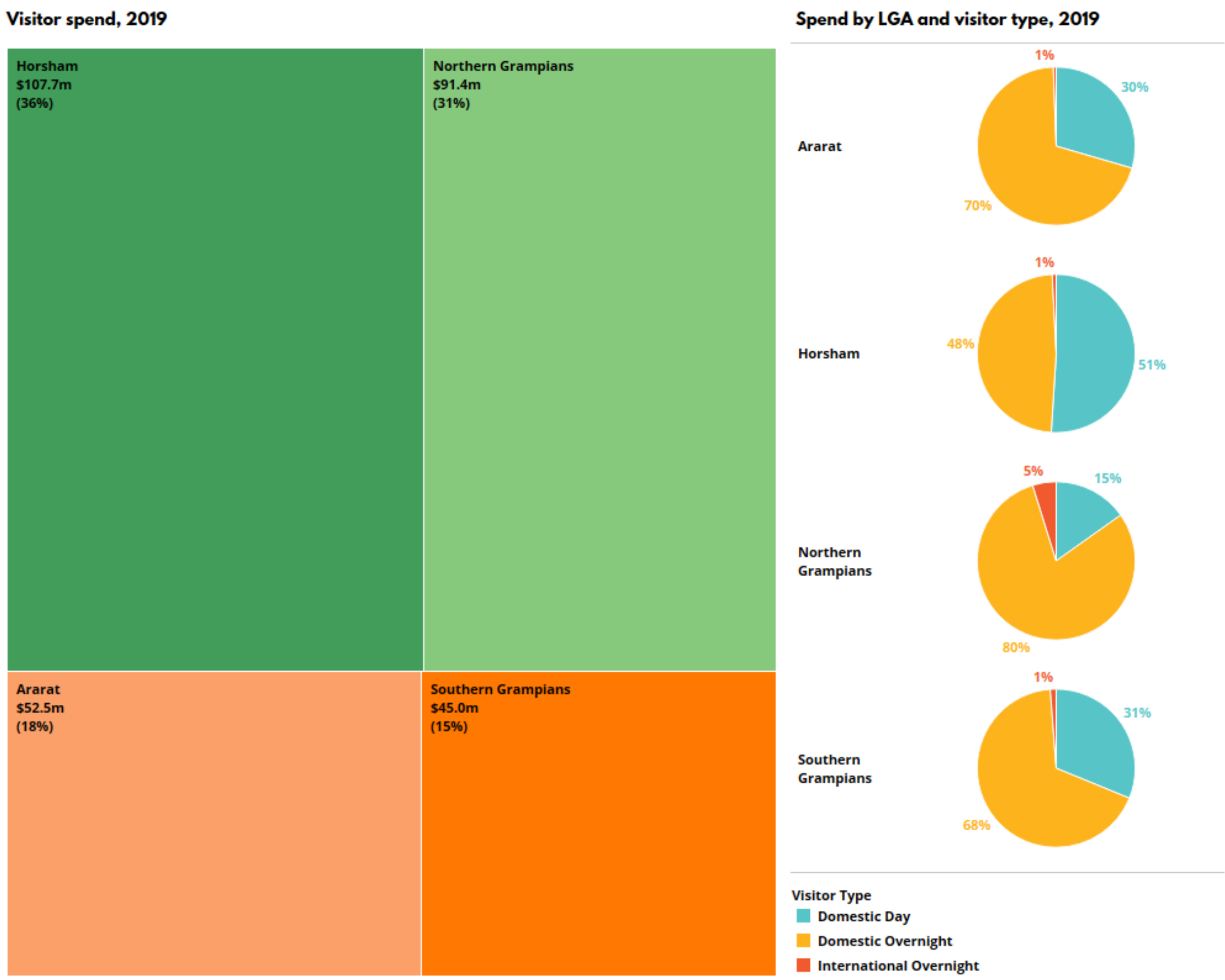
Compared with other regions throughout the country, these are relatively low spend averages, particularly for the overnight markets. By way of example[27]:

- Bendigo in Victoria has an average visitor spend of $116 for domestic day trippers; $309 for domestic overnight and $683 for international visitors.
- Blue Mountains region in NSW has an average visitor spend of $91 for domestic day trippers; $372 for domestic overnight and $429 for international visitors.
- Cairns in QLD has an average visitor spend of $186 for domestic day trippers; $1,167 for domestic overnight and $1,086 for international visitors.

This may be due to many people coming to camp who have brought their own food supplies, and for many others, a single night stay in the region rather than multi-night stays and associated meals.

The total visitor spend in the region is also heavily impacted by the 54% of visitors who are day visitors and do not stay overnight.

Figure 13: Visitor spend by LGA and visitor type, 2019 Sept YE[28]



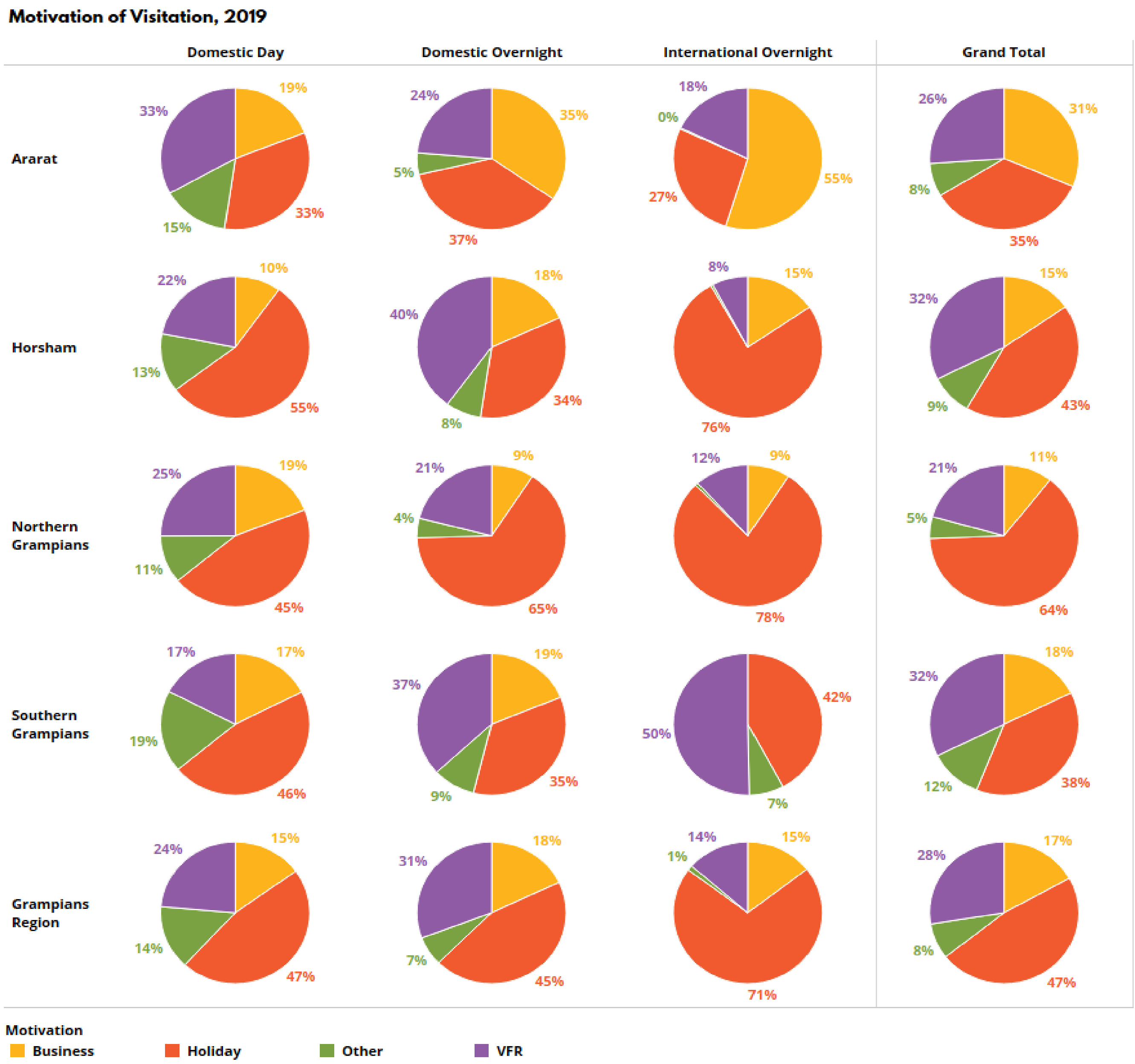
[27] Sourced from TRA LGA Profiles - https://www.tra.gov.au/Regional/Local-Government-Area-Profiles/local-government-area-profiles
[28] Tourism Research Australia, National and International Visitor Surveys

3.8. Motivation of Travel

Figure 14 demonstrates the motivation for travel by visitor type to each LGA along with the Grampians region in 2019. It shows that:

- holiday travel is the prominent motivation of travel for the domestic day trip market across each council area;
- domestic overnight travel is more evenly distributed across holiday, business, and VFR travel;
- holiday travel is the major motivation for travel for international visitors across each council area though numbers may take some time to come back; and
- Northern Grampians, which functions as the primary gateway into the Grampians (Gariwerd) National Park, has the largest proportion of holiday visitors (58% of all visitors to this LGA were travelling for a holiday), while Ararat and Southern Grampians have the greatest proportion of business travellers.

Figure 14: Motivation for travel, 2019 Sept YE[29]



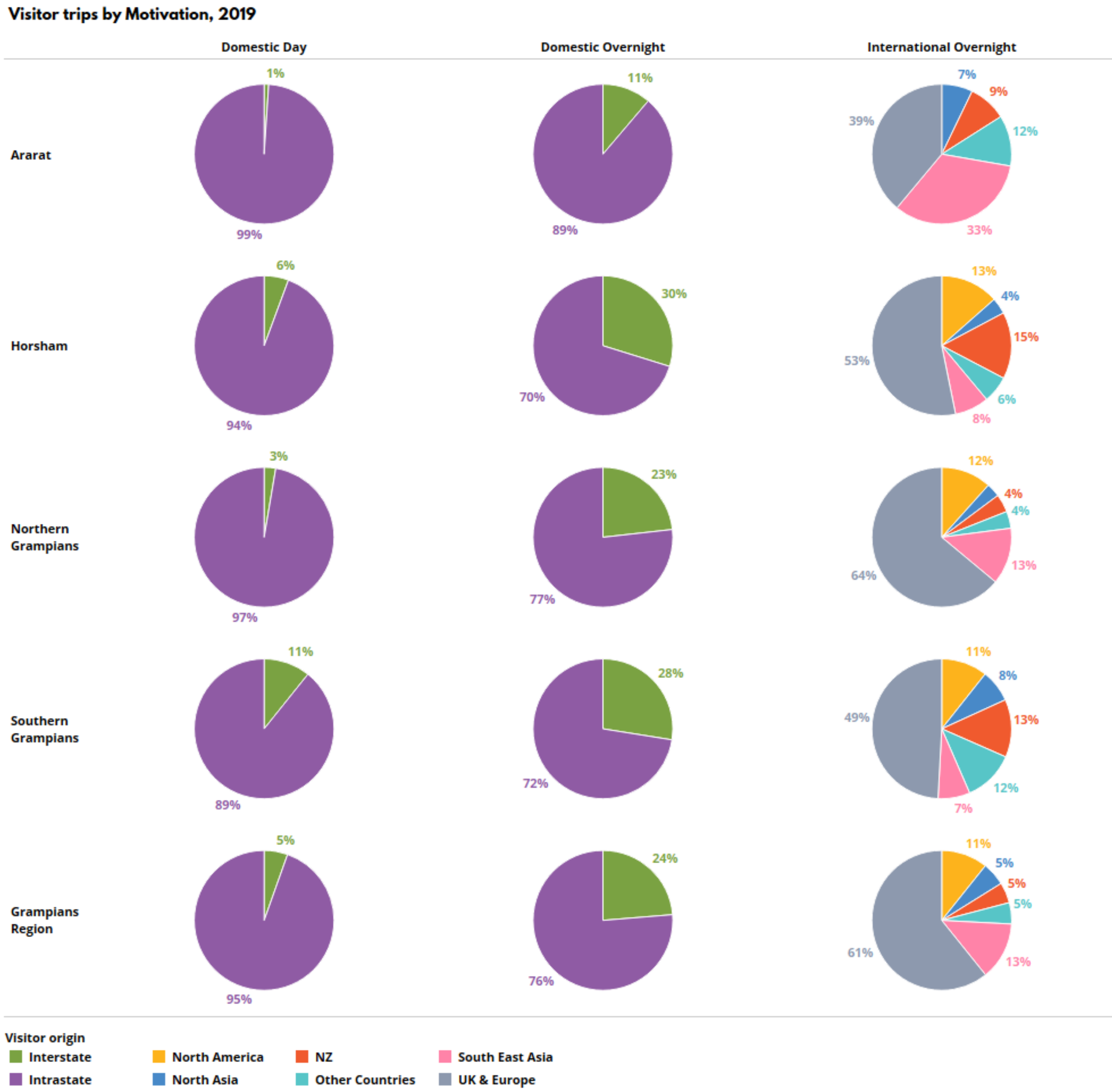
[29] Tourism Research Australia, National and International Visitor Surveys

3.9. Source Markets

Figure 15 illustrates the primary source markets for travellers to each council area. The vast majority of domestic travellers are intrastate visitors. For the domestic day market, 95% of visitors to the Grampians are intrastate travellers, while for the domestic overnight market this figure is 76%. The major intrastate market for the Grampians is regional Victoria.

South Australia represents the largest interstate market to the Grampians, comprising 67% of all interstate domestic travel. This makes sense given the proximity of the region to South Australia. This is important to note for future tourism investment and development, as leisure visitors especially from other states and territories are going to be an important catchment to grow and support new development across the region.

Figure 15: Source Markets, 2019 Sept YE[30]



[30] Tourism Research Australia, National and International Visitor Surveys

4. SUPPLY-SIDE ASSESSMENT

The following section provides a supply-side product assessment for the Grampians. This includes two audits: one focused on the accommodation offering and one on attractions and experiences. The purpose of the audit is twofold: firstly, to ascertain where product gaps may exist in the tourism product mix; and secondly, to complete sentiment analysis on the existing product.

The audit is primarily based on an extensive 'data scraping' exercise that leveraged the following sources: The Australian Tourism Data Warehouse, TripAdvisor, Booking.com, Google Travel and Google Maps.[31] Their collective data offers a robust way of determining both product gaps and visitor sentiment feedback.

Figure 16 provides a summary of the stocktake findings.

Figure 16: Stocktake Summary

37%

Boutique Properties (B&Bs, cottages, farm stays etc.)

Accommodation Property Stock

48%

Motel Properties

Bookable Unit Stock

+43

Positive consumer sentiment regarding accommodation stock

Accommodation Sentiment (NPS)

18% - Waterfalls & Bodies of Water
17% - Natural Locations (National Parks etc.)
16% - Museums & Historic Sites/POIs
11% - Hiking Trails
8% - F&B Experiences

Tourism Product & Experiences

+56

Positive consumer sentiment toward tourism experiences and attractions

Product & Experiences Sentiment (NPS)

Ararat
Dunkeld
Halls Gap
Hamilton
Horsham
St Arnaud
Stawell

Accommodation & Product Hubs

[31] It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online.

4.1. Accommodation Audit

When reviewing the accommodation audit findings, it is important to note that it excludes:

- non-commercial accommodation, such as Airbnbs and holiday home properties (unless these are listed on commercial platforms such as TripAdvisor, Google Travel or Booking.com);
- unofficial camping areas (such as those listed on peer-to-peer sharing sites such as WikiCamps).

4.1.1. A note on Airbnbs

As previously mentioned, Airbnb data was unable to be included in this audit. This is because Airbnb makes it challenging to scrape data from their website. Added to this is the fact that many operators dual list across many booking websites so they may have already been captured in the Google, TripAdvisor and/or Booking.com data scrapes. It is also difficult to determine duplicates as many properties have different names across various websites.

Despite this, the size of the Airbnb offering within the region needs to be considered because it is significant. Based on top-line data available from Airbnb, the following is noted (see Table 5).

- A total of 352 Airbnb listings were identified across Halls Gap, Stawell, Hamilton, Dunkeld, Ararat, Horsham, St Arnaud, and Pomonal.
- The bulk of properties are situated in or close to Halls Gap, comprising 178 (or 51%) of those listed on Airbnb for the area.

While Airbnbs certainly fill a market gap, there are several challenges with having an accommodation mix that is heavily weighted towards these properties. By way of example, if we exclude boutique-style properties [32] from the data scrape completed for Halls Gap accommodation (see Section 4.1.2), 32 commercial accommodation properties and campgrounds were identified. Contrasting this with the Airbnb data for Halls Gap (178 Airbnbs) shows that Halls Gap has an accommodation typology very heavily weighted toward Airbnb. Some challenges associated with this include the following.

- Encouraging investment interest in accommodation can be challenging because occupancy levels at existing commercial properties are lower due to Airbnb soaking up a larger proportion of demand, particularly at peak periods. Airbnbs, in most cases, are excluded from government accommodation occupancy data which typically focuses on commercial properties with more than 15 rooms.
- Worker accommodation is a major challenge in the region and the conversion of housing/residential stock to Airbnb stock is only compounding this issue leading to workforce availability challenges as affordable housing stock is very limited.
- Airbnbs do not provide a regular constant level of bed stock, with some places only being rented out for short periods of the year. This gives a false sense of the size and scale of the region's accommodation stock and can be challenging when trying to secure larger events as capacity can be overstated.

Table 5: Airbnb Listings[33]

Area	Number of Listings	% of Total
Halls Gap	178	51%
Stawell	29	8%
Hamilton	35	10%
Dunkeld	28	8%
Ararat	28	8%
Horsham	22	6%
St Arnaud	9	3%
Pomonal	23	7%
Total	**352**	**100%**

4.1.2. Properties (Spatial Audit)

Figure 17 summarises the findings of the audit undertaken on commercial accommodation properties across the region. The findings demonstrate the following.

- 289 properties were identified throughout the Grampians. These are largely clustered around Halls Gap (72 properties), Horsham (34), Ararat (23), Hamilton (20), Dunkeld (18), Stawell (18) and St Arnaud (8). There are an additional 96 properties located outside of these areas. Figure 18 provides a more detailed overview of accommodation clusters.
- Boutique-style properties (i.e., B&Bs, farm stays, cottages, and guesthouses) comprise the most common property type, making up 37% (106) of all properties identified. This is likely under-representative of the true size of this sector as it excludes Airbnbs who do not dual list on Google Travel, Bookign.com and/or TripAdvisor (see Section 4.1.1).
- After boutique-style properties, campgrounds make up the largest proportion of accommodation (24%, or, 68 campgrounds).
- For Ararat, Dunkeld and Halls Gap, boutique accommodation makes up the largest proportion of accommodation properties, comprising 43%, 50% and 56% of properties, respectively.
- For Horsham, Stawell, and St Arnaud, however, motels make up the largest share of properties, representing 40%, 50% and 75% of properties in each area respectively.
- Hamilton's properties are evenly split between motels and boutique properties, each comprising 40% of properties in the town.

[32] These have been removed purely to try eliminate duplicate listings between Airbnb and the data scrape.

[33] As of 27/04/22

- For properties not situated within the clusters identified, the majority are campgrounds, comprising 64% of properties.

4.1.3. Bookable Room Units[34]

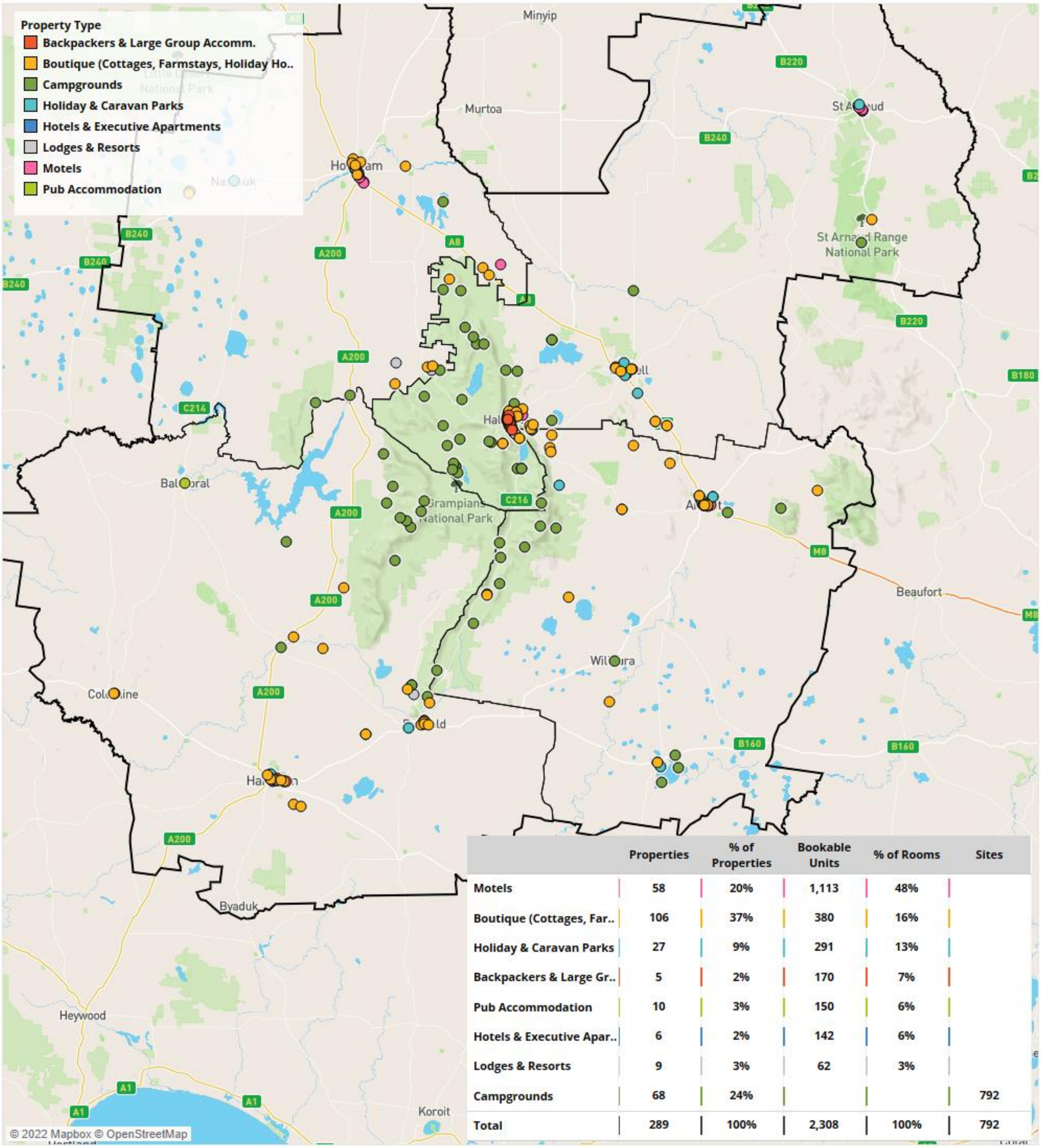
Figure 17 also provides a summary of commercial accommodation bookable room units throughout the region. It is important to note that for holiday parks, bookable room units reflect cabin rooms were included where data was available rather than powered and unpowered sites (powered and unpowered sites for commercial caravan parks were excluded because of a lack of information available).

The data demonstrates the following.

- While motels rank third in terms of the number of properties, they provide just under half of the bookable room units (1,113 bookable room units) throughout the region. Much of the region's motel stock reflects a more traditional tourism accommodation product – it is often dated and the price to value/quality proposition is not consistently being met.
- There is very little hotel and/or serviced apartment bookable unit stock in the region (with these properties making up only 6% of bookable unit stock throughout the region).
- There are very few larger-scale properties in the region with only four properties offering more than 50 rooms (and these are all older-style motel or backpacker properties).
- The region's caravan parks reflect a more traditional transit style property type – there are no examples of higher quality, branded destination holiday parks.
- Halls Gap supplies the most bookable unit stock. Out of the six town clusters identified, it supplies almost 34% of the bookable unit stock. This is followed by Horsham (24%).
- Site numbers for campgrounds have been included where data was available. Of the 70 campsites identified, site numbers were obtained for 32 sites. As many sites are free and not formalised, site counts are not always possible. Based on the audit, the region has 792 paid and free campsites available. This true figure is likely much larger but this still shows the strength of the region regarding this type of accommodation offering. Most of the campsites identified are managed by Parks Victoria.

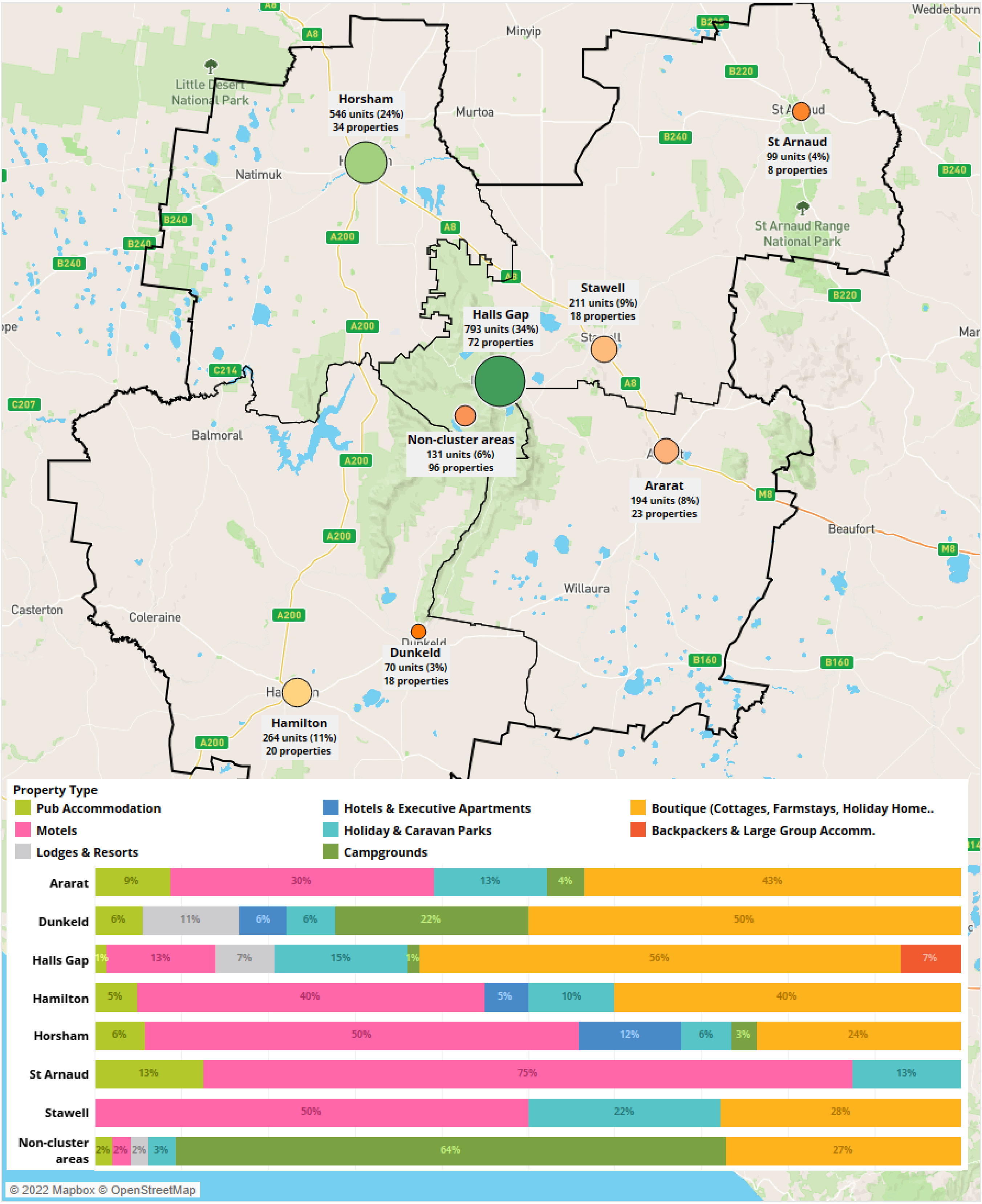
[34] Note, a bookable room unit represents the number of individual rooms/units that can be booked out by separate parties. If, for example, a holiday home has 8 rooms, but these are in the one house and can only be booked by one party, then 1 bookable unit is recorded for this property. A motel property with 12 rooms would be recorded as having 12 bookable units.

Figure 17: Accommodation audit



	Properties	% of Properties	Bookable Units	% of Rooms	Sites
Motels	58	20%	1,113	48%	
Boutique (Cottages, Far..	106	37%	380	16%	
Holiday & Caravan Parks	27	9%	291	13%	
Backpackers & Large Gr..	5	2%	170	7%	
Pub Accommodation	10	3%	150	6%	
Hotels & Executive Apar..	6	2%	142	6%	
Lodges & Resorts	9	3%	62	3%	
Campgrounds	68	24%			792
Total	289	100%	2,308	100%	792

Figure 18: Accommodation clusters



4.1.4. Accommodation Sentiment

To undertake a top-line assessment of the quality of a region's commercial accommodation offering, a Net Promoter Score (NPS) metric has been applied. This is a measurement of consumer assessment and loyalty. In a tourism context, this translates to a visitors' willingness to not only return for another stay but also make a recommendation to their family, friends, and colleagues. NPS scores are reported with a number from -100 to +100, with a score above 0 considered okay, a score above 30 considered good and a score above 50 considered excellent.

The NPS is calculated using a scale (see Figure 19), with:

- a score between 0-6 being considered unhappy customers who are unlikely to return, and may even discourage others from staying with the provider;
- a score between 7-8 being passives, meaning they are satisfied with the provider but not happy enough to be considered promoters; and
- a score between 9-10 are considered promoters who are typically loyal and enthusiastic customers and who are likely to return and strongly promote the provider.

TripAdvisor[35] and Google use a scale of 1-5 for consumer ratings on accommodation products. Converting this to the NPS scale means that a rating of 1-3 are considered "detractors" for the product, a score of 4 are the product's "passives" and a score of 5 are the product's "promoters".[36]

Figure 19: NPS Score Scale

Of the 289 properties identified, NPS ratings were able to be obtained for 199 properties (69%). This is a robust sample size for calculating NPS scores by category. **Only those properties that had 5 or more reviews were included in the analysis.**

Table 6 provides a summary of the NPS results[37] for the Grampians accommodation mix. The findings are as follows.[38]

- The region's commercial accommodation product receives an overall NPS of +43, based on 22,798 reviews. While this falls within the 'good' range for NPS scores, based on Stafford's work completing accommodation audits throughout the country, this is towards the lower end of average NPS ratings.
- The category which receives the highest average NPS score is Lodges & Resorts followed closely by Boutique Properties. Both these categories receive a relatively strong NPS of +59 and +58 respectively, reflecting a higher degree of consumer satisfaction. This is based on 1,245 reviews across 9 properties for Lodges & Resorts and 2,700 reviews across 66 properties for Boutique Properties.
- The next category with the highest NPS are Campgrounds (+49), which interesting places them above Hotel & Executive Apartment properties (+37).
- Motels, which make up the largest proportion of bookable unit stock throughout the region receive a relatively low NPS of +26 (based on 8,731 reviews). This indicates that there may be concerns from consumers regarding the quality and price proposition of motel properties in the region (i.e., the price to value proposition may be out of kilter for some motels).
- Pub accommodation receives the lowest NPS score of +12 based on 1,913 reviews. This is a common finding across most destinations in regional parts of Australia as pub accommodation is often not a focus for property owners, with pubs generating their revenue at the bar or in their restaurants.

Table 6: Accommodation NPS Summary

Property Type	Properties	Reviews	Avg. NPS
Lodges & Resorts	9	1,245	+59
Boutique (Cottages, Farmstays, H..	66	2,700	+58
Campgrounds	27	1,286	+49
Holiday & Caravan Parks	25	5,688	+38
Hotels & Executive Apartments	5	1,016	+37
Backpackers & Large Group Acco..	3	219	+37
Motels	55	8,731	+26
Pub Accommodation	9	1,913	+12
Average	199	22,798	+43

[35] Booking.com has not been used to derive a NPS because it does not provide a scale of scores, but rather, only provides an overall score. Therefore, an NPS is unable to be calculated from Booking.com listings.
[36] https://birdeye.com/blog/net-promoter-score-explained/
[37] It is important to recognise that a high NPS reflects that the quality of product on offer matches the price and consumer expectation. The NPS is calculated based on user-generated ratings on both Google and TripAdvisor for individual businesses. It assesses "promoters" and "detractors" (based on ratings from excellent – poor, or, 1-5) and calculates an NPS.
[38] The data scraping for NPS scores was undertaken in June 2021. The number of reviews therefore is reflective of this period.

Breaking down the NPS by location cluster indicates the following (see Table 7).

- Properties located in Dunkeld receive the highest NPS at +57. This is driven by high NPS scores for Lodges & Resorts, Boutique Properties and Holiday & Caravan Parks.
- The St Arnaud cluster has the lowest average NPS (+16) indicating consumer quality and pricing concerns and an NPS that is well below the regional average. This is driven by a very low NPS score for motel properties.
- While Boutique Properties received a high average NPS (+58) across the region, those situated in Ararat have a lower NPS of +38.

It is important to note, however, that the NPS scores provided are amalgamated average scores: some properties achieve higher NPS' while others achieve lower NPS' resulting in a lower overall average NPS.

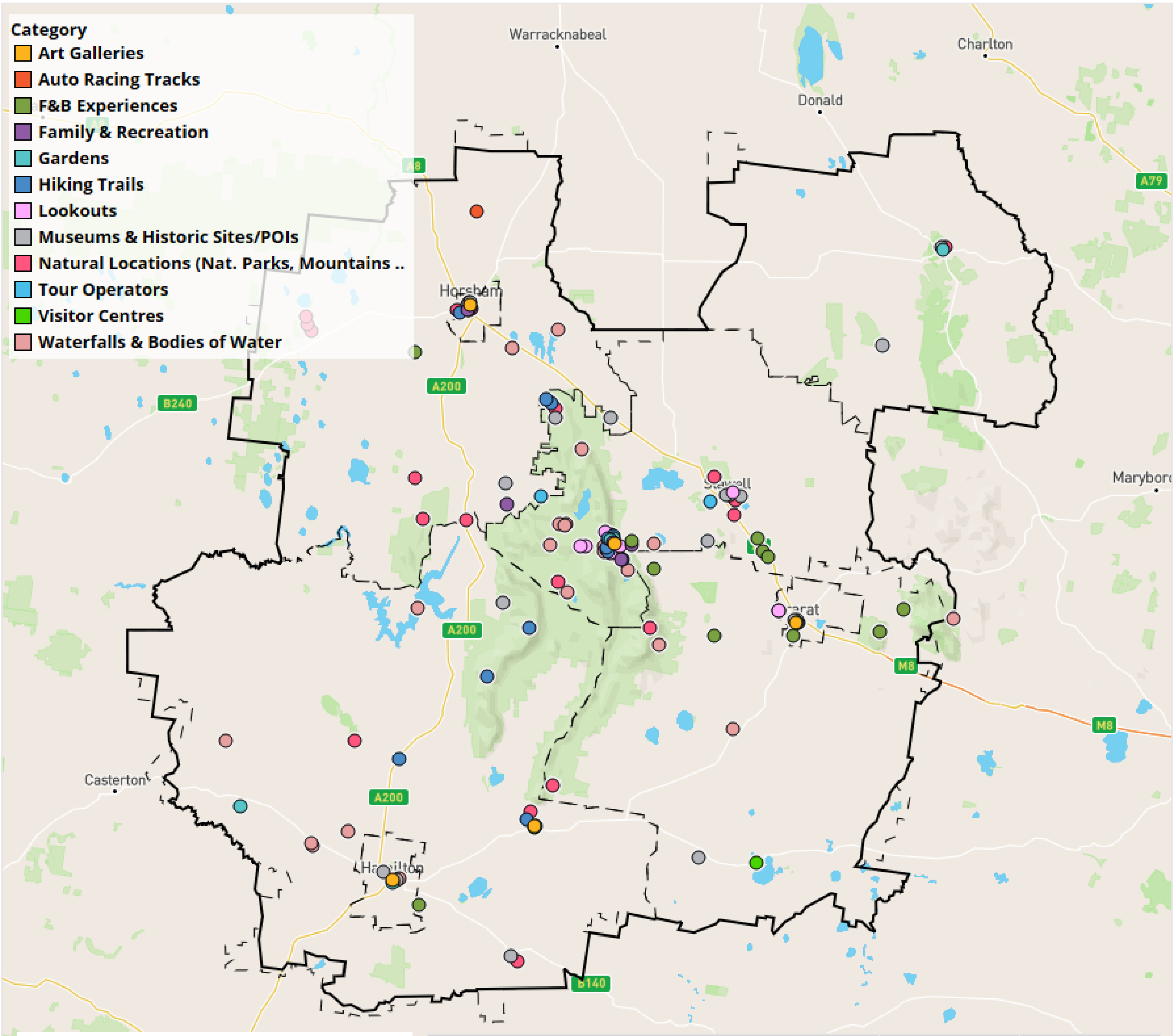
Top-line analysis of visitor comments on accommodation across the region that appear to underpin the lower-than-average NPS score indicates the following.

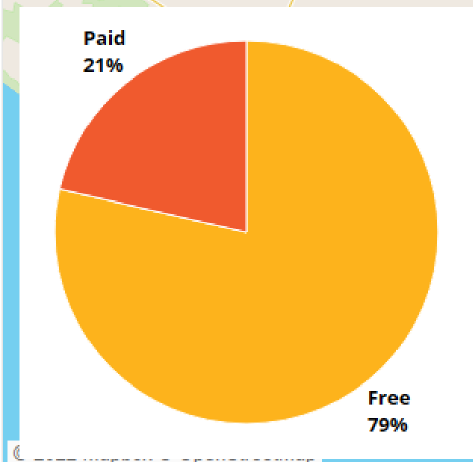
- The dated nature of many properties and the lack of property improvements is often noted.
- The level of cleanliness of some properties is questioned.
- The quality of customer service standards needs to be improved.
- While the great location of many properties is noted, the quality of accommodation is questioned.
  The price being charged by many does not match the quality provided.
- A lack of service provision (often noted as a lack of Wi-Fi) often appears as a complaint.

Table 7: NPS assessment across geographic clusters

Cluster	
Dunkeld	**+57** **9 properties, 1,619 reviews**
Non-cluster areas	**+52** **49 properties, 2,102 reviews**
Halls Gap	**+46** **53 properties, 10,587 reviews**
Hamilton	**+39** **19 properties, 1,683 reviews**
Ararat	**+38** **17 properties, 1,606 reviews**
Horsham	**+34** **30 properties, 3,684 reviews**
Stawell	**+33** **15 properties, 1,172 reviews**
St Arnaud	**+16** **7 properties, 345 reviews**
Total	**+43** **199 properties, 22,798 reviews**

Figure 20: Attractions/experiences audit





Category	Attractions	% of Total Attr..
Waterfalls & Bodies of Water	24	18%
Natural Locations (Nat. Parks, Mountains etc.)	22	17%
Museums & Historic Sites/POIs	21	16%
Hiking Trails	15	11%
F&B Experiences	11	8%
Lookouts	8	6%
Tour Operators	7	5%
Gardens	7	5%
Visitor Centres	5	4%
Family & Recreation	5	4%
Art Galleries	5	4%
Auto Racing Tracks	1	1%
Total	131	100%

4.2. Experience/Attraction Audit

4.2.1. Number of Attractions

Because the tourism sector is so far-reaching, there are many products, experiences and assets which can be considered tourism based. This audit, has, however, focused on those which are considered primary tourism experiences, that is, those which are marketed and positioned as "things to do" when visitors travel to the Grampians. Those products/experiences which are primarily utilised by the local community have, therefore, been excluded.

To be able to derive qualitative and meaningful findings from the product audit, the product has had to be listed within product categories. The attraction type categories are listed below.

Category
- Art Galleries
- Auto Racing Tracks
- F&B Experiences
- Family & Recreation
- Gardens
- Hiking Trails
- Lookouts
- Museums & Historic Sites/POIs (European & First Nations)
- Natural Locations (Nat. Parks, Mountains etc.)
- Tour Operators
- Visitor Centres
- Waterfalls & Bodies of Water

When reading the product audit findings, it is important to note:

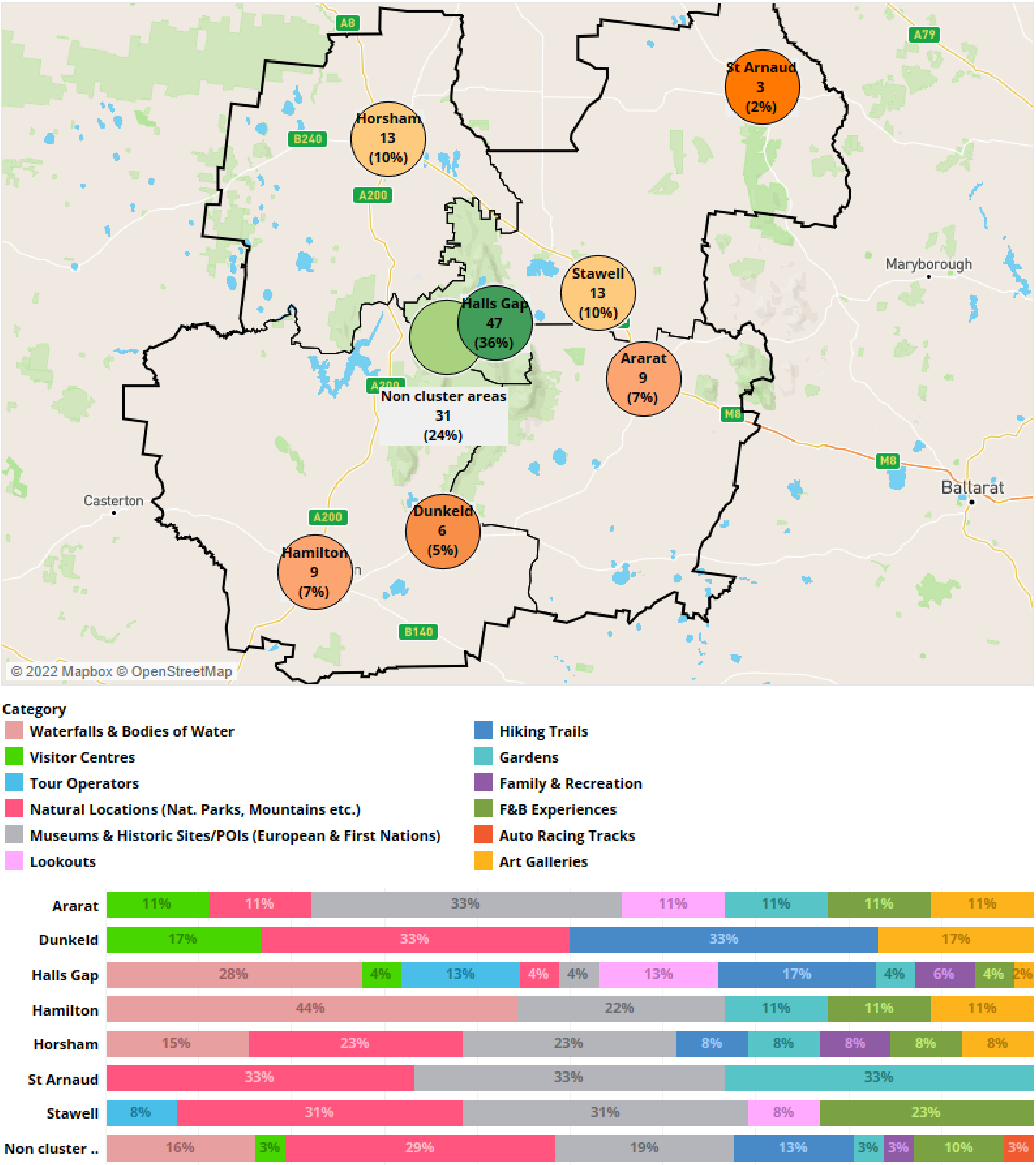
- events have been excluded from the audit;
- general parks have not been included as there are many of these throughout the Grampians that are primarily used by a local market, and which would skew the findings; and
- general food and beverage (cafes, restaurants, bars), rather, the audit only focuses on unique food experiences such as distilleries, food tours etc. (if these are available in the region).

Figure 20 illustrates the findings of the attractions audit and demonstrates the following.

- Based on the audit findings, there are 131 tourist attractions in the region.
- Of these 131 attractions, the most common type is Waterfalls & Bodies of Water (comprising 18% of attractions identified) followed by Natural Locations (17%). This reflects the strong profile the Grampians has as a nature-based destination.
- While product is primarily clustered around the major towns throughout the region, the major cluster is around Halls Gap which acts as the hub for Grampians (Gariwerd) National Park. This area comprises 36% of all products identified.
- A top-line assessment of free versus paid products[39] was undertaken. This demonstrated that an estimated 79% of the region's tourism product is free versus 21% being paid. Although having 'free things to do' in a region is an important part of a region's product mix, greater economic benefit tends to be generated through commissionable tourism experiences. This is because of visitor spending on the product, the ability for wholesalers to package products is greater and the ability to reinvest in the product is greater

[39] We note that the GPT can be undertaken as a free experience, a self-guided but paid experience or as an operator guided experience with higher fees paid. Consumer sentiment illustrates that guided – paid for experiences tend to generate a far higher level of visitor satisfaction than free experiences, generally. At the moment, the region has few paid for experiences and many free experiences.

Figure 21: Geographic product clusters



4.2.2. Experiences/Attractions Sentiment

Of the 131 attractions identified, NPS ratings were able to be obtained for 101 attractions (78%). This is a robust sample size for calculating NPS scores by category. Only products that have five or more reviews have been included in the analysis.

Table 8 provides a summary of the NPS results for the region's attractions mix.

Table 8: Experiences/Attractions NPS Summary

Category	# of Attractions	Total Reviews	Avg. NPS
Tour Operators	2	89	+87
Family & Recreation	3	1,786	+75
F&B Experiences	10	529	+69
Lookouts	8	4,334	+65
Hiking Trails	12	1,864	+58
Art Galleries	5	115	+58
Natural Locations (Nat. Parks, Mountains etc.)	15	3,572	+56
Museums & Historic Sites/POIs (European & First Nations)	18	750	+55
Visitor Centres	5	1,069	+47
Gardens	6	363	+43
Waterfalls & Bodies of Water	17	1,643	+43
Total	101	16,114	+56

The findings are as follows.[40]

- The Grampian's experiences/attractions product receives an overall NPS of +56, based on 16,114 reviews. This is a good NPS rating and rates well above the accommodation NPS achieved (+43).
- The product category which receives the highest average NPS score is 'Tour Operators", with a very high NPS of +87. This is based on 89 reviews across 2 different operators.
- The product category with the lowest average NPS is 'Waterfalls & Bodies of Water.' However, the score (+43) is still in the range of a good NPS.
- Paid product has a higher average NPS (+74) than free product (+52) reflecting consumer willingness to pay for product that is of a high enough quality/standard.

The NPS scores have also been broken down by geographic cluster (see Table 9) and demonstrate that the lowest average NPS score was identified for the Stawell cluster (+47) while the highest overall NPS score identified was for Ararat (+64)

Table 9: Experiences/Attractions NPS by geographic cluster

Clusters	
Ararat	+64 8 products, 607 reviews
Dunkeld	+61 6 products, 219 reviews
Non cluster areas	+58 19 products, 339 reviews
Halls Gap	+57 37 products, 13,459 reviews
Hamilton	+54 8 products, 405 reviews
St Arnaud	+51 3 products, 35 reviews
Horsham	+49 9 products, 216 reviews
Stawell	+47 11 products, 834 reviews
Total	+56 101 products, 16,114 reviews

40 The data scraping for NPS scores was undertaken in June 2021. The number of reviews therefore is reflective of this period. It excludes any product with less than 5 reviews.

4.3. F&B Audit

Sentiment assessment on the region's food offering has also been undertaken. A full comprehensive audit of the sector is problematic because of the number of F&B providers who are not listed online. The sentiment assessment, however, does provide a top-line perspective on the F&B offering in the region and consumer satisfaction regarding this. This audit is based only on TripAdvisor F&B listings for the region and only includes those listings with five or more reviews.

Table 10 and Table 11 demonstrate the following.

- The region's F&B offering achieves a lower-than-average NPS rating of +22. This is based on 14,365 reviews across 172 different operators.
- Dessert bars received the highest NPS +66. While this is based on only two operators, the number of reviews reflects a good sample size (487).
- The lowest NPS score was received for bakeries (+13), based on eight operators and 565 reviews (which again, reflects a good sample size).
- General cafés and restaurants also receive a low NPS of +19 based on 115 providers and 9,354 reviews.
- Those F&B providers (22 in total) situated in areas throughout the region that are not main town locations achieve the highest average NPS of +36 (based on 601 reviews). This is followed by Dunkeld (+31) and Halls Gap (+30).
- Ararat and Horsham, on the other hand, receive the lowest average NPS of +10 and +17 respectively.

The F&B sector is increasingly competitive. Many destinations across Victoria and throughout the country are seeking to grow their share of the food tourism market. Visitor expectations of F&B are also increasingly growing, spurred on by a strong interest in how food is produced, where it comes from and how the visitor can immerse themselves in the culture of a destination, through F&B experiences.

With the array of produce and wine produced in the region, there is a good opportunity for the Grampians to leverage this and lift the standard of F&B provision. This does not just relate to the quality and diversity of options but also relates to customer service standards and operational hours.

Table 10: F&B NPS Summary by type

	Number	Total Revs	Avg. NPS
Dessert	2	487	66
Indian	4	1,043	42
Fast food	6	116	39
Italian & Mediterranean	8	645	32
Pizza	4	82	27
Bar	11	1,246	24
Asian	14	827	23
General Cafe/Restaurant	115	9,354	19
Bakeries	8	565	13
Grand Total	172	14,365	22

Table 11: F&B NPS Summary by cluster

Cluster	Number	Total Revs	Avg. NPS
Non-cluster areas	22	601	36
Dunkeld	6	896	31
Halls Gap	21	6,303	30
Stawell	23	872	24
St Arnaud	8	136	20
Hamilton	25	1,245	20
Horsham	43	3,077	17
Ararat	24	1,235	10
Total	172	14,365	22

4.4. Gap Analysis

4.4.1. Accommodation

As we undertake our site analysis and further research, we will identify product gaps for accommodation and opportunities for filling these in various locations. This section will be completed as Stage 2 of this exercise. Figure 22, however, provides an interim assessment of accommodation gaps throughout the region.

The consumer sentiment assessment indicates that there is lower than average consumer satisfaction across commercial accommodation stock in the Grampians. There is likely a need for:

- new, higher-quality properties to offer alternative forms of accommodation to encourage visitation by different visitor markets, especially higher value visitors; and/or
- existing operators need to enhance the quality of their products and/or realign prices to better match consumer expectations and what the market sees as fair value.

Most room stock is supplied through motels, most of which are older style. While this type of accommodation does support visitation to the region by some visitor markets, for the region to attract a higher-yielding visitor market will necessitate new forms of accommodation being introduced, including hotel-style properties (including branded and 3.5-4.5 star properties), serviced apartment properties (to support business travellers and those staying in the region for longer periods than the traditional leisure market) and higher-end lodges/resort properties that complement the quality natural environment to attract a higher-yielding market. This could also include retrofitting and upgrading existing accommodation stock to convert them to eco-style, including eco-hotels, -lodges, -cabins and -chalets.

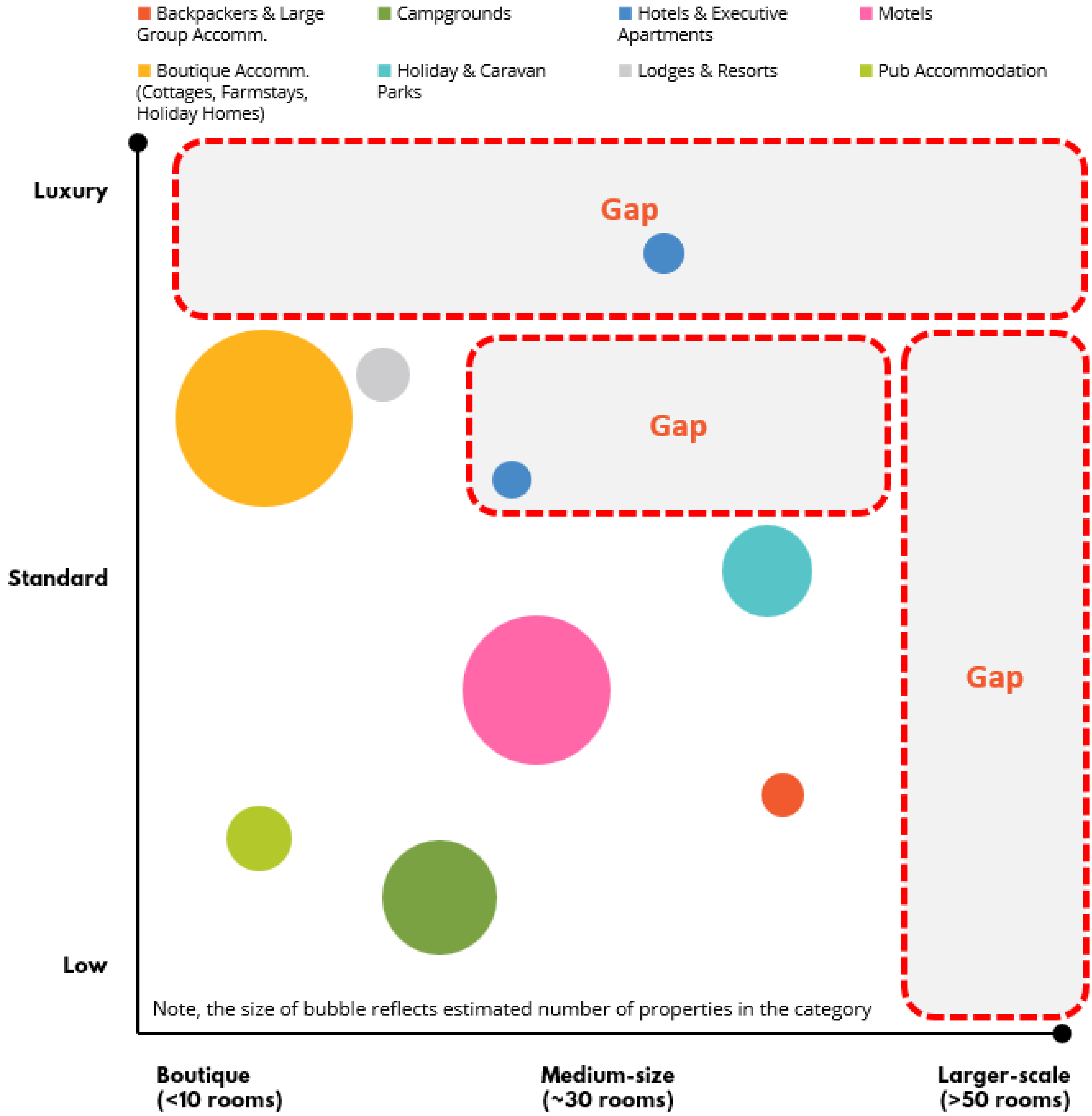
There are a number of Airbnb properties throughout the region. Based on anecdotal feedback, it is estimated that approximately 40% of the region's total accommodation stock comprises Airbnb properties. **While we are not discounting the importance of these properties, they tend not to provide a consistent supply of accommodation (some are only available for certain parts of the year) and the ability for food and safety standards to be regulated is challenging.**

Further challenges generated by Airbnb properties include the lack of employment they create for the tourism and hospitality sector, the impact they have on soaking up market demand which often makes the feasibility of new hotels, lodges etc far more difficult to achieve, and the limited broader economic benefits they achieve including their inability to leverage new tourism-related investment.

Most properties are older-style accommodation properties. There are few larger scale, branded properties. Having a larger proportion of branded properties in a region's accommodation portfolio is advantageous for several reasons, including:

- the significant marketing databases they bring which help promote not only their properties but also the regions in which they are located;
- they strongly support overnight visitation to the region;
- they often are strong supporters of local and regional events and festivals etc.; and
- they often act as catalysts for other accommodation properties to help raise their quality standards.

Figure 22: The Grampians accommodation gap analysis



4.4.2. Attractions

As we undertake our site analysis and further research, we will identify product gaps for attractions and experiences and opportunities for filling these in various locations. for filling these in various locations. This will be completed as Stage 2 of this exercise. Unlike commercial accommodation, which is only paid accommodation overnight, the attractions gap analysis is likely to include a mix of free and paid experiences, as some will be privately developed, and others will be via State (and/or Commonwealth) Government agencies and possibly councils as well.

This category is also quite broad and will include food and beverage outlets and tour operations which are all paid experiences/service providers.

From the audit, it is clear that there is currently limited:

- All-weather experiences for visitors to undertake during times of inclement weather (too cold, too hot, or during periods of excessive wet weather). Some examples of these all-weather experiences include FlyOver Canada, Vancouver, Canada; iFLY (various locations throughout Australia and internationally), It Adventure Ropes Course (indoor), New Haven, USA; Swingers Indoor Golf, London; and the Please Touch Museum, Philadelphia, USA.
- Family-friendly experiences for both visitors and locals alike to undertake.
- Paid tourism products to grow the contribution from tourism to the visitor economy.
- Product that is not primarily focused on nature or history.
- Food and farm-based tourism product which leverages the agricultural sector in the region.

Figure 23: The Grampians attraction/experiences gap analysis

5. BARRIERS TO VISITOR ECONOMY GROWTH

Several factors are limiting the growth potential of the region's visitor economy. Some of these are specific to individual towns/areas while others are region-wide challenges. These are not noted as criticisms, many other destinations have the same challenges, but rather, have been identified so that the identification of tourism investment opportunities can be well focused.

These barriers have been aligned with the destination management components of product development, infrastructure, sustainability, and marketing & promotion, and are not in any priority order.

Table 12: Barriers to visitor economy growth

Barrier	Area	PRODUCT DEVELOPMENT	INFRA-STRUCTURE	SUSTAINABILITY	MARKETING & PROMOTION
A significant amount of national park estate limits some tourism product development	Northern Grampians (GNP)	●	●	●	
Ageing population base & declining population in some areas	Regional		●	●	
Digital literacy of operators	Regional				●
Differing product base not always aligning with broader regional tourism branding/messaging	Southern Grampians and Horsham are less aligned to the national park focus				●
Limited brand awareness outside of regional Victoria	Regional	●			●
Limited transport operators to provide services for the GPT	Northern Grampians, Southern Grampians		●		
Quality and value proposition of accommodation supply	Regional	●	●		
Operating hours of F&B operators (with many closed Monday and Tuesday)	Regional	●			●
Consistency in quality of F&B	Regional	●			
Lack of public transport	Regional		●	●	
Housing availability and affordability challenges impacting tourism workforce supply	Regional	●	●	●	
Limited all-weather paid visitor experiences for visitors and locals during inclement weather	Regional	●			
Many vineyards and producers do not have consumer-facing product	Regional	●			
Limited evening activities to grow overnight visitation	Regional	●			●
Limited indigenous tourism products and presence in the tourism sector	Regional but particularly Northern Grampians (and GNP)	●			
Limited pool of skilled and semi-skilled staff and ability to attract and retain	Regional	●		●	●
Limited well-capitalised investors/developers in the region	Regional	●	●		
Limited worker (both tourism and general worker) accommodation	Regional	●		●	
Mismatch between the quality of facilities/infra/experiences and the desire for higher-yielding visitors in some areas	Northern Grampians	●	●	●	
Small population base unable to sustain many amenities and services	St Arnaud	●	●	●	
Ongoing uncertainty created by COVID-19 and potential new outbreaks	Regional			●	
Challenges with planning approvals, particularly appropriate zoning, and bushfire overlays to activate tourism development opportunities	Northern Grampians, Horsham, Southern Grampians	●			
Council's ability to leverage growing investor interest in a timely way	Regional	●			
The ability of Parks Victoria to deliver dual regulatory/commercial outcomes (as long as they are resourced appropriately)	Northern Grampians	●	●	●	
Lack of resources in Traditional Owner corporations	Regional	●			


BRAMBUK
The National Park
& Cultural Centre

6. VISION & GOALS

6.1. Vision

"The Grampians will continue to attract tourism investment in new and existing ventures, building on its reputation as an outstanding nature-based destination which ultimately facilitates stronger visitor dwell time and spending to grow the benefits generated through the visitor economy."

6.2. Goals

	Goal	Indicator
1.	Increase investment in tourism-based projects in the Grampians	■ Tourism investment in the region grows. ■ Reinvestment into existing products occurs (with the aim of refreshing current experiences and enhancing/expanding the offering). ■ The number of tourism-based products and experiences grows. ■ Visitor and resident satisfaction grow, measured via an annual survey. ■ Regional tourism indicators increase. ■ More locals participate in in-region tourism-based experiences. ■ Profile and awareness of the Grampians region as a destination grows.
2.	Grow tourism's contribution to the Grampians to ensure a thriving local economy and improved social wellbeing.	■ Regional tourism GDP increases, and tourism job opportunities grow. ■ Visitor yield, measured via average spend, increases. ■ The number of tourism-based products and experiences grows. ■ New tourism products are potentially featured by Visit Victoria. ■ The value of tourism to the region is expressed in positive local attitudes to continue to offer a social license for supporting the visitor economy.
3.	Ensure genuine partnership engagement occurs with Traditional Owners (TOs) to develop the region's visitor economy.	■ The number of tourism initiatives by TOs in the region grows. ■ TOs express their support for tourism and the opportunities it is seen to bring.
4.	Ensure tourism development and growth sustains and enhances the Grampians' natural and built environment for the benefit of residents first and foremost, and then its visitors.	■ New and/or improved amenities and infrastructure are introduced (cycleways, walking tracks, public toilets, rubbish facilities and interpretive and directional signage). ■ Progress towards Net Zero Emissions by 2050 goal is made. ■ Participation in regenerative tourism opportunities grows.
5.	Foster strong partnerships between private and public sector investment partners.	■ The number of active PPP projects in the region grows ■ Private sector confidence in the region increases

7. THE OPPORTUNITIES

7.1. The Opportunities Identified

In total, **89** opportunities have been identified with the help of councils, industry, and state government. They are tourism-focused and categorised as:

- accommodation opportunities;
- attraction/experience-based opportunities;
- event opportunities;
- infrastructure opportunities;
- marketing opportunities
- training opportunities; or
- tourism transport opportunities.

Opportunities have also been segmented to whether they are:

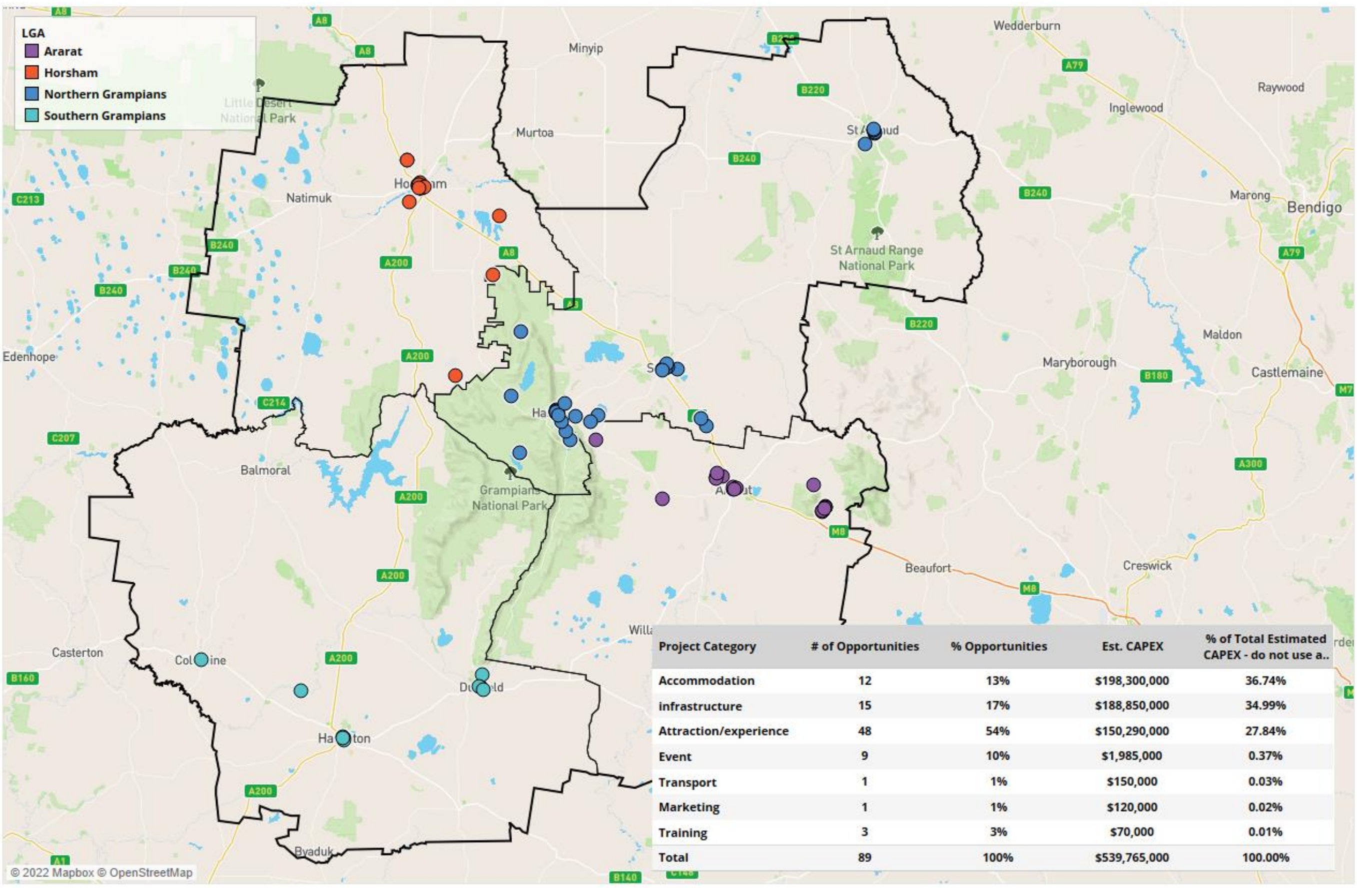
- private investment drivers;
- public investment opportunities that are likely to facilitate private investment (i.e., public enablers for private investment); or
- public investment opportunities in infrastructure, events, and programs.

Many of the opportunities identified are supply-led and are aimed at introducing more commissionable products and private investment into the region's tourism offering. This is because the ultimate outcome of this project is an investment prospectus geared to stimulate private investment to build a far stronger visitor economy and to specifically generate more local visitor economy jobs. However, the public investment opportunities identified have also been outlined in this Plan as they are still very important, particularly as many are likely to act as catalysts to stimulate private investment.

Figure 24 provides a summary of all the opportunities identified and shows that the opportunities are dispersed throughout the Grampians region rather than being concentrated around existing destination hubs.

The full list of opportunities is included in Section 7.2.

Figure 24: Spatial overview of opportunities



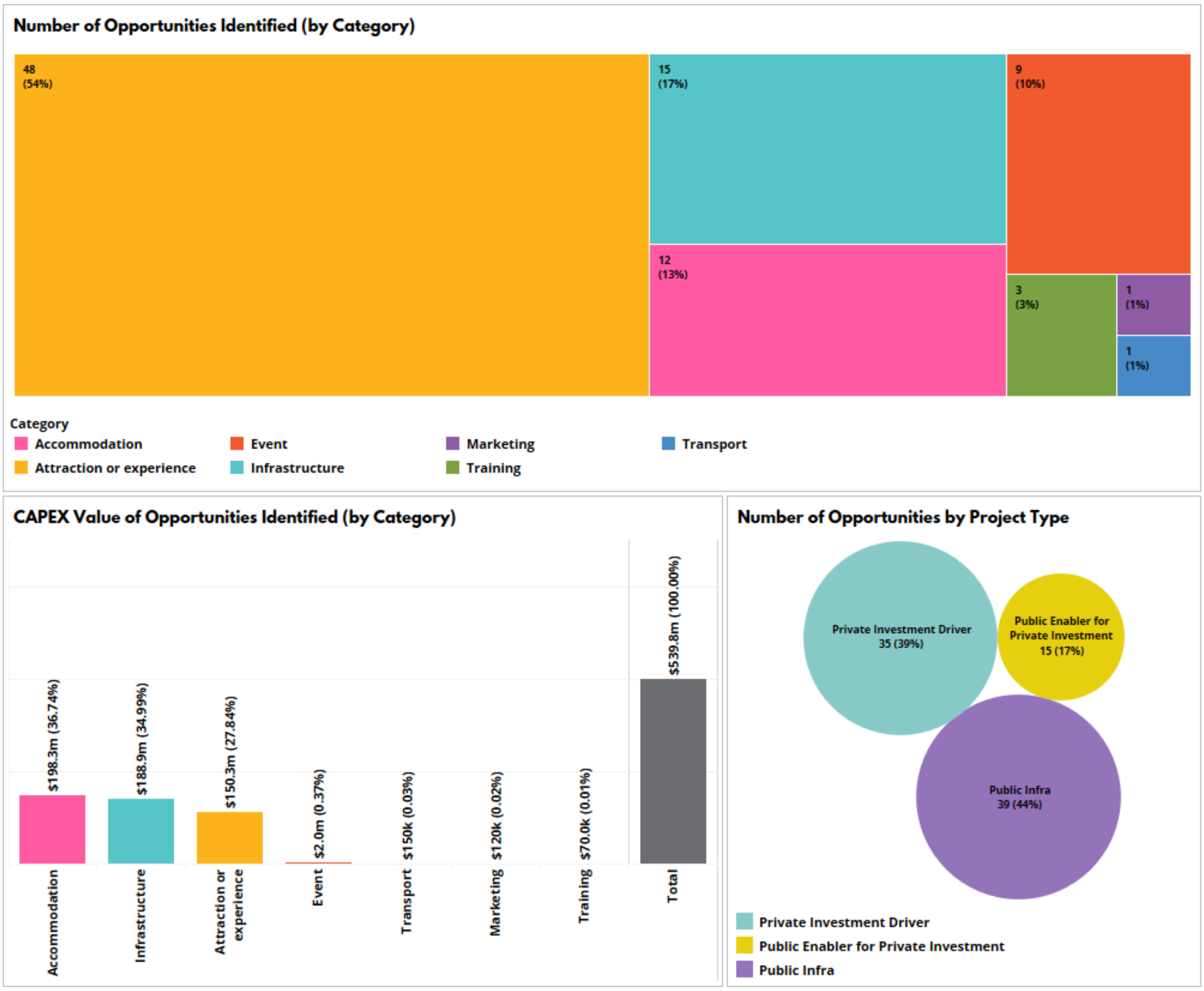
Project Category	# of Opportunities	% Opportunities	Est. CAPEX	% of Total Estimated CAPEX - do not use a..
Accommodation	12	13%	$198,300,000	36.74%
infrastructure	15	17%	$188,850,000	34.99%
Attraction/experience	48	54%	$150,290,000	27.84%
Event	9	10%	$1,985,000	0.37%
Transport	1	1%	$150,000	0.03%
Marketing	1	1%	$120,000	0.02%
Training	3	3%	$70,000	0.01%
Total	89	100%	$539,765,000	100.00%

Figure 25 provides a summary of the opportunities identified. Observations are as follows.

- Over half (54%) of the opportunities identified are attraction or experience investment opportunities, followed by infrastructure projects (17%) and accommodation investment opportunities (13%).
- In total, an estimated $540 million may be required to activate all 89 opportunities. The greatest level of investment is identified accommodation-related opportunities (comprising 37% of all investment identified or $198 million), followed by infrastructure, comprising (35% or $189 million).
- Of the 89 opportunities identified, 44% (39 opportunities) are public infrastructure opportunities, 39% (35) are private investment drivers and a further 17% (15) are public enablers for private investment.

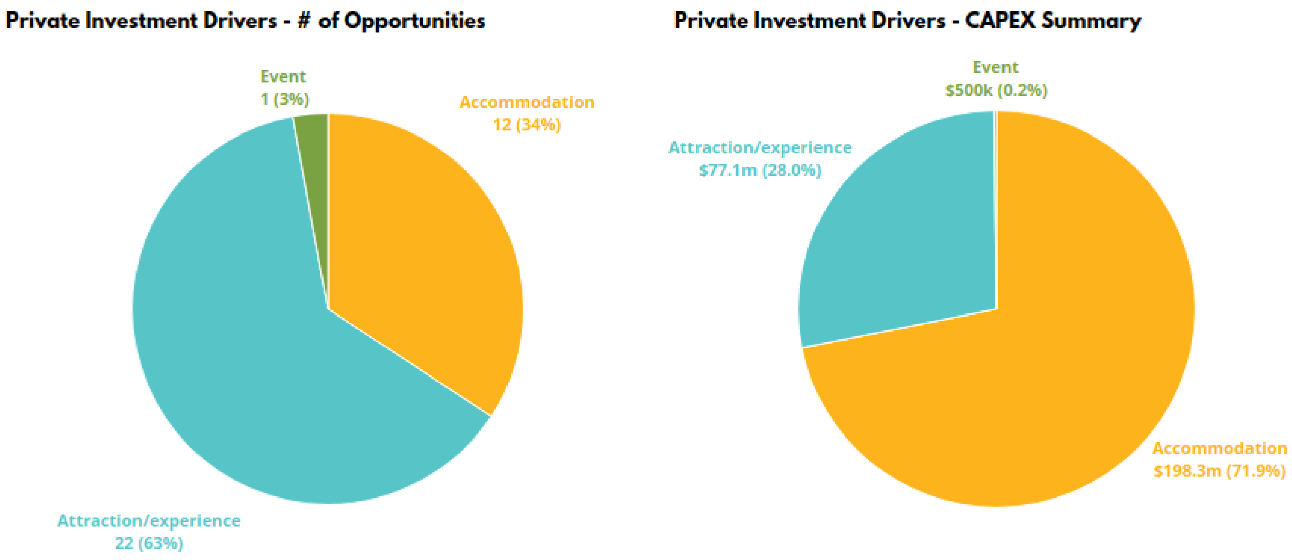
Capex estimates are provided as estimates/guides only and exclude provision for contingencies (design development and escalation), consultant fees (legal, financial, engineering, architectural), government charges and builder's margins.

Figure 25: Summary of the opportunities identified



Narrowing in on the 35 private investment drivers shows that investment into new and existing attractions or experiences comprises the most opportunities identified, representing 22 of the 39 opportunities. While accommodation opportunities do not represent the most opportunities, they are likely to require the most investment, accounting for just under 72% of the investment required for private investment drivers (totalling $198 million).

Figure 26: Summary of the private investment driver opportunities identified



7.2. The Full List of Opportunities

7.2.1. Private investment drivers

Table 13 lists the 35 private investment driver opportunities. Of these, 22 are attraction/experience opportunities, 12 are accommodation opportunities and one is an event opportunity. The total estimated CAPEX for these projects is $276 million which comprises $236 million in private investment and $40 million in supporting public investment.

Table 13: Full list of private investment driver opportunities

Project Category	Project Name	Area	Est. CAPEX	Est. Private	Est. Public
Accommodation	3.5-star branded business/leisure hotel	Ararat	$45,000,000	$40,500,000	$4,500,000
	4-star hotel/resort with F&B at Halls Gap	Northern Grampians	$45,000,000	$40,500,000	$4,500,000
	Destination holiday park	Horsham	$18,000,000	$16,200,000	$1,800,000
	Dunkeld luxury units	Southern Grampians	$7,000,000	$7,000,000	$0
	Farm stay accommodation	Regional	$1,000,000	$1,000,000	$0
	Glamping pods	Ararat	$6,500,000	$5,850,000	$650,000
	Heritage accommodation in Horsham	Horsham	$5,000,000	$4,500,000	$500,000
	Heritage accommodation in St Arnaud	Northern Grampians	$5,000,000	$4,500,000	$500,000
	High-end eco-lodge	Ararat	$35,000,000	$31,500,000	$3,500,000
	Motel retrofitting (4-8 properties)	Northern Grampians	$800,000	$760,000	$40,000
	Mount Zero resort (Stage 1)	Horsham	$15,000,000	$14,250,000	$750,000
	Off-park lodge sites to link into the GPT	Southern Grampians	$15,000,000	$14,250,000	$750,000
Attraction/experience	4WD adventure tours	Northern Grampians, ..	$65,000	$58,500	$6,500
	Activation of waterways (kayaking, paddle boarding)	Horsham	$35,000	$35,000	$0
	Agridome style attraction (with a sheep focus)	Southern Grampians	$12,000,000	$6,000,000	$6,000,000
	Airport site redevelopment (with tourism offering)	Horsham, Stawell	$5,000,000	$2,500,000	$2,500,000
	Dunkeld geothermal spa experience	Southern Grampians	$7,500,000	$7,500,000	$0
	Equine trails with tours	Horsham	$100,000	$90,000	$10,000
	Garden tours (public and private gardens)	Southern Grampians	$50,000	$45,000	$5,000
	Gin/vodka/tequila distillery	Ararat	$6,000,000	$6,000,000	$0
	Grampians food & wine packages	Regional	$50,000	$45,000	$5,000
	Grampians Wine Cellars enhancements	Northern Grampians	$155,000	$139,500	$15,500
	Grampians wine discovery centre	Regional	$18,000,000	$9,000,000	$9,000,000
	Indoor, all-weather activity centre (rock climbing/boulderi..	Northern Grampians	$8,000,000	$5,200,000	$2,800,000
	Inland aquarium attraction	Horsham	$2,500,000	$2,250,000	$250,000
	J Ward commercial ghost tours	Ararat	$100,000	$90,000	$10,000
	Orchid tours, orchid house and spring flower tours	Horsham	$500,000	$75,000	$425,000
	Outdoor adventure hub (high rope aerial course, flying fox)	Northern Grampians	$1,000,000	$900,000	$100,000
	Pop-up café and water sport hire	Ararat	$120,000	$108,000	$12,000
	Recreational fishing and competition	Horsham	$65,000	$58,500	$6,500
	Restaurant & function centre on river-edge	Horsham	$8,000,000	$7,200,000	$800,000
	Tourism aviation activity (scenic flights, gliding, pax service..	Horsham	$1,400,000	$1,260,000	$140,000
	Updated entrance way & admin building for Halls Gap Zoo	Ararat	$1,500,000	$1,350,000	$150,000
	Waterway electric house boats	Northern Grampians	$5,000,000	$4,500,000	$500,000
Event	Major car club events (classic, vintage, veteran)	Northern Grampians	$500,000	$450,000	$50,000
Total			$275,940,000	$235,664,500	$40,275,500

7.2.2. Public enablers for private investment

Table 14 shows the 15 publicly funded enablers for private investment opportunities. Of these, 7 are infrastructure projects and 4 are attraction/experience opportunities. There is also one event, one marketing, one training and one transport opportunity. The total estimated CAPEX for these projects is $146 million which comprises just over $3.1 million in private investment (where a public-private investment partnership is required) and $143 million in public investment on its own.

Table 14: Full list of public enablers for private investment opportunities

Project Category	Project Name	Area	Est. CAPEX	Est. Private	Est. Public
Attraction/experience	A wildlife habitat & cultural education center	Ararat	$18,000,000	$2,700,000	$15,300,000
	Brambuk upgrade	Northern Grampians	$7,000,000	$0	$7,000,000
	GPT staged trek separation (2-3 night blocks)	Northern Grampians	$1,000,000	$0	$1,000,000
	Implementation of Volcanic Trail Masterplan	Southern Grampians	$9,250,000	$0	$9,250,000
Event	Activation of city to river front masterplan with event	Horsham	$200,000	$30,000	$170,000
infrastructure	Dunkeld visitor hub	Southern Grampians	$1,500,000	$375,000	$1,125,000
	Halls Gap wayfinding	Northern Grampians	$250,000	$0	$250,000
	Lake Bellfield improvement	Northern Grampians	$5,000,000	$0	$5,000,000
	Lookout/viewing area development and upgrades	Regional	$2,000,000	$0	$2,000,000
	Mobile and digital connectivity improvements	Regional	$1,000,000	$0	$1,000,000
	Roading upgrades	Regional	$100,000,000	$0	$100,000,000
	Signage audit & upgrades (directional & interpretive)	Regional	$100,000	$0	$100,000
Marketing	Destination branding	Regional	$120,000	$0	$120,000
Training	F&B upskilling and training programme	Regional	$40,000	$4,000	$36,000
Transport	Peak season public transport for tourists	Horsham	$150,000	$0	$150,000
Total			$145,610,000	$3,109,000	$142,501,000

7.2.3. Public investment opportunities in infrastructure, events, and programs

Table 15 shows the 39 public investment opportunities in infrastructure, events, and programs. Of these, 22 are attraction/experience opportunities, 8 are infrastructure projects, 7 are events and 2 are training programs/investments.

The total estimated CAPEX for these projects is $118 million which comprises $4.5 million in private investment (via public-private partnerships) and just under $114 million in public investment.

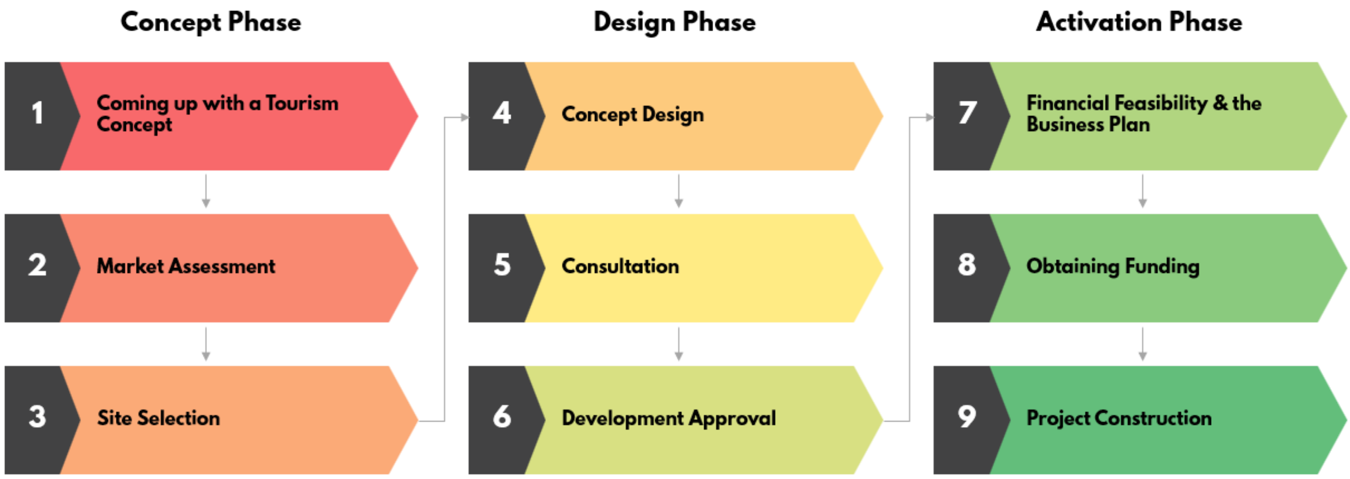
Table 15: Full list of public investment opportunities in infrastructure, events, and programs

Project Category	Project Name	Area	Est. CAPEX	Est. Private	Est. Public
Attraction/experience	Additional child-friendly infrastructure (family market)	Horsham	$500,000	$0	$500,000
	Annual sound and light show with story telling	Northern Grampians	$350,000	$70,000	$280,000
	Ararat Trails Mountain Bike Park	Ararat	$2,200,000	$0	$2,200,000
	Development of multi-use trails	Southern Grampians	$5,200,000	$0	$5,200,000
	Enhanced facilities & shuttle bus service into Mackenzie Fa..	Northern Grampians	$250,000	$0	$250,000
	Extreme sports skills development & training facility	Northern Grampians	$4,500,000	$675,000	$3,825,000
	Grampians tasting trail	Ararat	$100,000	$0	$100,000
	Great Trail development	Northern Grampians	$500,000	$0	$500,000
	Great Western Wine Cycle Trail	Northern Grampians	$200,000	$0	$200,000
	Halls Gap walking loop	Northern Grampians	$500,000	$0	$500,000
	Hamilton Botanic Garden playspace	Southern Grampians	$1,500,000	$0	$1,500,000
	Horsham public art and indigenous interpretation	Horsham	$400,000	$0	$400,000
	Napier Street retail facade upgrades	Northern Grampians	$500,000	$50,000	$450,000
	New Hamilton Art Gallery project	Southern Grampians	$4,000,000	$0	$4,000,000
	Queen Mary Botanic Gardens heritage precinct	Northern Grampians	$500,000	$0	$500,000
	Solar car events	Northern Grampians	$200,000	$0	$200,000
	St Arnaud Mural Trail at the Raillery Hub	Northern Grampians	$250,000	$0	$250,000
	Stawell Underground Physics Laboratory Stage 2	Northern Grampians	$6,500,000	$0	$6,500,000
	Telling the story of gold fields, linking with the current gold..	Northern Grampians	$6,500,000	$3,575,000	$2,925,000
	Visitor dispersal strategy throughout GNP	Northern Grampians	$250,000	$0	$250,000
	Wimmera River Discovery Trail Stage 2 (Horhsam to Dimbo..	Horsham	$2,000,000	$0	$2,000,000
	Wimmera River precinct water play area	Horsham	$1,000,000	$0	$1,000,000
Event	Ararat Dirt Mtn Bike 12 Hr Race	Ararat	$200,000	$0	$200,000
	Car and motor bike hill climb (enhancement of existing eve..	Ararat	$250,000	$125,000	$125,000
	Grampians Tourism Region Road Cycling Granfondo Event	Northern Grampians, A..	$200,000	$0	$200,000
	Grampians triathlon event	Northern Grampians	$200,000	$0	$200,000
	Major regional sports carnival event (netball)	Northern Grampians	$140,000	$0	$140,000
	New Grampians destination food event	Southern Grampians	$200,000	$0	$200,000
	Stawell Gift Race enhancements (e.g. woman's event)	Northern Grampians	$95,000	$0	$95,000
infrastructure	Halls Gap southern gateway	Northern Grampians	$15,000,000	$0	$15,000,000
	Heath Street upgrades & bridge	Northern Grampians	$25,000,000	$0	$25,000,000
	Improved walkability	Northern Grampians	$500,000	$0	$500,000
	Landscaping & general urban enhancements	Regional	$5,000,000	$0	$5,000,000
	Outdoor multi-purpose sports precinct	Horsham	$15,000,000	$0	$15,000,000
	Public toilet upgrades and enhancements	Regional	$2,000,000	$0	$2,000,000
	Regional indoor sports precinct	Horsham	$15,000,000	$0	$15,000,000
	Sawyer Park soundshell upgrade	Horsham	$1,500,000	$0	$1,500,000
Training	F&B and tourism operator ATDW awareness program & digi..	Regional	$20,000	$2,000	$18,000
	F&B roster development	Regional	$10,000	$1,000	$9,000
Total			$118,215,000	$4,498,000	$113,717,000

7.3. Project Development Lifecycle

Victoria's Tourism Investment Guidelines, though developed in 2008, provide a useful project process summary. The stages in the process are outlined in Figure 27.

Figure 27: Project development process lifecycle[41]



Each project identified in this Plan has been allocated to its appropriate stage with respect to where the project currently is at and what are the next steps. Importantly, because work has been undertaken by different parties (and not Stafford) on some projects, steps may not always align and steps in the lifecycle may have been skipped or completed in a different order. We have applied the most logical next step based on where the project is at and what has already been completed.

As a summary, the following is noted:

- 79 projects fall within the concept phase of development (it is important to note that while many opportunities have been noted at a top-line level in existing studies and broader master plans, there is a need to refine their concepts and test market demand as part of a more detailed assessment);
- 5 are within the design phase; and
- 5 are within the activation phase.

As next steps:

- 79 projects require concept refinement and market assessments; and
- 10 projects are at the stage where they need to obtain a DA (if required based on their development) and to obtain funding.

[41] Tourism Investment Guidelines, 2008, modified by Stafford

Figure 28: Project development lifecycle assessment

Project Name	LGA	Project Type	Project Stage/Stages Completed	Next Step
3.5-star branded business/leisure hotel	Ararat	Private investment driver	Concept identified	Concept refinement & market assessment required
4-star hotel/resort with F&B at Halls Gap	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
4WD adventure tours	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Activation of City to River Masterplan with event	Horsham	Public enabler for private investment	Concept identified	Concept refinement & market assessment required
Activation of waterways (kayaking, paddle boarding)	Horsham	Private investment driver	Concept identified	Concept refinement & market assessment required
Additional child-friendly infrastructure (family market)	Horsham	Public infrastructure	Concept identified	Concept refinement & market assessment required
Agridome style attraction (with a sheep focus)	Southern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Airport site redevelopment (with tourism offering)	Horsham	Private investment driver	Concept identified	Concept refinement & market assessment required
Annual sound and light show with storytelling	Northern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
Ararat Dirt Mtn Bike 12 Hr Race	Ararat	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Ararat Trails Mountain Bike Park	Ararat	Public infrastructure	Business case developed	Applying for DA (where applicable) & obtaining funding
Brambuk upgrade	Northern Grampians	Public enabler for private investment	Broader master plan developed & concept identified	Concept refinement & market assessment required
Car and motorbike hill climb (enhancement of existing event)	Ararat	Public infrastructure	Concept identified	Concept refinement & market assessment required
Destination branding for the Grampians and sub-regions	Ararat	Public enabler for private investment	Concept identified	Concept refinement & market assessment required
Destination holiday park	Horsham	Private investment driver	Concept identified	Concept refinement & market assessment required
Development of multi-use trails	Southern Grampians	Public infrastructure	Concept identified & some consultation undertaken	Concept refinement & market assessment required
Dunkeld geothermal spa experience	Southern Grampians	Private investment driver	Concept identified & some consultation undertaken	Concept refinement & market assessment required
Dunkeld luxury units	Southern Grampians	Private investment driver	Concept identified & some consultation undertaken	Concept refinement & market assessment required
Dunkeld visitor hub	Southern Grampians	Public enabler for private investment	Concept design developed & funding secured for stage 1	Obtaining funding (stage 2)
Enhanced facilities & shuttle bus service into Mackenzie Falls	Northern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
Equine trails with tours	Horsham	Private investment driver	Concept identified	Concept refinement & market assessment required

Project Name	LGA	Project Type	Project Stage/Stages Completed	Next Step
Extreme sports skills development & training facility	Northern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
F&B and tourism operator ATDW awareness program & digital readiness training	Ararat	Public infrastructure	Concept identified	Concept refinement & market assessment required
F&B roster development	Ararat	Public infrastructure	Concept identified	Concept refinement & market assessment required
F&B upskilling and training programme	Ararat	Public enabler for private investment	Concept identified	Concept refinement & market assessment required
Farm stay accommodation	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Garden tours (public and private gardens)	Southern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Gin/vodka/tequila distillery	Ararat	Private investment driver	Concept identified	Concept refinement & market assessment required
Glamping pods	Ararat	Private investment driver	Concept identified	Concept refinement & market assessment required
GPT staged trek separation (2–3-night blocks)	Northern Grampians	Public enabler for private investment	Broader master plan developed & concept identified	Concept refinement & market assessment required
Grampians food & wine packages	Ararat	Private investment driver	Concept identified & some consultation undertaken	Concept refinement & market assessment required
Grampians tasting trail	Ararat	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Grampians Tourism Region Road Cycling Granfondo Event	Ararat	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Grampians triathlon event	Northern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
Grampians Wine Cellars enhancements	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Grampians wine discovery centre	Ararat	Private investment driver	Concept identified	Concept refinement & market assessment required
Great Trail development	Northern Grampians	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Great Western Wine Cycle Trail	Northern Grampians	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Halls Gap southern gateway	Northern Grampians	Public infrastructure	Concept design developed & consultation undertaken	Applying for DA (where applicable) & obtaining funding
Halls Gap walking loop	Northern Grampians	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Halls Gap wayfinding	Northern Grampians	Public enabler for private investment	Broader master plan developed & concept identified	Concept refinement & market assessment required
Hamilton Botanic Garden play space	Southern Grampians	Public infrastructure	Concept design developed & consultation undertaken	Applying for DA (where applicable) & obtaining funding
Heath Street upgrades & bridge	Northern Grampians	Public infrastructure	Concept design developed & consultation undertaken	Applying for DA (where applicable) & obtaining funding

Project Name	LGA	Project Type	Project Stage/Stages Completed	Next Step
Heritage accommodation in Horsham	Horsham	Private investment driver	Concept identified	Concept refinement & market assessment required
Heritage accommodation in St Arnaud	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
High-end eco-lodge	Ararat	Private investment driver	Concept identified	Concept refinement & market assessment required
Horsham public art and indigenous interpretation	Horsham	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Implementation of Volcanic Trail Masterplan	Southern Grampians	Public enabler for private investment	Master plan developed	Applying for DA (where applicable) & obtaining funding
Improved walkability	Northern Grampians	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Indoor, all-weather activity centre (rock climbing/bouldering)	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Inland aquarium attraction	Horsham	Private investment driver	Concept identified	Concept refinement & market assessment required
J Ward commercial ghost tours	Ararat	Private investment driver	Concept identified	Concept refinement & market assessment required
Lake Bellfield amenity improvement	Northern Grampians	Public enabler for private investment	Broader master plan developed & concept identified	Concept refinement & market assessment required
Landscaping & general urban enhancements	Ararat	Public infrastructure	Concept identified	Concept refinement & market assessment required
Lookout/viewing area development and upgrades	Ararat	Public enabler for private investment	Concept identified	Concept refinement & market assessment required
Major car club events (classic, vintage, veteran)	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Major regional sports carnival event (netball)	Northern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
Mobile and digital connectivity improvements	Northern Grampians	Public enabler for private investment	Concept identified	Concept refinement & market assessment required
Motel retrofitting (4-8 properties)	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Mount Zero resort (Stage 1)	Horsham	Private investment driver	Business case & investment prospectus developed	Applying for DA (where applicable) & obtaining funding
Napier Street retail facade upgrades	Northern Grampians	Public infrastructure	Concept identified & some consultation undertaken	Concept refinement & market assessment required
New Grampians destination food event	Southern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
New Hamilton Art Gallery project	Southern Grampians	Public infrastructure	Business case developed	Applying for DA (where applicable) & obtaining funding
Off-park lodge sites to link into the GPT	Southern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Orchid tours, orchid house, and spring flower tours	Horsham	Private investment driver	Concept identified	Concept refinement & market assessment required

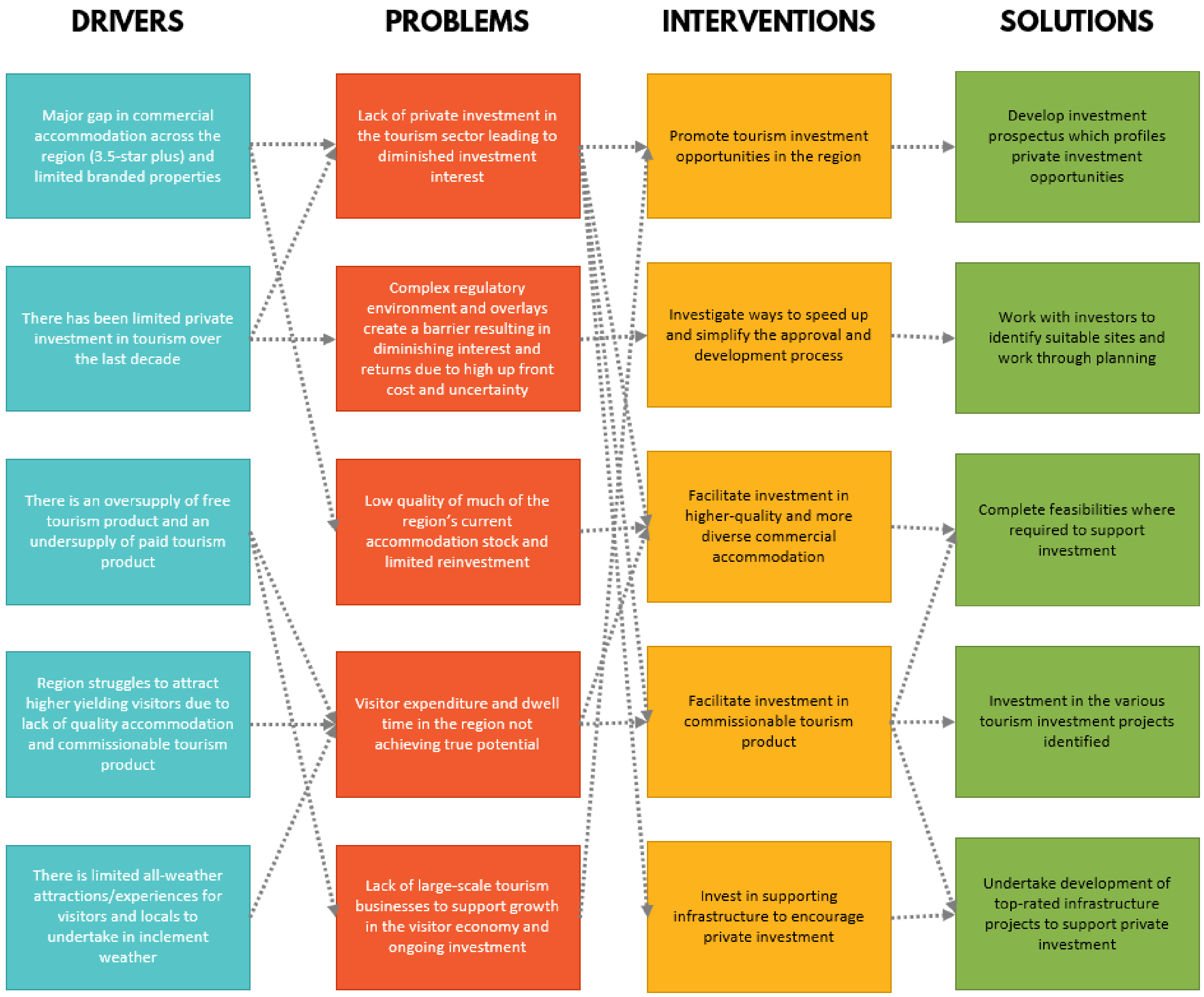
Project Name	LGA	Project Type	Project Stage/Stages Completed	Next Step
Outdoor adventure hub (high rope aerial course, flying fox)	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Outdoor multi-purpose sports precinct	Horsham	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Peak season public transport for tourists	Horsham	Public enabler for private investment	Concept identified	Concept refinement & market assessment required
Pop-up café and water sport hire	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Public toilet upgrades and enhancements	Ararat	Public infrastructure	Concept identified	Concept refinement & market assessment required
Queen Mary Botanic Gardens heritage precinct	Northern Grampians	Public infrastructure	Concept identified & some consultation undertaken	Concept refinement & market assessment required
Recreational fishing and competition	Horsham	Private investment driver	Concept identified	Concept refinement & market assessment required
Regional indoor sports precinct	Horsham	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Restaurant & function centre on river-edge	Horsham	Private investment driver	Broader master plan developed & concept identified	Concept refinement & market assessment required
Roading upgrades	Ararat	Public enabler for private investment	Concept identified	Concept refinement & market assessment required
Sawyer Park sound shell upgrade	Horsham	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Signage audit & upgrades (directional & interpretive)	Ararat	Public enabler for private investment	Concept identified	Concept refinement & market assessment required
Solar car events	Northern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
St Arnaud Mural Trail at the Raillery Hub	Northern Grampians	Public infrastructure	Concept identified & some consultation undertaken	Concept refinement & market assessment required
Stawell Gift Race enhancements (e.g., woman's event)	Northern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
Stawell Underground Physics Laboratory Stage 2	Northern Grampians	Public infrastructure	Business case developed (stage 2) & funding secured for stage 1	Obtaining funding (Stage 2)
Telling the story of goldfields, linking with the current gold mine	Northern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
Tourism aviation activity (scenic flights, gliding, pax services)	Horsham	Private investment driver	Concept identified	Concept refinement & market assessment required
Updated entrance way & admin building for Halls Gap Zoo	Northern Grampians	Private investment driver	Concept design developed & consultation undertaken	Applying for DA (where applicable) & obtaining funding
Visitor dispersal strategy throughout GNP	Northern Grampians	Public infrastructure	Concept identified	Concept refinement & market assessment required
Waterway electric houseboats	Northern Grampians	Private investment driver	Concept identified	Concept refinement & market assessment required
Wildlife habitat & cultural education centre	Ararat	Public enabler for private investment	Concept identified	Concept refinement & market assessment required

Project Name	LGA	Project Type	Project Stage/Stages Completed	Next Step
Wimmera River Discovery Trail Stage 2 (Horsham to Dimboola)	Horsham	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required
Wimmera River precinct water play area	Horsham	Public infrastructure	Broader master plan developed & concept identified	Concept refinement & market assessment required

7.4. Investment Logic Map

The following provides an Investment Logic Map of the tourism investment process to facilitate and optimise public and private investment attraction in the region.

Figure 29: Investment Logic Map



8. THE PRIORITY OPPORTUNITIES

8.1. Private Investment Drivers

8.1.1. Methodology for Prioritisation

To determine the refined list of private investment driver opportunities, each has been assessed against the weighted criteria outlined in Table 16 (public infrastructure and enabler projects have been ranked separately, in discussion with the PCG).

A weighted score has been used to reflect that some of the criteria have a stronger positive impact or a higher level of importance to each Council and the various agencies than others. This weighting has been ranked and tested with the PCG to deliver an agreed weighting spread.

Where possible, the assessment has utilised quantitative data (particularly for those projects where feasibilities or business cases have been developed). In the absence of such assessments, however, a qualitative assessment has been undertaken based on local knowledge, stakeholder consultation, professional experience, and a general assessment of the perceived benefits.

Table 16: Opportunity ranking criteria for private investment driver opportunities

Criteria	Score	Weighting	Description
Landowner	Private land = 3 Council land = 2 Other Govt. agency land = 1 Parks Victoria = 0	1	Projects which are situated on private or council-owned or managed land are ranked higher.
Size of Private Investment	<$100,000 = 1 <$500,000 = 2 <$1,000,000 = 3 >=$10,000,000 = 4	2	Projects which are more likely to attract private sector investment (regardless of the value of this investment) are ranked higher.
Size of Public Investment	<$100,000 = 4 <$500,000 = 3 <$1,000,000 = 2 >=$1,000,000 = 1	2	Projects which have a stronger public sector investment requirement are ranked lower.
Private Sector Interest	<30% of CAPEX = 1 <60% of CAPEX = 2 >60% of CAPEX = 3	4	The level of private sector interest (as a percentage of total investment). Those with a stronger proportion of private sector interest are ranked higher.
Ability to Secure Govt. Funding for Project	None = 0 Limited = 1 Medium = 2 Strong = 3	2	Those projects which may be more likely to be able to secure government funding (capex or opex) are ranked higher.
Requirement for ongoing operational Govt. funding	None = 4 Limited = 3 Medium = 2 Strong = 1	1	If the project is likely to require ongoing government contributions to fund operating costs, it is ranked lower. If the project is likely to be commercially viable/sustainable, it is ranked higher.
Short term to activate	Yes = 1 No = 0	2	If the project is likely to be able to be activated in a shorter period, it is ranked higher.
Likelihood to be profiled by Visit Victoria	None = 0 Limited = 1 Medium = 2 Strong = 3	1	The ability of the project to grow the region's destination profile. Projects which may have stronger marketing budgets (particularly those run by larger tourism players), as well as highly unique products, are ranked higher.
Likely visitor appeal	None = 0 Limited = 1 Medium = 2 Strong = 3	5	The projects which are likely to have a stronger appeal to the visitor market are ranked higher than those which may generate lower visitor interest.

Criteria	Score	Weighting	Description
Ability to encourage regional dispersal of visitors	None = 0 Limited = 1 Medium = 2 Strong = 3	4	If a project is able to encourage stronger visitor dispersal throughout the region, it is ranked higher.
Uniqueness of product	None = 0 Limited = 1 Medium = 2 Strong = 3	4	The uniqueness of the product is ranked according to whether it is unique across Australia (ranked higher), across the region, or whether the product is likely to be unique only to the specific area it is situated in (ranked lower).
Ability to grow visitor yield	None = 0 Limited = 1 Medium = 2 Strong = 3	5	The ability of the project to increase visitor yield. Projects which are likely to encourage greater overnight stays (particularly in commercial accommodation) and those which introduce commissionable elements are ranked higher.
Estimated visitation once operational	0 = 0 1 – 500 = 1 501-5,000 = 2 5,001-10,000 = 3 10,001+ = 4	4	Potential estimated visitor numbers to the project once operational (stronger visitation potential garners a higher score).
Employment (operational) potential	0 = 0 Less than 5 FTE = 1 5-10 FTE = 2 11-20 FTE= 3 21-50 FTE= 4 More than 50 FTE = 5	3	The level of FTE employment generated once the project is operational. The higher the employment potential, the higher the project is rated.
Ability to act as a catalyst project to stimulate other investment projects	None = 0 Limited = 1 Medium = 2 Strong = 3	5	Projects that are more likely to encourage additional or complementary investment into other projects are rated higher.
Ability to encourage stronger interstate visitation	None = 0 Limited = 1 Medium = 2 Strong = 3	3	Those which are likely to encourage stronger interstate (rather than intrastate) visitation are ranked higher.
Ability to encourage stronger international visitation	None = 0 Limited = 1 Medium = 2 Strong = 3	1	Those which are likely to encourage stronger international visitation and profile are ranked higher.

8.1.2. Prioritisation of the Opportunities

Figure 30 summarises the top 15 private investment driver opportunities. These projects achieved a top 15 score based on the ranking methodology described above. Because some projects achieved an equal score, there are some with equal rankings.

It demonstrates that:

- there are eight accommodation investment opportunities and seven attraction/experience opportunities with a top 15 ranking;
- there is a range of types of projects identified across the various towns in the Grampians (four in both Northern Grampians and Horsham LGAs, three in both Ararat and Southern Grampians LGAs and one regional project); and
- the total investment for the top 15 projects is estimated at $240 million, of which $210.7 million is private investment and $29.7 million is supporting public investment.

Table 17 on the following page provides the full ranking of the projects based on the total weighted score, followed by Table 18 which provides a more detailed breakdown of the project scores achieved.

Figure 30: The top 15 private investment driver opportunities (weighted score)

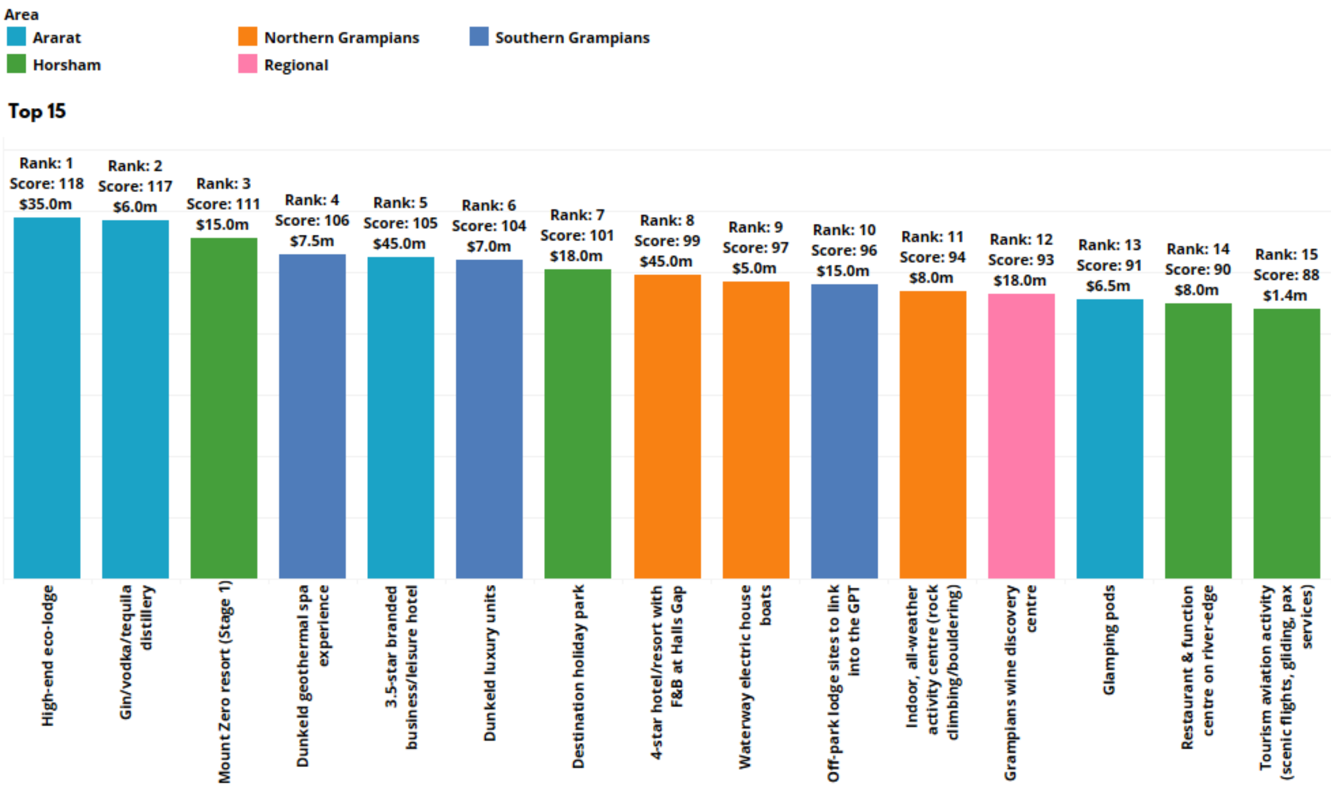


Table 17: Private investment driver opportunities – full matrix

Project Name	Ability to act as a catalyst project to stimulate other invest..	Ability to encourage stronger international visitation	Ability to encourage stronger interstate visitation	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding for Project	Employment (Operational) Potential	Estimated Visitation	Landowner	Likelihood to be profiled by Visit Victoria	Likely visitor appeal	Private Sector Interest	Short term to Activate	Regional Dispersal of Visitors	Requirement for ongoing operational Govt. funding	Uniqueness of Product	Est. CAPEX	Est. Private	Est. Public
3.5-star branded business/leisure hotel	Medium	Limited	Limited	Medium	Limited	More than 50 FTE	10,001-25,000	Council	Limited	Strong	Strong	No	Limited	None	None	$45,000,000	$40,500,000	$4,500,000
4-star hotel/resort with F&B at Halls Gap	Strong	Limited	Medium	Medium	None	21-50 FTE	5,001-10,000	Private	None	Medium	Strong	No	Limited	None	None	$45,000,000	$40,500,000	$4,500,000
4WD adventure tours	None	None	None	Limited	None	Less than 5 FTE	501-5,000	Private	Limited	Limited	Strong	Yes	Strong	None	Locally Unique	$65,000	$58,500	$6,500
Activation of waterways (kayaking, paddle boarding)	None	None	None	Limited	None	Less than 5 FTE	5,001-10,000	Private	Limited	Medium	Strong	Yes	Limited	None	None	$35,000	$35,000	$0
Agridome style attraction (with a sheep focus)	Limited	Limited	Medium	Medium	Limited	5-10 FTE	25,000+	Private	Medium	Medium	Medium	No	Limited	Medium	State-wide Unique	$12,000,000	$6,000,000	$6,000,000
Airport site redevelopment (with tourism offering)	Medium	None	Limited	Limited	Limited	5-10 FTE	501-5,000	Council	None	Medium	Medium	No	Limited	Limited	None	$5,000,000	$2,500,000	$2,500,000
Destination holiday park	Strong	None	Medium	Medium	None	5-10 FTE	5,001-10,000	Private	None	Strong	Strong	No	Medium	None	None	$18,000,000	$16,200,000	$1,800,000
Dunkeld geothermal spa experience	Strong	Limited	Medium	Strong	None	5-10 FTE	501-5,000	Private	Strong	Strong	Strong	No	Limited	None	Locally Unique	$7,500,000	$7,500,000	$0
Dunkeld luxury units	Strong	Limited	Medium	Strong	None	5-10 FTE	501-5,000	Private	Limited	Strong	Strong	No	Limited	None	Locally Unique	$7,000,000	$7,000,000	$0
Equine trails with tours	None	None	Limited	Limited	None	5-10 FTE	501-5,000	Other Govt.	Limited	Limited	Strong	No	Medium	None	Locally Unique	$100,000	$90,000	$10,000
Farm stay accommodation	Medium	Limited	Medium	Limited	None	11-20 FTE	501-5,000	Private	None	Limited	Strong	Yes	Medium	None	None	$1,000,000	$1,000,000	$0
Garden tours (public and private gardens)	None	None	None	Limited	Limited	Less than 5 FTE	501-5,000	Council	Limited	Medium	Strong	Yes	Medium	Limited	Locally Unique	$50,000	$45,000	$5,000
Gin/vodka/tequila distillery	Strong	Limited	Strong	Medium	None	11-20 FTE	10,001-25,000	Private	Limited	Strong	Strong	No	Medium	None	Regionally Unique	$6,000,000	$6,000,000	$0
Glamping pods	Medium	Limited	Limited	Medium	None	5-10 FTE	5,001-10,000	Private	Limited	Strong	Strong	No	Limited	None	Regionally Unique	$6,500,000	$5,850,000	$650,000
Grampians food & wine packages	None	None	Limited	Medium	Limited	Less than 5 FTE	501-5,000	Private	Medium	Medium	Strong	Yes	Medium	Limited	Locally Unique	$50,000	$45,000	$5,000
Grampians Wine Cellars enhancements	None	None	None	Limited	None	Less than 5 FTE	5,001-10,000	Private	Limited	Medium	Strong	No	Limited	None	Locally Unique	$155,000	$139,500	$15,500
Grampians wine discovery centre	Limited	Limited	Medium	Medium	Limited	5-10 FTE	10,001-25,000	Council	Strong	Medium	Medium	No	Strong	None	Regionally Unique	$18,000,000	$9,000,000	$9,000,000
Heritage accommodation in Horsham	Limited	Limited	Limited	Limited	Limited	11-20 FTE	5,001-10,000	Private	None	Limited	Strong	No	None	Limited	Locally Unique	$5,000,000	$4,500,000	$500,000
Heritage accommodation in St Arnaud	Medium	Limited	Medium	Limited	Limited	11-20 FTE	5,001-10,000	Private	None	Limited	Strong	No	Limited	Limited	None	$5,000,000	$4,500,000	$500,000
High-end eco-lodge	Strong	Medium	Strong	Strong	Limited	11-20 FTE	5,001-10,000	Council	Strong	Strong	Strong	No	Medium	None	Locally Unique	$35,000,000	$31,500,000	$3,500,000
Indoor, all-weather activity centre (rock climbing/bouldering)	Limited	None	Medium	Medium	Medium	11-20 FTE	5,001-10,000	Private	Medium	Strong	Strong	No	Limited	None	Regionally Unique	$8,000,000	$5,200,000	$2,800,000
Inland aquarium attraction	Limited	None	Limited	Limited	None	5-10 FTE	5,001-10,000	Council	Limited	Medium	Strong	No	Limited	None	Regionally Unique	$2,500,000	$2,250,000	$250,000
J Ward commercial ghost tours	Limited	Limited	Limited	Limited	Medium	5-10 FTE	5,001-10,000	Other Govt.	Medium	Medium	Strong	Yes	Limited	Limited	State-wide Unique	$100,000	$90,000	$10,000
Major car club events (classic, vintage, veteran)	None	Limited	Medium	Medium	Limited	11-20 FTE	501-5,000	Private	Limited	Medium	Strong	Yes	Medium	None	Locally Unique	$500,000	$450,000	$50,000
Motel retrofitting (4-8 properties)	Limited	None	Limited	Limited	None	5-10 FTE	10,001-25,000	Private	None	Medium	Strong	No	Limited	None	None	$800,000	$760,000	$40,000
Mount Zero resort (Stage 1)	Strong	Limited	Strong	Strong	Limited	21-50 FTE	5,001-10,000	Private	None	Medium	Strong	No	Limited	None	None	$15,000,000	$14,250,000	$750,000
Off-park lodge sites to link into the GPT	Limited	None	Medium	Medium	None	21-50 FTE	5,001-10,000	Private	Medium	Medium	Strong	No	Medium	None	Regionally Unique	$15,000,000	$14,250,000	$750,000
Orchid tours, orchid house and spring flower tours	None	Limited	Medium	Medium	Limited	5-10 FTE	501-5,000	Council	Limited	Medium	Limited	No	Limited	Limited	Regionally Unique	$500,000	$75,000	$425,000
Outdoor adventure hub (high rope aerial course, flying fox)	Limited	None	None	Limited	Limited	Less than 5 FTE	501-5,000	Council	Medium	Medium	Strong	No	Limited	None	Locally Unique	$1,000,000	$900,000	$100,000
Pop-up café and water sport hire	Limited	None	Limited	Limited	None	5-10 FTE	501-5,000	Private	None	Limited	Strong	Yes	Limited	None	Locally Unique	$120,000	$108,000	$12,000
Recreational fishing and competition	None	None	Medium	Limited	Limited	5-10 FTE	501-5,000	Council	Limited	Medium	Strong	Yes	Medium	Limited	Locally Unique	$65,000	$58,500	$6,500
Restaurant & function centre on river-edge	Medium	None	Medium	Medium	None	11-20 FTE	10,001-25,000	Private	None	Medium	Strong	No	None	None	None	$8,000,000	$7,200,000	$800,000
Tourism aviation activity (scenic flights, gliding, pax services)	None	Limited	Limited	Medium	Limited	21-50 FTE	501-5,000	Private	None	Medium	Strong	No	Strong	Limited	None	$1,400,000	$1,260,000	$140,000
Updated entrance way & admin building for Halls Gap Zoo	Limited	Limited	Limited	Limited	Limited	Less than 5 FTE	25,000+	Private	Medium	Medium	Strong	Yes	Limited	None	Locally Unique	$1,500,000	$1,350,000	$150,000
Waterway electric house boats	Medium	Medium	Strong	Strong	Limited	5-10 FTE	501-5,000	Private	Medium	Medium	Strong	No	Limited	None	State-wide Unique	$5,000,000	$4,500,000	$500,000

Table 18: Private investment driver opportunities – unweighted & weighted scores

		Ability to act as a catalyst project to stimulate other investment projects Score	Ability to encourage stronger interstate visitation score	Ability to encourage stronger international visitation score	Ability to Secure Govt. Funding for Project Score	Ability to Grow Visitor Yield Score	Employment (Operational) Potential Score	Estimated Visitation Score	Landowner Score	Likely visitor appeal Score	Likelihood to be profiled by Visit Victoria Score	Private Sector Interest Score	Regional Dispersal of Visitors Score	Requirement for ongoing operational Govt. funding Score	Short Term to Activate Score	Size of Private Investment Score	Size of Public Investment Score	Total
High-end eco-lodge	Unweighted Score	3.0	3.0	2.0	1.0	3.0	3.0	3.0	2.0	3.0	3.0	3.0	2.0	4.0	0.0	4.0	1.0	**40.0**
	Weighted Score	15.0	9.0	2.0	2.0	15.0	9.0	12.0	2.0	15.0	3.0	12.0	8.0	4.0	0.0	8.0	2.0	**118.0**
Gin/vodka/tequila distillery	Unweighted Score	3.0	3.0	1.0	0.0	2.0	3.0	4.0	3.0	3.0	1.0	3.0	2.0	4.0	0.0	3.0	4.0	**39.0**
	Weighted Score	15.0	9.0	1.0	0.0	10.0	9.0	16.0	3.0	15.0	1.0	12.0	8.0	4.0	0.0	6.0	8.0	**117.0**
Mount Zero resort (Stage 1)	Unweighted Score	3.0	3.0	1.0	1.0	3.0	4.0	3.0	3.0	2.0	0.0	3.0	1.0	4.0	0.0	4.0	2.0	**37.0**
	Weighted Score	15.0	9.0	1.0	2.0	15.0	12.0	12.0	3.0	10.0	0.0	12.0	4.0	4.0	0.0	8.0	4.0	**111.0**
Dunkeld geothermal spa experience	Unweighted Score	3.0	2.0	1.0	0.0	3.0	2.0	2.0	3.0	3.0	3.0	3.0	1.0	4.0	0.0	3.0	4.0	**37.0**
	Weighted Score	15.0	6.0	1.0	0.0	15.0	6.0	8.0	3.0	15.0	3.0	12.0	4.0	4.0	0.0	6.0	8.0	**106.0**
3.5-star branded business/leisure hotel	Unweighted Score	2.0	1.0	1.0	1.0	2.0	5.0	4.0	2.0	3.0	1.0	3.0	1.0	4.0	0.0	4.0	1.0	**35.0**
	Weighted Score	10.0	3.0	1.0	2.0	10.0	15.0	16.0	2.0	15.0	1.0	12.0	4.0	4.0	0.0	8.0	2.0	**105.0**
Dunkeld luxury units	Unweighted Score	3.0	2.0	1.0	0.0	3.0	2.0	2.0	3.0	3.0	1.0	3.0	1.0	4.0	0.0	3.0	4.0	**35.0**
	Weighted Score	15.0	6.0	1.0	0.0	15.0	6.0	8.0	3.0	15.0	1.0	12.0	4.0	4.0	0.0	6.0	8.0	**104.0**
Destination holiday park	Unweighted Score	3.0	2.0	0.0	0.0	2.0	2.0	3.0	3.0	3.0	0.0	3.0	2.0	4.0	0.0	4.0	1.0	**32.0**
	Weighted Score	15.0	6.0	0.0	0.0	10.0	6.0	12.0	3.0	15.0	0.0	12.0	8.0	4.0	0.0	8.0	2.0	**101.0**
4-star hotel/resort with F&B at Halls Gap	Unweighted Score	3.0	2.0	1.0	0.0	2.0	4.0	3.0	3.0	2.0	0.0	3.0	1.0	4.0	0.0	4.0	1.0	**33.0**
	Weighted Score	15.0	6.0	1.0	0.0	10.0	12.0	12.0	3.0	10.0	0.0	12.0	4.0	4.0	0.0	8.0	2.0	**99.0**
Waterway electric house boats	Unweighted Score	2.0	3.0	2.0	1.0	3.0	2.0	2.0	3.0	2.0	2.0	3.0	1.0	4.0	0.0	3.0	2.0	**35.0**
	Weighted Score	10.0	9.0	2.0	2.0	15.0	6.0	8.0	3.0	10.0	2.0	12.0	4.0	4.0	0.0	6.0	4.0	**97.0**
Off-park lodge sites to link into the GPT	Unweighted Score	1.0	2.0	0.0	0.0	2.0	4.0	3.0	3.0	2.0	2.0	3.0	2.0	4.0	0.0	4.0	2.0	**34.0**
	Weighted Score	5.0	6.0	0.0	0.0	10.0	12.0	12.0	3.0	10.0	2.0	12.0	8.0	4.0	0.0	8.0	4.0	**96.0**
Indoor, all-weather activity centre (rock climbing/bouldering)	Unweighted Score	1.0	2.0	0.0	2.0	2.0	3.0	3.0	3.0	3.0	2.0	3.0	1.0	4.0	0.0	3.0	1.0	**33.0**
	Weighted Score	5.0	6.0	0.0	4.0	10.0	9.0	12.0	3.0	15.0	2.0	12.0	4.0	4.0	0.0	6.0	2.0	**94.0**
Grampians wine discovery centre	Unweighted Score	1.0	2.0	1.0	1.0	2.0	2.0	4.0	2.0	2.0	3.0	2.0	3.0	4.0	0.0	3.0	1.0	**33.0**
	Weighted Score	5.0	6.0	1.0	2.0	10.0	6.0	16.0	2.0	10.0	3.0	8.0	12.0	4.0	0.0	6.0	2.0	**93.0**
Glamping pods	Unweighted Score	2.0	1.0	1.0	0.0	2.0	2.0	3.0	3.0	3.0	1.0	3.0	1.0	4.0	0.0	3.0	2.0	**31.0**
	Weighted Score	10.0	3.0	1.0	0.0	10.0	6.0	12.0	3.0	15.0	1.0	12.0	4.0	4.0	0.0	6.0	4.0	**91.0**
Restaurant & function centre on river-edge	Unweighted Score	2.0	2.0	0.0	0.0	2.0	3.0	4.0	3.0	2.0	0.0	3.0	0.0	4.0	0.0	3.0	2.0	**30.0**
	Weighted Score	10.0	6.0	0.0	0.0	10.0	9.0	16.0	3.0	10.0	0.0	12.0	0.0	4.0	0.0	6.0	4.0	**90.0**
Updated entrance way & admin building for Halls Gap Zoo	Unweighted Score	1.0	1.0	1.0	1.0	1.0	1.0	5.0	3.0	2.0	2.0	3.0	1.0	4.0	1.0	3.0	3.0	**33.0**
	Weighted Score	5.0	3.0	1.0	2.0	5.0	3.0	20.0	3.0	10.0	2.0	12.0	4.0	4.0	2.0	6.0	6.0	**88.0**
Tourism aviation activity (scenic flights, gliding, pax services)	Unweighted Score	0.0	1.0	1.0	1.0	2.0	4.0	2.0	3.0	2.0	0.0	3.0	3.0	3.0	0.0	3.0	3.0	**31.0**
	Weighted Score	0.0	3.0	1.0	2.0	10.0	12.0	8.0	3.0	10.0	0.0	12.0	12.0	3.0	0.0	6.0	6.0	**88.0**
Major car club events (classic, vintage, veteran)	Unweighted Score	0.0	2.0	1.0	1.0	2.0	3.0	2.0	3.0	2.0	1.0	3.0	2.0	4.0	1.0	2.0	4.0	**33.0**
	Weighted Score	0.0	6.0	1.0	2.0	10.0	9.0	8.0	3.0	10.0	1.0	12.0	8.0	4.0	2.0	4.0	8.0	**88.0**
Farm stay accommodation	Unweighted Score	2.0	2.0	1.0	0.0	1.0	3.0	2.0	3.0	1.0	0.0	3.0	2.0	4.0	1.0	3.0	4.0	**32.0**
	Weighted Score	10.0	6.0	1.0	0.0	5.0	9.0	8.0	3.0	5.0	0.0	12.0	8.0	4.0	2.0	6.0	8.0	**87.0**
Agridome style attraction (with a sheep focus)	Unweighted Score	1.0	2.0	1.0	1.0	2.0	2.0	5.0	3.0	2.0	2.0	2.0	1.0	2.0	0.0	3.0	1.0	**30.0**
	Weighted Score	5.0	6.0	1.0	2.0	10.0	6.0	20.0	3.0	10.0	2.0	8.0	4.0	2.0	0.0	6.0	2.0	**87.0**
Motel retrofitting (4-8 properties)	Unweighted Score	1.0	1.0	0.0	0.0	1.0	2.0	4.0	3.0	2.0	0.0	3.0	1.0	4.0	0.0	3.0	4.0	**29.0**
	Weighted Score	5.0	3.0	0.0	0.0	5.0	6.0	16.0	3.0	10.0	0.0	12.0	4.0	4.0	0.0	6.0	8.0	**82.0**
Heritage accommodation in St Arnaud	Unweighted Score	2.0	2.0	1.0	1.0	1.0	3.0	3.0	3.0	1.0	0.0	3.0	1.0	3.0	0.0	3.0	2.0	**29.0**
	Weighted Score	10.0	6.0	1.0	2.0	5.0	9.0	12.0	3.0	5.0	0.0	12.0	4.0	3.0	0.0	6.0	4.0	**82.0**
J Ward commercial ghost tours	Unweighted Score	1.0	1.0	1.0	2.0	1.0	2.0	3.0	1.0	2.0	2.0	3.0	1.0	3.0	1.0	1.0	4.0	**29.0**
	Weighted Score	5.0	3.0	1.0	4.0	5.0	6.0	12.0	1.0	10.0	2.0	12.0	4.0	3.0	2.0	2.0	8.0	**80.0**
Inland aquarium attraction	Unweighted Score	1.0	1.0	0.0	0.0	1.0	2.0	3.0	2.0	2.0	1.0	3.0	1.0	4.0	0.0	3.0	3.0	**27.0**
	Weighted Score	5.0	3.0	0.0	0.0	5.0	6.0	12.0	2.0	10.0	1.0	12.0	4.0	4.0	0.0	6.0	6.0	**76.0**
Grampians food & wine packages	Unweighted Score	0.0	1.0	0.0	1.0	2.0	1.0	2.0	3.0	2.0	2.0	3.0	2.0	3.0	1.0	1.0	4.0	**28.0**
	Weighted Score	0.0	3.0	0.0	2.0	10.0	3.0	8.0	3.0	10.0	2.0	12.0	8.0	3.0	2.0	2.0	8.0	**76.0**
Recreational fishing and competition	Unweighted Score	0.0	2.0	0.0	1.0	1.0	2.0	2.0	2.0	2.0	1.0	3.0	2.0	3.0	1.0	1.0	4.0	**27.0**
	Weighted Score	0.0	6.0	0.0	2.0	5.0	6.0	8.0	2.0	10.0	1.0	12.0	8.0	3.0	2.0	2.0	8.0	**75.0**
Heritage accommodation in Horsham	Unweighted Score	1.0	1.0	1.0	1.0	1.0	3.0	3.0	3.0	1.0	0.0	3.0	0.0	3.0	0.0	3.0	2.0	**26.0**
	Weighted Score	5.0	3.0	1.0	2.0	5.0	9.0	12.0	3.0	5.0	0.0	12.0	0.0	3.0	0.0	6.0	4.0	**70.0**
Pop-up café and water sport hire	Unweighted Score	1.0	1.0	0.0	0.0	1.0	2.0	2.0	3.0	1.0	0.0	3.0	1.0	4.0	1.0	2.0	4.0	**26.0**
	Weighted Score	5.0	3.0	0.0	0.0	5.0	6.0	8.0	3.0	5.0	0.0	12.0	4.0	4.0	2.0	4.0	8.0	**69.0**
Outdoor adventure hub (high rope aerial course, flying fox)	Unweighted Score	1.0	0.0	0.0	1.0	1.0	1.0	2.0	2.0	2.0	2.0	3.0	1.0	4.0	0.0	3.0	3.0	**26.0**
	Weighted Score	5.0	0.0	0.0	2.0	5.0	3.0	8.0	2.0	10.0	2.0	12.0	4.0	4.0	0.0	6.0	6.0	**69.0**
Airport site redevelopment (with tourism offering)	Unweighted Score	2.0	1.0	0.0	1.0	1.0	2.0	2.0	2.0	2.0	0.0	2.0	1.0	3.0	0.0	3.0	1.0	**23.0**
	Weighted Score	10.0	3.0	0.0	2.0	5.0	6.0	8.0	2.0	10.0	0.0	8.0	4.0	3.0	0.0	6.0	2.0	**69.0**
Grampians Wine Cellars enhancements	Unweighted Score	0.0	0.0	0.0	0.0	1.0	1.0	3.0	3.0	2.0	1.0	3.0	1.0	4.0	0.0	2.0	4.0	**25.0**
	Weighted Score	0.0	0.0	0.0	0.0	5.0	3.0	12.0	3.0	10.0	1.0	12.0	4.0	4.0	0.0	4.0	8.0	**66.0**
Garden tours (public and private gardens)	Unweighted Score	0.0	0.0	0.0	1.0	1.0	1.0	2.0	2.0	2.0	1.0	3.0	2.0	3.0	1.0	1.0	4.0	**24.0**
	Weighted Score	0.0	0.0	0.0	2.0	5.0	3.0	8.0	2.0	10.0	1.0	12.0	8.0	3.0	2.0	2.0	8.0	**66.0**
Activation of waterways (kayaking, paddle boarding)	Unweighted Score	0.0	0.0	0.0	0.0	1.0	1.0	3.0	3.0	2.0	1.0	3.0	1.0	4.0	1.0	1.0	4.0	**25.0**
	Weighted Score	0.0	0.0	0.0	0.0	5.0	3.0	12.0	3.0	10.0	1.0	12.0	4.0	4.0	2.0	2.0	8.0	**66.0**
Orchid tours, orchid house and spring flower tours	Unweighted Score	0.0	2.0	1.0	1.0	2.0	2.0	2.0	2.0	2.0	1.0	1.0	1.0	3.0	0.0	1.0	3.0	**24.0**
	Weighted Score	0.0	6.0	1.0	2.0	10.0	6.0	8.0	2.0	10.0	1.0	4.0	4.0	3.0	0.0	2.0	6.0	**65.0**
4WD adventure tours	Unweighted Score	0.0	0.0	0.0	0.0	1.0	1.0	2.0	3.0	1.0	1.0	3.0	3.0	4.0	1.0	1.0	4.0	**25.0**
	Weighted Score	0.0	0.0	0.0	0.0	5.0	3.0	8.0	3.0	5.0	1.0	12.0	12.0	4.0	2.0	2.0	8.0	**65.0**
Equine trails with tours	Unweighted Score	0.0	1.0	0.0	0.0	1.0	2.0	2.0	1.0	1.0	1.0	3.0	2.0	4.0	0.0	1.0	4.0	**23.0**
	Weighted Score	0.0	3.0	0.0	0.0	5.0	6.0	8.0	1.0	5.0	1.0	12.0	8.0	4.0	0.0	2.0	8.0	**63.0**

8.1.3. The Priority Opportunities in Detail

8.1.3.1. High-end eco-lodge, Ararat

Ararat has limited diverse and higher quality accommodation options. This results in economic leakage and a shorter visitor dwell time as visitors opt to stay outside of the area. To lift the quality of accommodation on offer in Ararat and to complement the high-quality environment, the opportunity exists to develop a higher-end eco-lodge.

Those well-established and successful upmarket lodges often have a strong all year-round clientele, with different experiences able to be offered in summer and shoulder months, compared to winter periods. Considering the excellent fishing options, hunting, cycling, trekking and bird spotting available throughout the broader area, potential should exist for year-round demand in the region.

Typically, these types of facilities may be characterised by:

- stunning coastal, hinterland or river locations;
- absolute privacy reflecting the demands of the clientele and the need for exclusivity;
- high-quality landscaping and where appropriate spas, hot tubs, and pools;
- often offering 12-25 villas or luxury rooms;
- having onsite staff accommodation due to their relative isolation and the need to engage highly skilled staff who expect to have accommodation on-site;
- offer a wellness centre that includes a high-quality day spa and yoga studio;
- exclusive dining options but with the potential for a smaller percentage of casual pre-booked diners; and
- would need to be a greenfield development with stunning architectural features and on sites greater than 8 ha.

While no specific site has yet been identified, finding one near/amongst the LGA's wineries would be ideal.

The investment required for such a property is estimated at $35 million.

Figure 31: High-quality, eco-lodge precedents[42]

[42] Spicers Peak Lodge, Maryvale, QLD; The Cradle Boutique Hotel, TAS; Skyscape, Twizel, New Zealand

8.1.3.2. Gin/vodka/tequila distillery, Ararat

The Grampians has a solid profile as a wine production and agricultural region. The potential exists to build on this profile and look to introduce, through potentially using a re-purposed industrial building (a depot etc), a distillery (gin, vodka or potentially tequila), or possibly a cider house or craft beer brewery.

These types of facilities offer an exciting mechanism to encourage more visitors to stop and stay in the area, especially where the facility can also offer tasting sessions, guided tours, meals and a venue for events and functions (which support local community needs as well).

Using natural ingredients to create unique tastes (wildflowers, berries, barks etc), the facility could generate both a very strong local market and a seasonal visitor market.

Ideally, a suitable site could be in and around the main street of Ararat, where visitors can undertake a tasting and/or a, meal, then walk back to their accommodation. Space-wise, gin, vodka or tequila distilleries take up little industrial space, unlike whisky distilleries which require a much larger footprint.

The capital cost to set up a small distillery can vary markedly depending on the facility being retrofitted and the quality of fit out being applied, but in broad terms, could cost circa $6 million-plus.

Figure 32: Distillery precedents[43]

[43] Kalki Moon Distilling & Brewing, QLD; Borough Market Gin Distillery, UK; Wildbrumby Schnapps Distillery, NSW; Fossey's Distillery, VIC.

8.1.3.3. Mount Zero Resort (Stage 1), Horsham

This project has been proposed by the owners of Australian Wildflowers who own a site abutting the Grampians Peaks Trailhead and GNP at Mount Zero (situated within Horsham LGA but very close to the border with Northern Grampians). The concept will provide a bookend to the high-quality dining experience at the Royal Mail Hotel in Dunkeld.

The first stage of the two-staged concept involves the development of 40 luxury accommodation units as well as the development of a function centre, spa and wellness facility, restaurant and café, car parking, and landscaping. The longer-term concept (stage 2) involves a range of up to 110 short-stay accommodation units. Figure 33 provides a concept image for the resort.

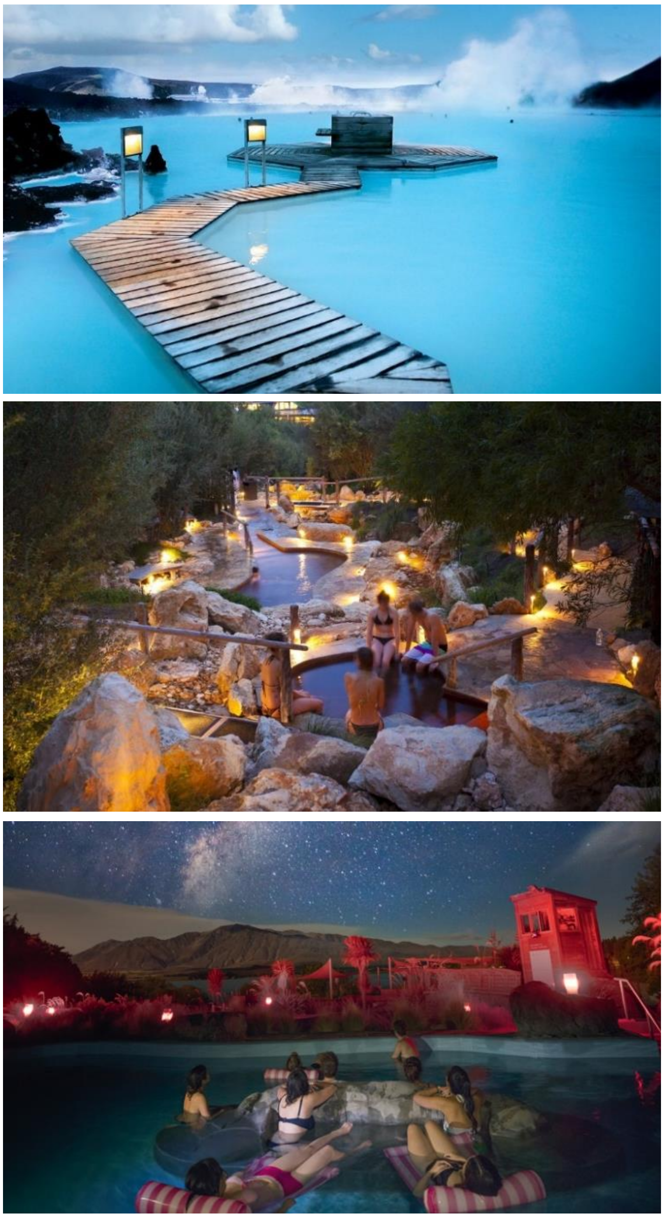
The concept designs have been developed and the project has involved extensive consultation with municipal, parkland and firefighting agencies.

Stage one of the project has an estimated capital cost of $15 million.

Figure 33: Mount Zero resort concept

8.1.3.4. Dunkeld geothermal spa experience, Southern Grampians

Figure 34: Spa/geothermal experience precedents



Spa tourism is in its relative infancy in Australia but it is a growing market. This growth is underpinned by the increasing affluence of western society and the desire for self-care. Internationally, there are many examples of successful spa developments, based on both geothermal and natural mineral water supply, and the market continues to gain momentum.

Victoria offers a climate that makes it ideal to leverage this growth, with the state already having several high-quality spa destinations including Daylesford and the Macedon Ranges and the Mornington Peninsula as well as various experiences in Melbourne, the Great Ocean Road, and the Murray region. The Grampians, not only offers a climate that is suited to geothermal spa experiences, but also has a product base and brand positioning that strongly complements this type of product.

The market attracted to spa tourism is generally a higher-yielding market, with a propensity to spend on higher-quality accommodation options and related quality food and beverage.

Figure 34 provides some spa experience precedents.

Southern Grampians appears to be best suited out of the four LGAs in the Grampians for the development of a geothermal spa experience given its geothermal temperatures (see Figure 35). Portland, which is situated a 116km drive from Dunkeld, has historically used geothermal water for heating, while Port Fairy and Port Campbell have cooled their geothermal water for domestic supply.[44]

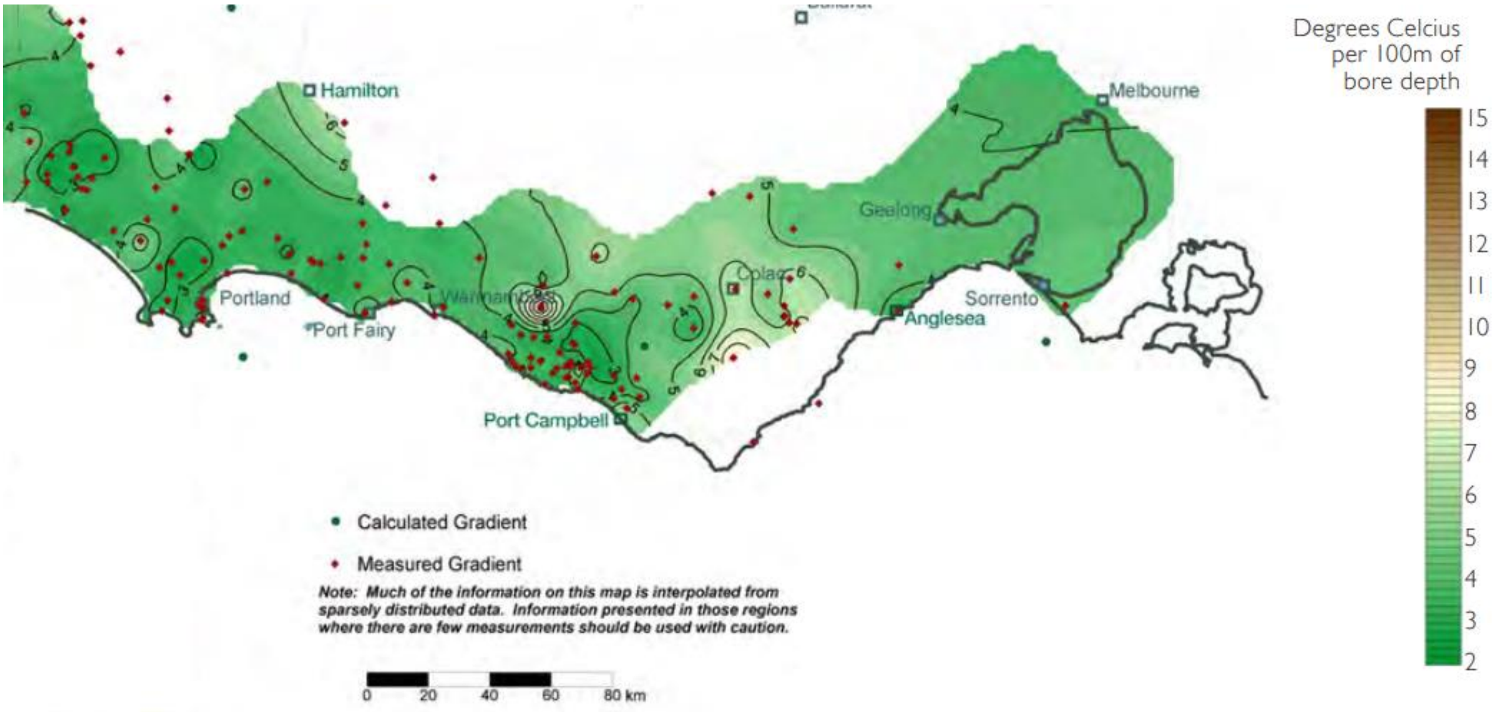
Dunkeld is an ideal location given the Royal Mail Hotel's fine dining experience and the strong synergies this has with a high-quality spa experience.

The geothermal spa experience could include a day spa, wellness centre and/or hot pools facility to support the venue being positioned as a holistic health and wellness location. It could also potentially be marketed as a venue for medical tourism to support those recuperating from medical procedures etc and staying (often with family) in nearby accommodation.

The CAPEX for this project is estimated at $7.5 million.

[44] Victoria's geothermal and natural mineral water tourism investment opportunities, page 15, https://www.vgls.vic.gov.au/client/en_AU/search/asset/1301664/0

Figure 35: Average geothermal temperature gradients in the Otway Basin[45]



[45] Ibid

8.1.3.5. 3.5-star branded business/leisure hotel, Ararat

Ararat is noted as a hub for business but currently struggles to attract strong overnight visitation because of a lack of accommodation it suffers from economic leakage.

The opportunity exists to investigate the development of a 3.5-star, 60-70 room branded accommodation property to cater to this business market, along with a leisure market looking for quality accommodation.

Council has identified a potential vacant and Council-owned site within the CBD (247 Barkly Street, see Figure 36) that could offer an ideal location for this property. This is close to major city assets and F&B providers.

Figure 36: Potential site for a 3.5-star business/leisure hotel

A branded property, such as a Quest or Ibis (see Figure 37), is suggested for several reasons, including the following.

- They bring with them existing databases of guests who often only stay in their brand of property and so they tend to achieve higher occupancy levels.
- They have strong marketing budgets that are not only used to market the property but also their respective town.
- They offer a stronger quality standard and are often required to reinvest regularly to ensure that the standard is maintained.
- Ararat does not currently have a branded property and there are very few available throughout the broader region.

The CAPEX for this project is estimated at $45 million.

Figure 37: Examples of similar size/scale and quality properties[46]

[46] Quest Griffith, NSW; Quest Cannon Hill, QLD

8.1.3.6. Dunkeld luxury units, Southern Grampians

The opportunity may exist to develop a small-scale luxury accommodation property at Dunkeld (or environs) to support a longer length of visitor stay in the region and to provide more accommodation offering for visitors to Dunkeld.

This is expected to increase as those walking the GPT end in this southern trailhead and need to be encouraged to stay in the region for longer and experience other attractions etc.

A chalet style of development may be appropriate which can also be added to over time if market demand is shown to justify this. there is currently very limited quality accommodation in the area other than units provided at the Royal Mail Hotel and in associated farm stay style accommodation offered.

The CAPEX for this project is estimated at $7 million-plus which includes the development of 8-10 chalets.

8.1.3.7. Destination holiday park, Horsham

Current market demand for powered caravan, RV and camping sites has outstripped supply throughout many locations Australia-wide. While there are some caravan and camping facilities in Horsham and the broader region, these are limited and are of a fairly basic standard. What is missing is a true destination holiday park (see Figure 38) that could offer circa:

- 15-25 eco cabins of a good standard.
- 50-70 powered camping and caravan/RV sites.
- Supporting family-friendly recreation facilities such as a high rope course, mini pump track, a water splash pad/swimming facility, mini-golf etc.

A destination holiday park in Horsham may be able to offer a ropes course, major kids playground, a pump track for bike riding etc. noting that the people who book into branded destination holiday parks will often expect these and other value adds for free

A new true destination holiday park would offer the potential for far more visitors to stay in Horsham than currently, and for a longer length of time as they could base themselves there. This is especially important to deliver a quality product to appeal more widely to not only the RV/caravan market but also the recent trends in family markets coming to explore the regional areas of Victoria.

A possible potential site has been identified within the grounds of the Horsham Golf Club and which is surplus to the Club's requirements. The golf club is keen to investigate options for leasing and/or selling the site to a quality destination holiday park developer/operator. We note, however, that there may be infrastructure-related site constraints that would need to be fully determined first.

The project is estimated to cost $18 million.

Figure 38: Destination Holiday Park Precedents[47]

[47] North Star Holiday Resort, NSW; Port Arthur Glamping, NRMA Port Arthur Holiday Park, TAS; BIG4 Yarra Valley Park Lane Holiday Parks, VIC; Macleay Valley Coast Holiday Parks, NSW; BIG4 Traralgon Park Lane Holiday Park, Latrobe Valley, VIC (x2);

8.1.3.8. 4-star hotel/resort with F&B at Halls Gap, Northern Grampians

The majority of accommodation typology for the visitor market in the region is currently limited to more traditional-style, 3-star motels, pub accommodation and small-scale B&Bs. Northern Grampians is missing a newer, higher-quality property to attract a higher-yielding market and to complement the stunning natural environment and GPT amenities.

A new, 4-star facility would fill a product gap in the marketplace and offer an accommodation option to both meet the needs of the family market now being seen in increasing numbers, along with the higher end RV and caravan niche market who regularly aim for a few nights out of their vehicles if the option of nice accommodation is available to them. There is also a regular business traveller market travelling through the region to offer government services and support, health, energy, teaching, and other forms of infrastructure services and with a budget allowance which allows them to stay at better quality facilities.

Though feasibility analysis is required, based on regional market demand and product gap assessments, a facility offering 40-50 units/rooms is potentially needed to meet current demand. Therefore, designing a facility that can include a potential stage two development extension when demand is shown for this, could be a prudent option.

There are several possible sites that could be considered, and Council is keen to work with potential developers and investors to ensure an optimum location is found.

The project is estimated to cost $45 million.

8.1.3.9. Waterway electric houseboats, Northern Grampians

The Grampians region offers several high-quality waterways. Many of these are underutilised as tourism assets and have the potential to play a far greater role in encouraging visitation to the region, providing that access to the water and required licenses from regulatory bodies are possible.

The introduction of electric houseboats onto one of the region's waterways will provide the region with a new joint attraction experience and unique accommodation typology while complementing the region's high-quality natural environment. Electric houseboats offer an alternative to fuel-powered boats and are far quieter, more efficient and far more environmentally friendly.

Lake Bellfield would appear to be well suited to this type of boating activity but further research would need to be undertaken with relevant government agencies to scope this out.

An estimated $5 million has been allocated to this project, which may enable the purchase and fitout of 6 electric houseboats catering for 4-6 people each.

Figure 39: Electric & solar houseboat precedents

8.1.3.10. Off-park lodge sites to link into the GPT, Southern Grampians

To bookend the GPT (in conjunction with the proposed Mount Zero resort at the Northern gateway to the GPT), the opportunity may exist for an off-park lodge at Dunkeld (or environs) to offer a southern accommodation anchor for the trail.

The lodge could comprise a 3-star eco-style property, with 20-30 rooms. It would offer GPT walkers a place to stay post-walk and also may offer the opportunity to allow shorter walks to be undertaken on the trail with walkers staying at the eco-style property.

The capex for this project is estimated at $15 million.

8.1.3.11. Indoor activity centre (rock climbing/bouldering), Northern Grampians

Aside from free outdoor activities, the region currently offers limited family-friendly activities, and virtually no indoor all-weather experiences (aside from galleries and museums).

Feedback indicated that while visitors love Halls Gap and its accessibility to Grampians (Gariwerd) National Park, there are limited things to do when the weather makes undertaking activities within the National Park problematic.

To leverage Halls Gap's profile as a recreational hub, the opportunity exists to investigate the development of an indoor activity centre which would not only provide an all-weather attraction, but also a year-round activity for visitors and locals to participate in during all seasons. This facility could offer rock climbing, bouldering, high ropes/aerial courses, trampolining etc.).

The ability to offer rock climbing could also potentially address some of the challenges associated with rock climbing in Grampians (Gariwerd) National Park by offering visitors and locals an alternative.

It could also offer an important training space for sportspeople when not in general use so may have several complementary user groups to appeal to.

The estimated CAPEX for this project is circa $8 million.

Figure 40: indoor activity centre precedents[48]

[48] Climbfit, Kirawee, Sydney; Swiss Mega Park, Frenkendorf, Switzerland; Chu Pea Park, Japan; Supaworld Hobart, Tasmania; Ninja 101, Sydney

8.1.3.12. Grampians Wine Discovery Centre, Regional (Location TBC)

The Grampians has a growing wine offering but struggles to compete with other, larger wine regions because of a lack of visible presence. The success of the Grampians Grape Escape is a testament to the quality of the wine offered in the region.

Many vineyards and winemakers nationwide indicate they are keen to explore tourism uses on-site but are challenged by issues including insurance, finding sufficient staff and biosecurity issues. This is particularly the case for more boutique producers.

To help overcome this, the potential exists to develop a regional wine (and potentially produce) showcase centre (or emporium). This could feature the region's vineyards, offer a shopfront for these vineyards and, potentially, on a rotating basis, offer tastings. To help with project commercial viability, it is suggested that this may commence as a pop-up and seasonal facility, until such time that it can be a permanent facility with secure funding streams.

Because of the strength of some of the food producers/growers in the region (olives etc), the potential also exists to investigate including them in the discovery centre.

The project is estimated to cost circa $18 million, although a pop-up version would come at a significantly lower capital cost.

Figure 41: Wine and produce emporium precedents[49]

[49] Paesanella Food Emporium, Marrickville, NSW; National Wine Centre, Adelaide, SA; Pialligo Food Emporium, Canberra, ACT

8.1.3.13. Glamping pods, Ararat

Potential exists to develop a quality upmarket glamping facility with a suggestion of up to 12 glamping tents. The region has some magnificent landscapes which provide unique environments for positioning a glamping operation.

Council is keen to work with suitably skilled operators and developers to find locations and work through ways of ensuring that highly sustainable environmental infrastructure can be provided to allow for a glamping camp to be introduced in a suitable quality location.

Because of seasonal weather patterns, it would likely require a robust and all-weather style of glamping tent rather than a more lightweight sub-tropical style of amenity.

Based on comparative examples, the likely capital cost is thought to be circa $6.5m (including glamping tents, supporting back of house facilities and dining etc.).

Figure 42: Glamping Precedents[50]

[50] Paperbark Camp, Jervis Bay, NSW; Nightfall Camp, near Lamington National Park, QLD; Wildman Wilderness Lodge, Mary River National Park, NT; Bubble Tents, Mudgee, NSW; Truffle Lodge, Gretna, TAS

8.1.3.14. Restaurant & function centre on river-edge, Horsham

Horsham Rural City Council has developed a River to City Masterplan which plans for the long-term future of the Wimmera River Precinct and the Central Activities District. The Masterplan aims to transform and revitalise the area to make it a more attractive place to live, work, visit and invest in.

As part of the Masterplan, the potential for a riverfront restaurant is identified, along with an event/function facility. The facility could offer a valuable asset to support a large regional catchment area noting that some existing facilities in the region are smaller and older now. The venue could also be able to support a wedding and family function market along with the broader business and meetings market.

The CAPEX for this project is estimated at $8 million, though this is likely to vary depending on the size/scale of facility developed.

Figure 43: Horsham River to City Masterplan

8.1.3.15. Tourism aviation activity (scenic flights, gliding, pax services), Horsham

Horsham Rural City Council is keen to further activate the Horsham Aerodrome. To achieve this could include investigating the introduction of tourism-based recreational aviation experiences. This includes, but is not limited to, the following:

- scenic flights;
- gliding and training;
- paragliding;
- parachuting;
- light aircraft training school;
- Microlights; and
- potentially a hub for visitation by light aircraft visitors (flying in) needing parking for aircraft, refuelling and basic maintenance.

The airfield already supports key uses such as the rural fire service, medical flights, and a limited business market. Being slightly further away from more alpine terrain is also likely to assist with encouraging various tourism aviation experiences as noted above.

The aerodrome already has several private businesses operating from it with the potential to consider relocating existing businesses and establishing more industrial park style facilities on this site, rather than within the Horsham CBD.

The tourism aviation experiences alone are likely to require investment by operators of circa $1.4 million.

Figure 44: Horsham Aerodrome

8.2. Public Investment Opportunities

The public investment opportunities, comprising those that are likely to help facilitate private investment (i.e., public enablers for private investment) and public investment opportunities in infrastructure, events and programs, have been identified and prioritised with the assistance of the PCG.

Due to the nature of public investment initiatives (many of which take place because of the risk of market failure, to support private investment and/or to achieve non-quantitative social, community, environmental and cultural benefits), a different methodology has been applied to rank these projects. Once the initiatives were identified, a survey was distributed to the PCG to rank their top three infrastructure (with two separate questions – one for public enablers for private investment and the other for public infrastructure) within their local government area (or broader regional priorities for non-council members). The survey produced a weighted average and projects were then ranked based on this.

While these projects are not the focus of a tourism investment prospectus (which is geared at generating private investment), these are important projects and many are needed to continue to encourage private investment to occur in the region. Some projects have already been identified by the government (local and state) and are being pursued by their respective parties.

8.2.1. Public enablers for private investment

Table 19 demonstrates the outcomes of the ranking of the public enablers for private investment opportunities. The top five projects are:

- Lake Bellfield improvements
- Implementation of Volcanic Trail Masterplan
- Grampians wine discovery centre
- Brambuk upgrade
- Airport site redevelopment (tourism product)

Table 19: Public enablers for private investment project ranking

Project Name	Area	Project Category	Est. CAPEX	Est. Private	Est. Public	Survey Score	Rank
Lake Bellfield amenity improvement	Northern Grampians	infrastructure	$5,000,000	$0	$5,000,000	18	1
Implementation of Volcanic Trail Masterplan	Southern Grampians	Attraction/experience	$9,250,000	$0	$9,250,000	18	1
Brambuk upgrade	Northern Grampians	Attraction/experience	$7,000,000	$0	$7,000,000	18	1
Lookout/viewing area development and upgrades	Regional	Infrastructure	$2,000,000	$0	$2,000,000	17	4
F&B upskilling and training programme	Regional	Training	$40,000	$4,000	$36,000	17	4
Dunkeld visitor hub	Southern Grampians	infrastructure	$1,500,000	$375,000	$1,125,000	17	4
Activation of City to River Masterplan with event	Horsham	Event	$200,000	$30,000	$170,000	17	4
Mobile and digital connectivity improvements	Regional	infrastructure	$1,000,000	$0	$1,000,000	17	8
Signage audit & upgrades (directional & interpretive)	Regional	Infrastructure	$100,000	$0	$100,000	16	9
GPT staged trek separation (2-3 night blocks)	Northern Grampians	Attraction/experience	$1,000,000	$0	$1,000,000	16	9
Wildlife habitat & cultural education center	Ararat	Attraction/experience	$18,000,000	$2,700,000	$15,300,000	0	11
Roading upgrades	Regional	Infrastructure	$100,000,000	$0	$100,000,000	0	11
Peak season public transport for tourists	Horsham	Transport	$150,000	$0	$150,000	0	11
Halls Gap wayfinding	Northern Grampians	infrastructure	$250,000	$0	$250,000	0	11
Destination branding for the Grampians and sub-regions	Regional	Marketing	$120,000	$0	$120,000	0	11
Grand Total			$145,610,000	$3,109,000	$142,501,000		

8.2.2. Public funding opportunities in infrastructure, events, and programs

Table 20 demonstrates the outcomes of the ranking of the public funding opportunities in infrastructure, events, and programs. The top five projects are:

- Wimmera River Discovery Trail Stage 2 (Horsham to Dimboola)
- New Hamilton Art Gallery project
- Heath Street upgrades & bridge
- Halls Gap walking loop
- Ararat Trails Mountain Bike Park

Table 20: Public funding opportunities in infrastructure, events, and programs project ranking

Project Name	Area	Project Category	Est. CAPEX	Est. Private	Est. Public	Survey Score	Rank
Wimmera River Discovery Trail Stage 2 (Horhsam to Di..	Horsham	Attraction/experience	$2,000,000	$0	$2,000,000	41	1
New Hamilton Art Gallery project	Southern Grampians	Attraction/experience	$4,000,000	$0	$4,000,000	41	1
Heath Street upgrades & bridge	Northern Grampians	infrastructure	$25,000,000	$0	$25,000,000	41	1
Halls Gap walking loop	Northern Grampians	Attraction/experience	$500,000	$0	$500,000	41	1
Ararat Trails Mountain Bike Park	Ararat	Attraction/experience	$2,200,000	$0	$2,200,000	41	1
Additional child-friendly infrastructure (family market)	Horsham	Attraction/experience	$500,000	$0	$500,000	41	6
Hamilton Botanic Garden playspace	Southern Grampians	Attraction/experience	$1,500,000	$0	$1,500,000	40	7
Grampians tasting trail	Ararat	Attraction/experience	$100,000	$0	$100,000	40	7
Annual sound and light show with story telling	Northern Grampians	Attraction/experience	$350,000	$70,000	$280,000	40	7
Visitor dispersal strategy throughout GNP	Northern Grampians	Attraction/experience	$250,000	$0	$250,000	40	10
Enhanced facilities & shuttle bus service into Mackenzi..	Northern Grampians	Attraction/experience	$250,000	$0	$250,000	40	10
Telling the story of gold fields, linking with the current..	Northern Grampians	Attraction/experience	$6,500,000	$3,575,000	$2,925,000	39	12
Sawyer Park soundshell upgrade	Horsham	infrastructure	$1,500,000	$0	$1,500,000	39	12
Landscaping & general urban enhancements	Regional	infrastructure	$5,000,000	$0	$5,000,000	39	12
Development of multi-use trails	Southern Grampians	Attraction/experience	$5,200,000	$0	$5,200,000	39	12
Wimmera River precinct water play area	Horsham	Attraction/experience	$1,000,000	$0	$1,000,000	0	16
Stawell Underground Physics Laboratory Stage 2	Northern Grampians	Attraction/experience	$6,500,000	$0	$6,500,000	0	16
Stawell Gift Race enhancements (e.g. woman's event)	Northern Grampians	Event	$95,000	$0	$95,000	0	16
St Arnaud Mural Trail at the Raillery Hub	Northern Grampians	Attraction/experience	$250,000	$0	$250,000	0	16
Solar car events	Northern Grampians	Attraction/experience	$200,000	$0	$200,000	0	16
Regional indoor sports precinct	Horsham	infrastructure	$15,000,000	$0	$15,000,000	0	16
Queen Mary Botanic Gardens heritage precinct	Northern Grampians	Attraction/experience	$500,000	$0	$500,000	0	16
Public toilet upgrades and enhancements	Regional	Infrastructure	$2,000,000	$0	$2,000,000	0	16
Outdoor multi-purpose sports precinct	Horsham	infrastructure	$15,000,000	$0	$15,000,000	0	16
New Grampians destination food event	Southern Grampians	Event	$200,000	$0	$200,000	0	16
Napier Street retail facade upgrades	Northern Grampians	Attraction/experience	$500,000	$50,000	$450,000	0	16
Major regional sports carnival event (netball)	Northern Grampians	Event	$140,000	$0	$140,000	0	16
Improved walkability	Northern Grampians	infrastructure	$500,000	$0	$500,000	0	16
Horsham public art and indigenous interpretation	Horsham	Attraction/experience	$400,000	$0	$400,000	0	16
Halls Gap southern gateway	Northern Grampians	infrastructure	$15,000,000	$0	$15,000,000	0	16
Great Western Wine Cycle Trail	Northern Grampians	Attraction/experience	$200,000	$0	$200,000	0	16
Great Trail development	Northern Grampians	Attraction/experience	$500,000	$0	$500,000	0	16
Grampians triathlon event	Northern Grampians	Event	$200,000	$0	$200,000	0	16
Grampians Tourism Region Road Cycling Granfondo Ev..	Northern Grampians, A..	Event	$200,000	$0	$200,000	0	16
F&B roster development	Regional	Training	$10,000	$1,000	$9,000	0	16
F&B and tourism operator ATDW awareness program ..	Regional	Training	$20,000	$2,000	$18,000	0	16
Extreme sports skills development & training facility	Northern Grampians	Attraction/experience	$4,500,000	$675,000	$3,825,000	0	16
Car and motor bike hill climb (enhancement of existin..	Ararat	Event	$250,000	$125,000	$125,000	0	16
Ararat Dirt Mtn Bike 12 Hr Race	Ararat	Event	$200,000	$0	$200,000	0	16
Grand Total			$118,215,000	$4,498,000	$113,717,000		

9. ENCOURAGING INVESTMENT

9.1. Mechanisms to Encourage Investment

Investment is essential to build and maintain a competitive edge and a stronger visitor economy based. The higher-risk nature of tourism investment means that there is often a need to help de-risk investment into the sector. This is particularly the case with mid-to larger-scale accommodation development because of the inability to easily cash flow the development (when compared with owner-occupied apartments and residential development which can be sold off the plan in advance to help better manage project financing risk).

There are a plethora of inducements/incentives which can be considered to stimulate investment and reinvestment into commercial accommodation and tourism experiences/attractions.

These can be broadly categorised as "non-financial incentives" and "financial incentives" and they vary regarding:

1. which level of government (local, state, and federal) and/or which stakeholder is able to introduce them; and
2. at which stage in the development process they can be applied.

Table 21 provides a summary of these incentives. It is important to note that a range of inducements/incentives have been listed based on examples from various destinations nationally and globally.

Effecting such changes at a state and federal government level is seen as more challenging than at a local government level. This is primarily because local government can often determine change on a project-by-project basis, while the state and the federal government must consider offering the same type of incentive to all similar projects.

Table 21: Summary of mechanisms to incentivise development/reinvestment

Stakeholders who can effect change:
◆ Federal Government ■ State Government ● Local Government ▲ Other

Non-financial Incentives	Floor space bonuses & height incentives	●
Non-financial Incentives	Release of Crown land for tourism development	● ■ ◆
Non-financial Incentives	Mixed-use development schemes	● ■
Non-financial Incentives	Exclusive zoning for tourism developments	● ■
Non-financial Incentives	Reduction in accessible room requirements for hotels etc. under 15 rooms	●
Non-financial Incentives	Planning & Process Support	● ▲
Financial Incentives	Tax exemptions/ concessions	■
Financial Incentives	Accelerated depreciation allowance for hotels etc.	■
Financial Incentives	Assisting with access to utility supply	● ■
Financial Incentives	Government-subsidised loans	■ ◆
Financial Incentives	Income guarantee by operators	▲
Financial Incentives	Purchase of land and concessions on long term ground leases	● ■
Financial Incentives	Incentives for heritage conversion to tourism use	● ■
Financial Incentives	Direct Government Investment	● ■ ◆

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9.2. Best Practice Guidelines

The following are offered to help the region find ways to “tilt the playing field” and achieve the desired mix of commercial accommodation and attractions/experiences going forward to enable it to grow its visitor economy.

1. Positive government intervention to support destination aspirations	2. Effective dialogue between the commercial accommodation and attractions sector, RTO, LTOs, councils and State Government	3. More effective inter-departmental decision making for tourism development	4. Finding suitable land in areas appropriate for new commercial accommodation and attractions/experiences
5. Tilting the playing field by offering upfront concessions and support to stimulate investment	6. Clustering tourism development into nodes, hubs, and precincts along with other forms of tourism development	7. Having alternative forms of transport (airlines, coach, rail, and private vehicle use) to access a destination	

1. Positive government intervention is going to be particularly needed in the interim and future post-COVID-19 environment to support destination aspirations for the region. Assuming market forces alone will lead to new investment into tourism attractions/experiences and commercial accommodation development occurring and the refurbishment/potential expansion of existing facilities is unlikely. If no government intervention occurs, then the region risks at best, treading water and, at worst, finding its visitor economies contracting.

2. Effective dialogue between the commercial accommodation sector, tourism experiences/attractions sector, RTO, LTOs, councils and state government is required. A collective approach is required for the region.

3. More effective inter-departmental decision making for tourism development within councils and between State Government agencies is required. Industry feedback (and confidential feedback from some councils) indicates the challenge in decision making between council town and strategic planning staff on the one side, and economic development and tourism staff on the other. There appears to be a lack of adequate understanding of how and why tourism development could and should be viewed as an appropriate use in areas where they are not noted in LEPs as a desired or priority use.

4. Finding suitable land in areas appropriate for new commercial accommodation is critical which is more likely going to require:

- The state government agreeing to find appropriate parcels of land for specific forms of commercial accommodation which can be leased long term, and which will support the local visitor economy and improved sustainability principles.
- Councils reassessing zoning within LEPs and DCPs to allow for greater flexibility to consider preferred forms of commercial accommodation.

5. Being prepared to tilt the playing field by offering upfront concessions and support to stimulate investment. It has been identified that there is a need to encourage higher quality commercial accommodation development especially to help encourage a higher-yielding visitor market and to use this to leverage the potential for additional higher quality food and beverage outlets in their LGA. There are numerous ways councils especially can help proactively encourage new forms of commercial accommodation. It is particularly important to help de-risk projects for a developer (where possible) as without high existing occupancy rates being achieved along with stronger achieved average room rates, the risk to a developer/investor and operator is higher.

6. Clustering tourism development into nodes, hubs, and precincts along with other forms of tourism development often provides the opportunity to help leverage one another and creates a unified focus.

7. Having alternative forms of transport (airlines, coach, rail, and private vehicle use) to access a destination are important. If one wants to grow beyond the self-drive market which is the significant predominant transport use for the region, offering alternative forms of transport services is important, especially as many visitor markets are time poor and do not want to lose time getting to and from the destination.

10. APPENDICES

Appendix 1 Documents Referenced

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Appendix 2 Visitation Data

LGA	Visitor Type	Data Type	Motivation	2013	2016	2019	2021
Ararat	Domestic Day	Trips	Business	32,742	7,945	36,912	14,840
			Holiday	46,229	40,214	64,430	26,315
			Other	5,997	25,448	28,380	11,044
			VFR	31,521	49,067	63,995	29,451
	Domestic Overnight	Nights	Business	22,176	47,736	98,767	50,581
			Holiday	81,162	76,688	96,023	46,950
			Other	12,438	9,780	12,812	8,616
			VFR	66,335	72,417	54,878	71,690
		Trips	Business	11,356	21,178	33,424	16,215
			Holiday	30,999	28,541	44,571	19,475
			Other	3,528	3,109	6,004	7,807
			VFR	22,735	29,963	35,654	18,226
	International Overnight	Nights	Business	277	12,134	27,464	0
			Holiday	7,170	42,843	12,990	407
			Other	2,153	0	105	0
			VFR	9,976	3,359	8,525	7,895
		Trips	Business	277	331	213	0
			Holiday	876	861	667	407
			Other	208	0	53	0
			VFR	735	856	459	489
Grampians Region	Domestic Day	Trips	Business	110,355	82,134	139,381	94,138
			Holiday	226,899	366,506	433,391	318,446
			Other	86,439	165,406	134,099	105,243
			VFR	160,115	135,077	218,905	123,634
	Domestic Overnight	Nights	Business	143,490	169,766	311,681	244,440
			Holiday	634,690	688,291	785,787	684,333
			Other	44,884	107,707	111,733	110,500
			VFR	425,354	475,279	536,230	422,954
		Trips	Business	81,698	86,328	132,175	88,389
			Holiday	221,302	271,590	317,849	240,970
			Other	26,693	40,671	52,430	47,060
			VFR	152,244	161,236	224,540	150,801
	International Overnight	Nights	Business	29,873	14,455	45,119	3,100
			Holiday	84,308	140,343	180,689	39,239
			Other	4,206	857	3,257	934
			VFR	55,796	34,643	40,421	43,467
		Trips	Business	1,327	885	1,120	423
			Holiday	25,423	35,308	44,435	14,452
			Other	495	106	408	78
			VFR	3,705	3,892	2,658	1,450
Horsham	Domestic Day	Trips	Business	35,668	40,518	37,098	29,456
			Holiday	61,453	110,986	203,434	111,605
			Other	44,417	61,498	49,381	73,790
			VFR	31,387	27,042	81,474	60,981
	Domestic Overnight	Nights	Business	45,307	49,840	84,521	95,487
			Holiday	162,175	118,485	169,875	151,760
			Other	15,306	59,457	35,780	28,234
			VFR	159,251	160,330	206,213	128,164
		Trips	Business	25,949	32,767	45,216	34,279
			Holiday	50,550	53,013	73,540	49,547
			Other	10,876	25,739	19,741	20,578
			VFR	52,710	50,529	77,813	49,778
	International Overnight	Nights	Business	2,049	1,881	8,624	107
			Holiday	8,651	29,916	42,225	13,755
			Other	120	192	150	0
			VFR	17,952	6,936	3,773	3,464
		Trips	Business	282	421	481	53
			Holiday	2,507	2,681	2,558	796
			Other	120	43	150	0
			VFR	1,356	886	797	112
Northern Grampians	Domestic Day	Trips	Business	19,159	15,406	27,031	27,354
			Holiday	76,378	147,899	63,661	103,452
			Other	22,932	23,823	15,455	7,640
			VFR	37,069	28,576	35,419	23,756
	Domestic Overnight	Nights	Business	41,644	39,988	53,195	56,946
			Holiday	326,176	349,621	374,826	393,243
			Other	5,298	8,797	20,658	43,795
			VFR	97,945	82,893	117,991	107,759
		Trips	Business	19,876	17,336	20,965	16,686
			Holiday	114,413	136,584	147,994	146,482
			Other	3,872	5,107	15,003	7,917
			VFR	39,707	36,629	50,440	51,703
	International Overnight	Nights	Business	2,053	50	8,765	233
			Holiday	23,308	24,913	58,687	9,769
			Other	0	666	529	33
			VFR	12,853	2,131	11,063	364
		Trips	Business	220	50	425	233
			Holiday	11,794	13,492	19,519	5,759
			Other	0	63	128	33
			VFR	663	575	619	167
Southern Grampians	Domestic Day	Trips	Business	22,786	18,264	38,340	22,488
			Holiday	42,839	67,407	101,866	77,073
			Other	13,093	54,638	40,883	12,770
			VFR	60,138	30,392	38,017	9,446
	Domestic Overnight	Nights	Business	34,363	32,202	75,199	41,427
			Holiday	65,179	143,497	145,063	92,380
			Other	11,842	29,673	42,483	29,853
			VFR	101,822	159,640	157,147	115,341
		Trips	Business	25,467	17,535	36,837	22,651
			Holiday	34,509	61,175	64,097	36,411
			Other	8,758	9,022	12,825	11,953
			VFR	38,438	44,985	62,037	31,094
	International Overnight	Nights	Business	18,316	30	0	2,496
			Holiday	18,160	6,599	12,074	2,287
			Other	1,763	0	2,435	901
			VFR	4,062	21,485	16,139	31,160
		Trips	Business	574	30	0	83
			Holiday	2,095	3,579	1,928	1,062
			Other	134	0	44	45
			VFR	739	1,500	563	578


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CONTENTS

WELCOME TO THE GRAMPIANS

It is with great excitement that Grampians Tourism presents this Investment Prospectus, which has been a collaborative effort by many agencies to showcase the potential of the whole region. I sincerely believe the Grampians is ripe for the greatest tourism development opportunities throughout Australia with its world-class natural environment and rich indigenous culture.

Grampians Tourism is the key organisation helping promote the region and assisting businesses to build a world-class experience for travellers. We believe that once people have visited, they will be amazed by the huge number of attractions with an extensive list of sensational destinations.

Our visitor's wonderful experiences and strong word-of-mouth endorsement for the Grampians region can be felt and seen almost daily.

At Grampians Tourism we have a passion and vision for what can be achieved with the right partners promoting a truly unique experience set in some of the most picturesque landscapes throughout Australia.

David Jochinke
Chair,
Grampians Tourism Board Inc.

The Grampians is a vibrant destination and with a well-established profile, strong visitation and highly supportive local and state government partners, the Grampians is a great place to do business.

The Grampians region includes the Ararat, Horsham, Northern Grampians and Southern Grampians local government areas and with over $250 million worth of current and future tourism investment projects underway, now is the perfect time to invest in our destination.

The recent $33 million state and federal government investment into the Grampians Peaks Trail attracts opportunities to the region well beyond the walk itself and is an important economic and tourism development for the local community, the wider region, and for Victoria as a key nature-based tourism destination.

Overnight visitation is also forecast to double over the next 10 years and this investment prospectus highlights a variety of investment opportunities to consider which cut across all four local government areas, plus offer a variety of investment levels as well.

If looking to invest, you will find a region that is open for business and takes a very proactive approach to supporting investment and development.

Marc Sleeman
Chief Executive Officer,
Grampians Tourism Board Inc.

Acknowledgement of Country

Grampians Tourism acknowledges the traditional owners, Djab Wurrung, Jardwadjali and neighbouring First Peoples, who are the traditional custodians of the area where friends and family visit to enjoy everything the Grampians region has to see and do. We respect their history, culture and Elders, past and present, and their continuous connection to Country.

REGIONAL LOCATION MAP

The Grampians region is well serviced by major highways, whether travelling from Melbourne, Adelaide or the Great Ocean Road.

Melbourne to Ararat — 2 hours

Melbourne to Halls Gap — 3 hours

Melbourne to Hamilton, via Dunkeld — 3.5 hours

Melbourne to Horsham — 3.5 hours

Adelaide to Horsham — 4.5 hours

Adelaide to Hamilton — 5.5 hours

Twelve Apostles to Dunkeld — 2 hours

A GREAT PLACE TO INVEST

Local government plays a central role in the achievement of successful outcomes for tourism investors

The Grampians region includes the local government areas of Ararat, Horsham, Northern Grampians and Southern Grampians. Each of these Councils is highly supportive of tourism development and investment and has partnered in the development of this prospectus. A variety of key State Government agencies have also been major contributors to this document as they continue to support strong investment in enabling infrastructure.

Councils across the region have economic development specialists who are responsible for facilitating investment, and local government performs a key role in providing information that will assist in the preparation of the concept and later, approval of the project. Each of the Grampians' local government partners can provide:

- Potential development sites and facilitate a connection with existing landholders
- Assistance with navigating the planning and approval process
- Statistics on development
- Information on new projects in the pipeline
- Advice on areas where certain investment opportunities are being promoted
- Employment profiles
- Demographic information
- Real estate information, and
- Contacts in state or regional agencies where further useful information and financial assistance may be obtained.

Alignment with State Government's key priorities

The Grampians has developed a significant destination profile through its values for nature-based and adventure activities. Visitors can experience a range of outdoor pursuits in the renowned Grampians (Gariwerd) National Park which covers 170,000 hectares at the western end of the Great Dividing Range. Within the Park are a diverse collection of plants and wildlife, walking tracks including the Grampians Peaks Trail, lookouts offering incredible panoramic views, waterfalls, lakes and forests. It's also a spiritual place rich in creation stories, sacred sites and central to the dreaming of its peoples. As outlined in the Visitor Economy Recovery & Reform Plan (VERRP), two key experience pillars that provide significant opportunities for growth are nature-based and First Peoples-led experiences. As main drivers of visitation, the Grampians region directly aligns with the State Government's key priorities.

There are many reasons to consider investing in the Grampians including:

- **A growing visitor economy.** Pre-COVID-19, visitation increased by 55% with an additional 600,000 visitors between 2013 and 2019. Between 2022 and 2033, travel to the Grampians is anticipated to grow by over 679,000 visitors.
- **Tourism is an extremely important sector** for the Grampians — it delivers over $560 of visitor spend every minute of every day and accounts for almost 4% of jobs as well as 2% of total output. The sector is forecast to offer significant growth potential.
- **Solid economic growth** and an increased desire to diversify the economy to pick up on global trends in tourism, tech and innovation. The region has a strong appetite for investment and growth from its visitor economy, widely supported by all key partners.
- **Ideally located as a mid-way point between Melbourne and Adelaide**, the Grampians attracts a large self-drive market between these two cities and via the Great Ocean Road. This supports a greater length of visitor stay and higher spend on accommodation, attractions and retail.
- **Proximity to metro Melbourne**, which is the fastest-growing capital city in Australia. Around 55% of Melburnians have not been on an overnight trip to regional Victoria providing an opportunity for considerable growth.
- **First-rate utility services** including electricity, water, gas, wastewater management solutions and NBN connection to support new developments.
- **A diverse business community** including vibrant and varied businesses to support all sectors of the visitor economy such as business, leisure, special interest, education, visiting friends and relatives, and other forms of visitation.
- **A great lifestyle.** There is something for everyone with excellent recreational, cultural and sporting facilities and events, natural attractions, a range of dining options, shopping facilities, and high-quality education and healthcare services.

KEY SECTORS

The Grampians is the ideal place to do business in tourism. It has a well-established profile, strong domestic visitation, access to skilled employees and highly supportive local and state government partners.

Major industry sectors that contribute to the region's economy include:

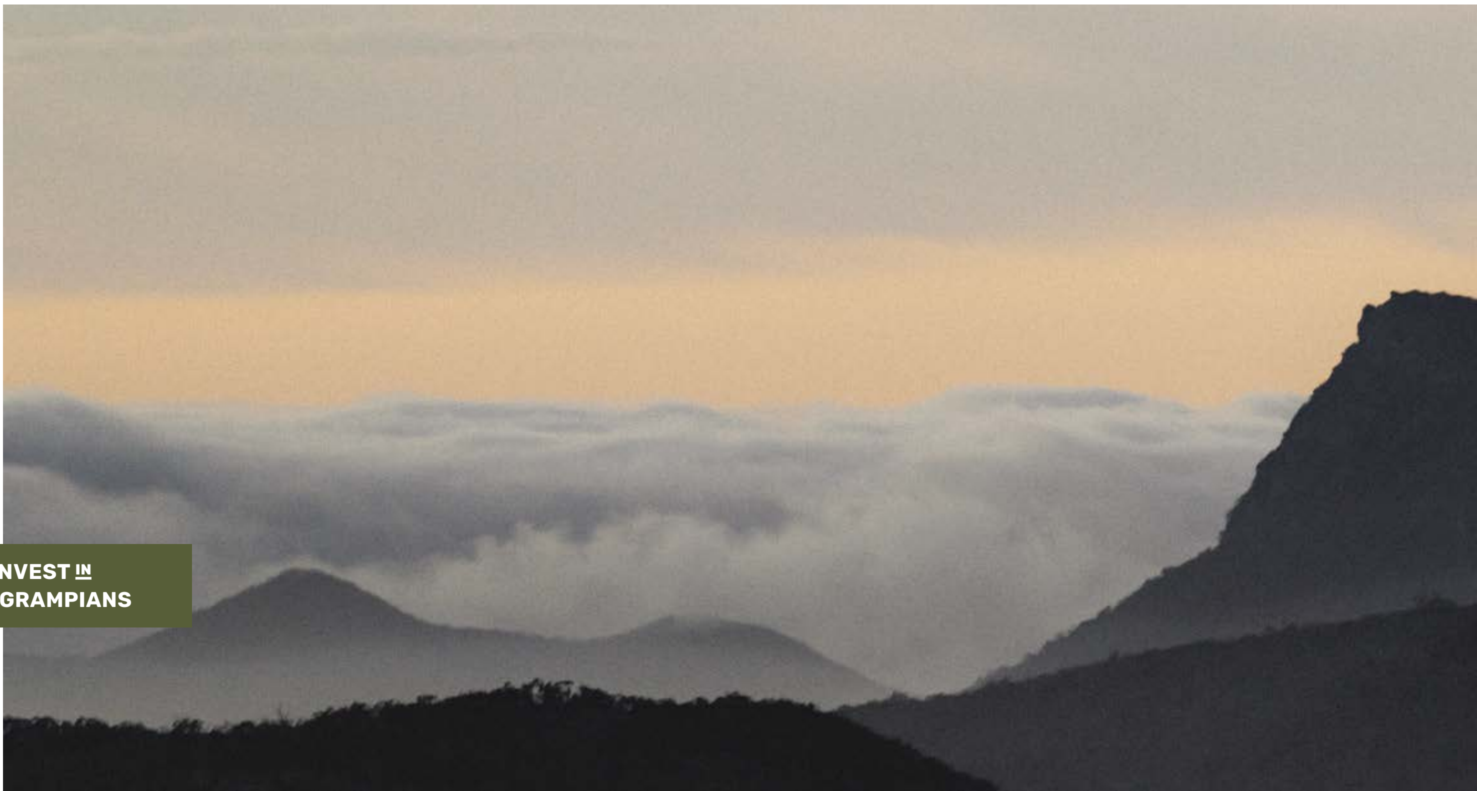
- Tourism
- Manufacturing
- Construction
- Agriculture
- Healthcare
- Public Administration and Safety
- Education and Training
- Professional Services

The agricultural sector continues to be a major employment generator and economic driver. The sector is supported by the region's fertile soils and regular, reliable rainfall. The main items produced by the region include wool, broad acre grazing, cereal cropping, viticulture and olive growing. There exist significant opportunities to leverage the region's agricultural profile and develop agritourism experiences which complement the current nature-based recreational focus of the region.

The Grampians' broad spectrum of industries, as indicated above, consolidate as a secure base for a thriving economy and facilitates powerful networking and collaborative opportunities. It also means that there are significant value-add opportunities for the tourism sector to leverage.

The recent (and ongoing) significant investment by the Victorian State and Federal Government in the Grampians Peaks Trail of over $33m reflects the desire on the part of Government to continue to strengthen the visitor economy and also reflects its faith in the growth potential of the region. This is expected to help stimulate demand for new guided tourism experiences along with accommodation in surrounding areas to support a longer length of stay.

In addition to the above, the Victorian Government has also provided $19m in funding for flagship projects in the Grampians, investing further in GPT trailheads in each LGA, upgrading facilities at MacKenzie Falls and with the revitalisation of Brambuk — The National Park and Cultural Centre. As illustrated in this Investment Prospectus, there are a variety of investment opportunities to consider which cut across all sectors of the regional visitor economy, are located throughout the four local government areas, plus offer a variety of investment levels as well.



OUR COMPETITIVE ADVANTAGE

With collaborative Councils and a supportive community, there has never been a better time to invest in the Grampians.

Strong strategic regional connectivity

Via the Western and Glenelg Highways to South Australia and the Great Ocean Road.

Proximity to the fastest growing capital city

Melbourne is just 2.5 hours away and 55% of Melburnians have not been on an overnight trip to regional Victoria.

Enviable lifestyle with a growing number of tree changers

Supported by quality community amenities and infrastructure.

Strong domestic visitor market

This meant that COVID-19 impacts were smaller than for many other destinations nationwide.

Well positioned to leverage the State Government's key experience pillars

Of nature-based and First Peoples' led experiences. The Grampians is a playground for outdoor adventurers and has a fascinating Aboriginal story to tell.

Ongoing public investment

To support tourism growth including the Grampians Peaks Trail, MacKenzie Falls, Brambuk — The National Park & Cultural Centre, Ararat Hills Mountain Bike Trail Project, the Dunkeld Visitor Hub which includes the Penshurst Volcanoes Discovery Centre, and activation of the Wimmera River and Bike Trail from Horsham to Natimuk.

Access to an educated and skilled workforce

62% of residents have a certificate qualification or higher.

National and international reputation of the Grampians Peaks Trail

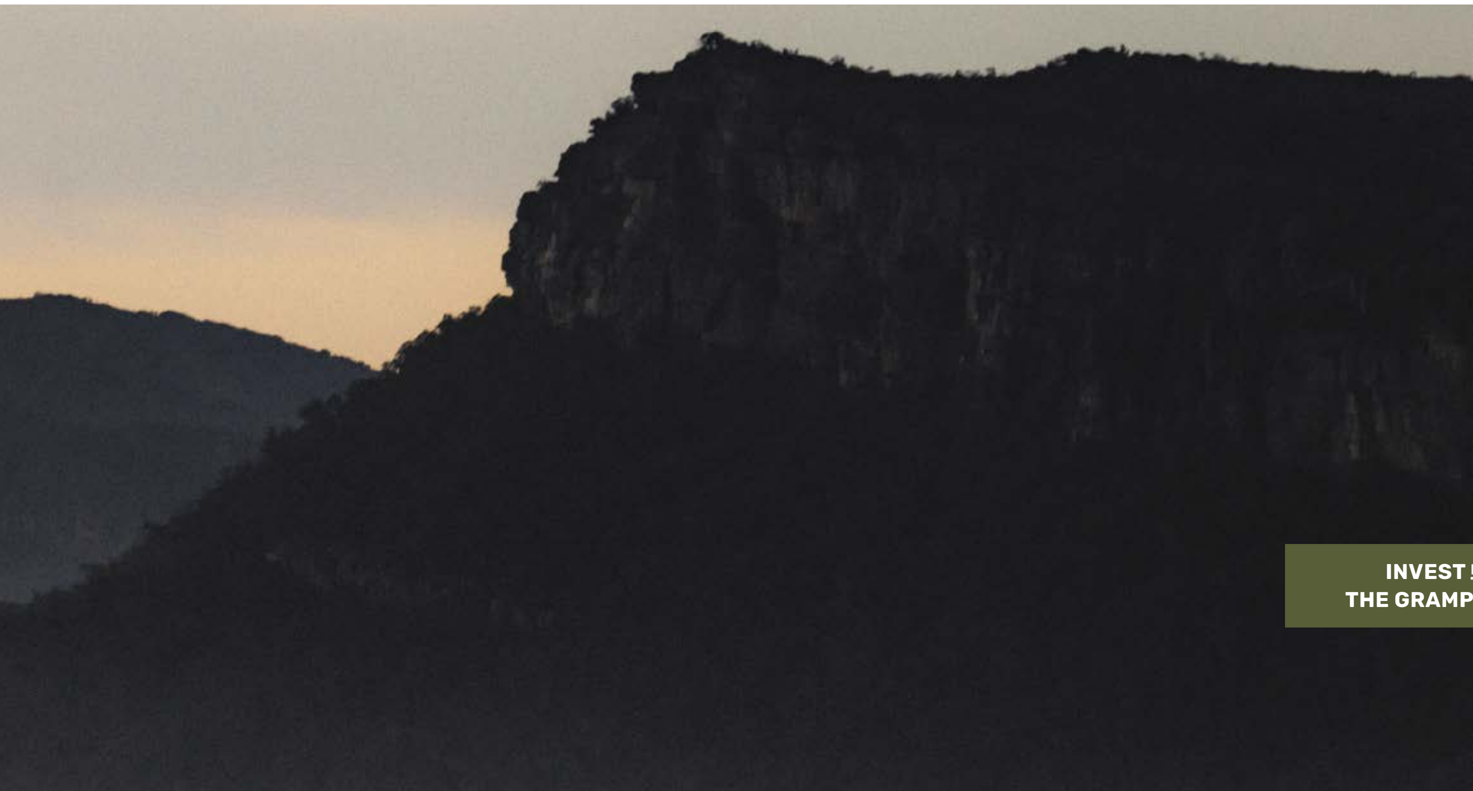
GPT is quickly becoming one of Australia's signature great walks.

Economic diversity

Building on the strength of the agricultural and tourism sectors and leveraging these across the broader economy.

Strong support from Councils

Who work collaboratively to support and facilitate investment.



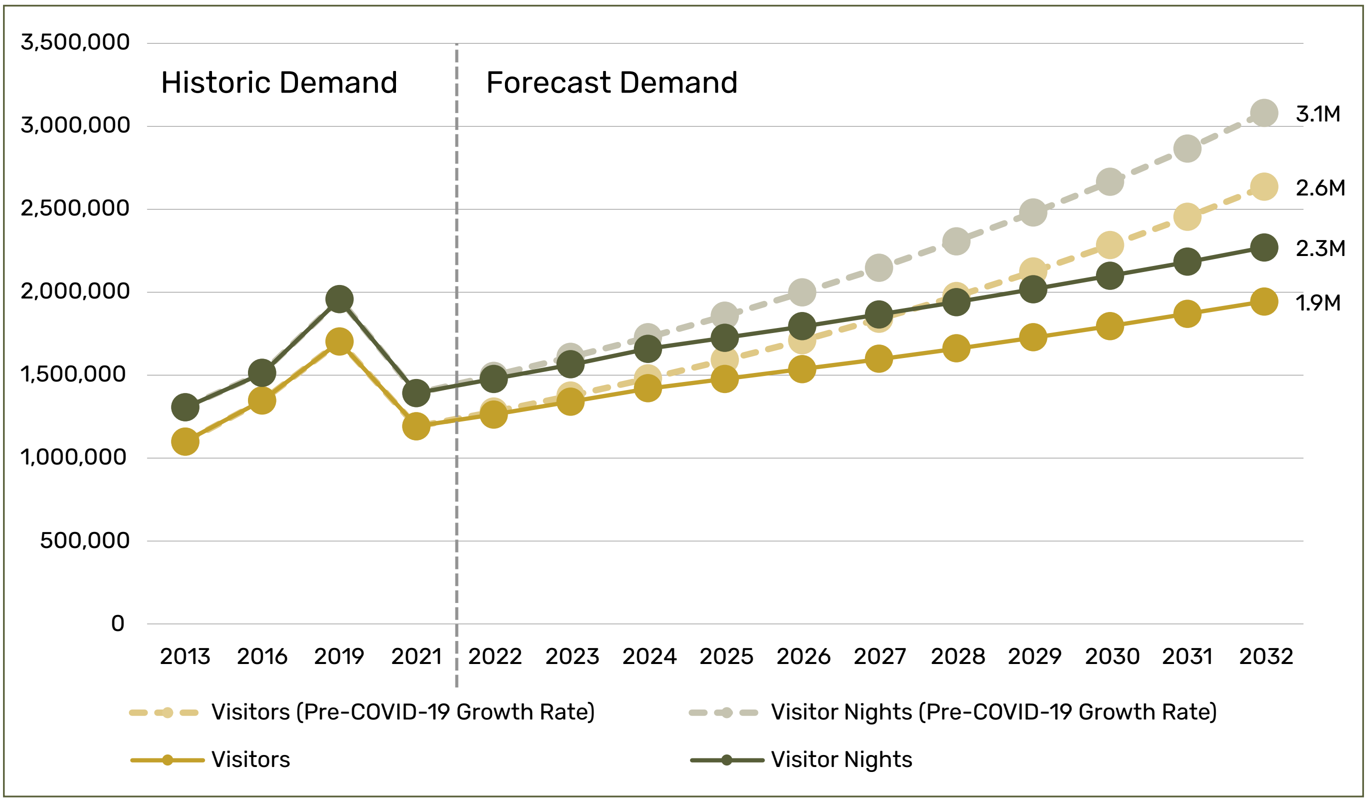
VISITATION IS GROWING

Prior to COVID-19, visitation to the Grampians was growing, with a strong compound annual growth rate (CAGR) of 7.5% between 2013 and 2019. Nights spent in the region also increased, with a CAGR of 7.0%.

Like the vast majority of destinations globally, the Grampians region saw a decline in visitation as a result of border closures and travel lockdowns instated by Government in response to the COVID-19 pandemic. Despite this, visitation to the Grampians was not as dramatically impacted as many other regions because of its regional location and assets and strong profile in the domestic market.

The figure below demonstrates visitation growth projections, along with visitor night forecasts for the region. A conservative growth approach has been adopted to reflect a desire to move toward a higher yield and value-driven economy, rather than merely focusing on visitor volume.

The growth projections still reflect a strong and sustainable CAGR of 4.5%. This can significantly grow if there is a greater supply of new and enhanced accommodation and tourism products/experiences throughout the region to help meet market demand.



Regional visitors & visitor nights forecasts

* Based on medium growth forecasts for the region.

NEW ACCOMMODATION NEEDED BY 2025

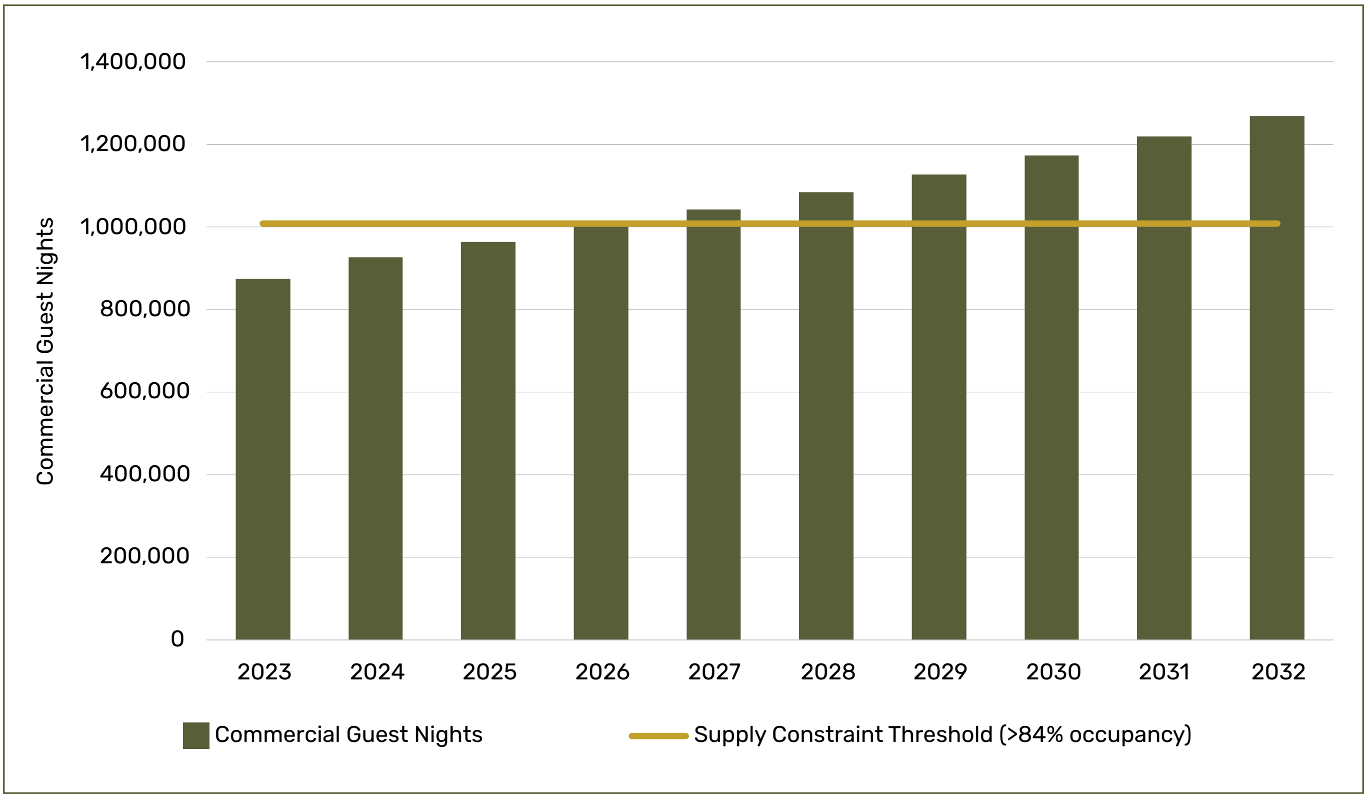
While the Grampians has a five-star natural environment, the quality of accommodation stock is more variable and therefore offers several opportunities for new and enhanced facilities.

To support the ongoing projected visitor growth for the region, there is a need to introduce new accommodation stock. In order to cater to the high-value traveller — who are likely to spend more, stay longer, disperse more regionally and who also have distinct key drivers for destination choice such as nature, wildlife, food and wine — higher-quality and more diverse forms of accommodation are required.

The figure below shows the current commercial accommodation supply in the Grampians, including quality commercial accommodation supply*, measured against demand forecasts for medium scenario growth.

This illustrates that an estimated regional occupancy threshold of 85% is reached by 2026. This level of occupancy reflects when new development and capacity are needed and is a general metric applied across many regions.

Capacity vs demand forecast for the Grampians region's accommodation



*It is estimated that approximately 75% of the commercial accommodation room stock available in the Grampians is of a sufficient quality to be truly marketed as being a 3-star quality standard or higher.

VALUE OF THE VISITOR ECONOMY

AT A GLANCE

With high-quality natural assets, a rich cultural history and a foundation of strong business sectors which continue to evolve, the Grampians is a vibrant and exciting destination in which to invest.

$297M
spend in the region

5,900 JOBS
supported by tourism

1.7M
visitors to the region

2.5 NIGHTS
average length of stay

2.0M
nights in the region

$1.09B
in tourism output

* Based on YE Dec 19 pre-COVID visitation data.

VICTORIAN GOVERNMENT — BACKING TOURISM

In 2019, the Victorian Government commissioned the Regional Tourism Review to identify opportunities to grow regional tourism.

The State Government recognised the critical need to support the tourism sector as a significantly impacted industry, following the bushfires and then the global pandemic, and the subsequent Visitor Economy Recovery and Reform Plan (VERRP) confirms that commitment.

Informed by the findings of the Regional Tourism Review, the VERRP aims to strengthen the state's enviable tourism offering by developing new experiences, products and infrastructure and attracting more international, interstate and intrastate visitors by making the most of marketing expenditure.

With investment of over $633m across four years, the Victorian State Government is dedicated to developing and improving the visitor experience through destination planning and industry development and, as the tourism market grows more competitive, encourage public and private investment to not only provide high-quality tourism products but to grow the visitor base and inspire visitors to stay longer and spend more.

The Visitor Economy Plan highlights the importance of nature-based tourism as a key pillar for tourism development. And the Government's significant investment in the Grampians Peaks Trail highlights this as a hero experience for our state. With their commitment to strengthening the visitor experience, the Grampians region is well positioned to continue leveraging the State's focus on arts and culture, epicurean, natural attractions, and First Nations' led tourism experiences.

With the State Government's backing, Victoria and the Grampians is a great place to invest.

STATE & FEDERAL GOVERNMENT SUPPORT

Some of the region's most exciting projects have just recently been delivered or are currently in progress and are rapidly transforming the region.

Ongoing investment in infrastructure is a key commitment of the Victorian State Government and each Local Government partner, providing significant opportunities for private sector leverage and involvement in its delivery.

Grampians Peaks Trail

Over $33m in State and Federal Funding.

MacKenzie Falls Revitalisation

Over $7.76m in State Funding.

Grampians Peaks Trail Trailheads

$5m in State Funding.

Brambuk Revitalisation

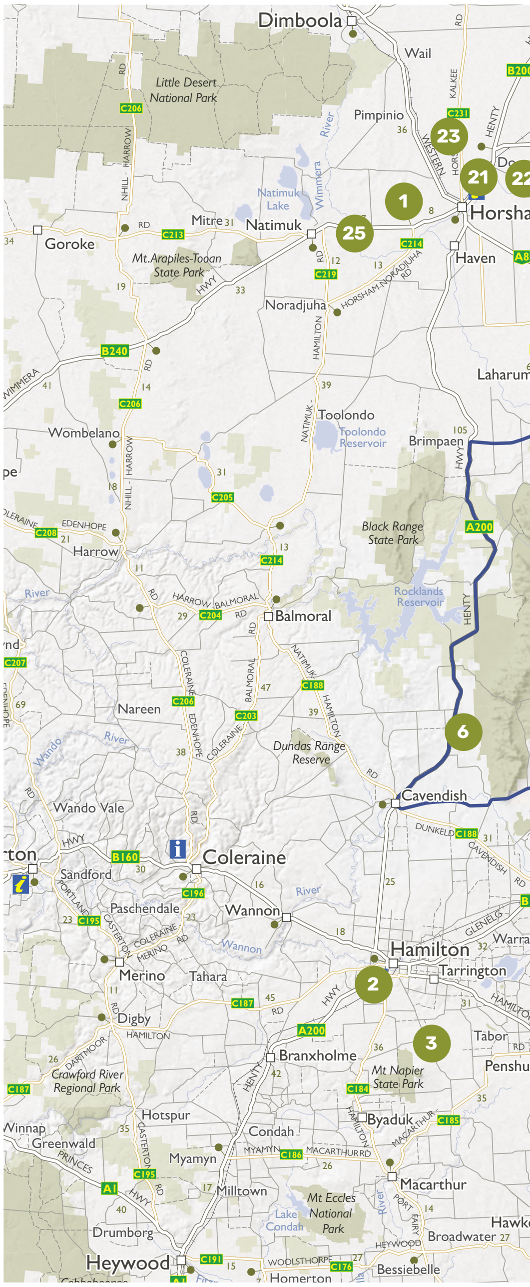
$6m in State Funding.

Ararat Hills Mountain Bike Trail Project

$2.7m in State Funding.

Dunkeld Visitor Hub & Penshurst Volcanoes Discovery Centre

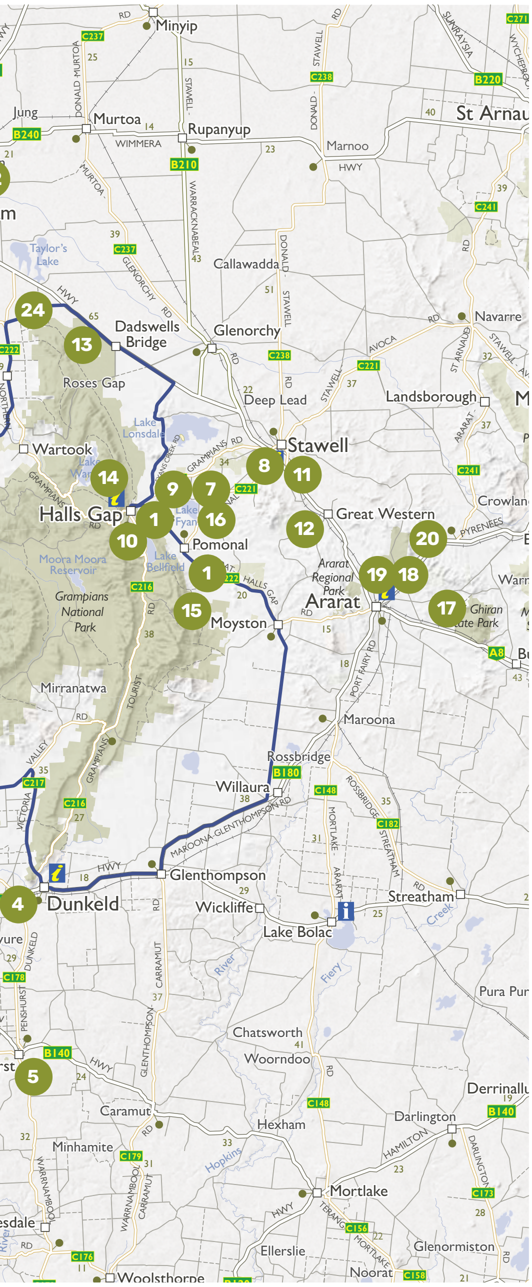
$1.4m with $500,000 in State Funding.



INVESTMENT PROJECTS: $250M

The current and future tourism investment projects for the Grampians region are valued at over $250m and will further enhance the visitor experience.

These new and innovative tourism projects will drive visitation, increase yield and length of stay, and will continue to position the Grampians region as a leading nature-based tourism destination.



1 **Australian Tourism Group & Destination Collective**
Boutique accommodation development – $50m

2 **Hamilton CBD Redevelopment**
Redevelopment – $25m

3 **Greater Hamilton Volcanic Trail**
Masterplan – $1m

4 **Dunkeld Visitor Hub**
Experience Hub development – $1.4m

5 **Penshurst Volcanoes Discovery Centre**
Visitor experience redevelopment – $500,000

6 **Bull's Roar Brewing Co.**
Food and beverage development – $1.5m

7 **WAMA – Where Art Meets Nature**
Eco-tourism destination project – $9m

8 **Grampians Stawell Central**
36 luxury suites development – $9m

9 **GROW at Grampians Getaway**
Health and wellbeing development – $3m

10 **Halls Gap Luxury Accommodation**
Development project underway – $1.25m

11 **Dark Matter Discovery Centre**
Visitor experience development – $10m

12 **Great Western Accommodation**
Development project – $15m

13 **Peaks Eco Retreat**
Eco accommodation development – $1.5m

14 **SHAK accommodation**
High end accommodation development – $1.15m

15 **Pomonal Bath House**
Health and wellbeing development – $3.5m

16 **Pomonal Estate Resort**
Accommodation development – $3.5m

17 **Green Hill Lake Estate**
Residential development – $4.5m

18 **Chalambar Estate**
Residential development: stage 1 – $1.5m

19 **Omeroo Estate**
Residential development – $3.5m

20 **Evans Park**
Residential development - $7m

21 **Horsham City to River Development**
Major development – $30.1m
Includes: **Wimmera Riverfront Activation** – $3.6m
Horsham Nature Water Play Park – $2.45m

22 **Quest Apartment Hotel Horsham**
Accommodation development – $14m

23 **Aerodrome Master Plan Works**
Master planning – $2.4m

24 **Mount Zero Resort**
Luxury nature-based accommodation development – $26.5m

25 **Wimmera River Discovery Trail** (Horsham to Natimuk)
Visitor experience development – $2.95m

KEY HERO VISITATION PILLARS

GRAMPIANS (GARIWERD) NATIONAL PARK

Renowned for rugged mountain ranges, rich cultural heritage and breathtaking views, the Grampians (Gariwerd) National Park is one of Victoria's most popular holiday destinations for outdoor adventures and scenic drives. The National Park is highly regarded for its ecological diversity and for south-eastern Australia's highest concentration of Aboriginal rock art. A network of walking tracks and lookouts throughout the park take visitors to spectacular waterfalls, rock formations and trailheads, providing hikers with increased flexibility, information and facilities to access the trail. Improvements will likely include new toilets at some locations, improved car parking, larger water tanks, and opportunities to learn more about the Aboriginal cultural and environmental values of Gariwerd.

INDIGENOUS CULTURE AND BRAMBUK
— THE NATIONAL PARK AND CULTURAL CENTRE

The Grampians is pivotal to many ancient stories of Aboriginal communities in south-western Victoria. The region has the largest number of rock art sites in southern Australia and is home to over 85% of Victoria's rock art sites, some dating back over 20,000 years. Visitors are invited to experience these cultural sites first-hand and to learn about the region's unique Aboriginal culture and history at Brambuk — The National Park and Cultural Centre in Halls Gap.

Over the last 30 years, Brambuk has supported Gariwerd Traditional Owners as a gathering place for community business, training, cultural heritage services, activities and celebrations. Parks Victoria is currently collaborating with Traditional Owners on a Reimagining and Revitalisation project and $6m in State Government funding has been invested to revitalise Brambuk so that it can continue to evolve as a flagship cultural experience in Victoria.

GRAMPIANS PEAKS TRAIL

The Grampians Peaks Trail connects some of the Grampians' most spectacular peaks, from the massive sandstone outcrops around Mount Stapylton in the north to Mud-Dadjug (Mount Abrupt) in the south. It can be done as the full 160km 13 day/12 night hike, or in shorter sections with more than 20 different trail options on offer.

Regardless of the itinerary selected, the trail provides walkers an experience rich in the Aboriginal culture of the Jardwadjali and Djab Wurrung peoples, who have lived in these ranges they call Gariwerd for thousands of years.

Interpretation signage along the trail helps hikers learn more about the area's Aboriginal cultural heritage and provides information about the national park's incredible environmental values.

There are 11 bookable hike-in campgrounds with camper numbers capped at between 20 to 35 depending on the location and to ensure a special experience. Two of the hike-in campgrounds, Gar and Werdug, feature three small Hiker Hut accommodation options, to support walkers looking for more comfort. These huts are only bookable by Licensed Tour Operators.

GAME CHANGER FOR THE GRAMPIANS REGION

- The Grampians (Gariwerd) National Park is a major Australian attraction and the third most visited park in the state with over 1.3 million visitors per year.
- By 2025, 35,000 walkers are projected to visit Grampians (Gariwerd) National Park, generating $6.39m of economic benefit and tourism development opportunities for the region each year.
- Construction and operation of the trail is estimated to create 175 jobs.
- With the trail projected to bring more than 23,000 additional walkers to the area each year, staying around 53,200 nights by 2025, extra jobs will be needed to service visitors' needs in the hospitality, tourism and accommodation industries.

GRAMPIANS PEAKS TRAIL $33M INVESTMENT

Hike to new heights

A world-class 160km hiking experience with spectacular views

The Grampians Peaks Trail is a challenging hiking experience along the rooftop of the heritage-listed Grampians (Gariwerd) National Park.

The $33 million investment attracts opportunities to the region well beyond the walk itself and is an important economic and tourism development for the local community, the wider region, and for Victoria as a key nature-based tourism destination.

Bookings performance

Since its opening, more than 10,000 nights have been booked in campgrounds along the trail. And by attracting new visitors to the park and increasing the length of their stay, the Grampians Peaks Trail is providing a significant boost to the region's visitor economy.

MACKENZIE FALLS

The iconic and spectacular MacKenzie Falls is a must do for all visiting the Grampians (Gariwerd) National Park. As one of the largest waterfalls in Victoria surrounded by beautiful green, lush and unspoiled scenery, it flows year-round and is among the most visited nature-based tourism sites across the State with over 600,000 visitors annually.

The Victorian Government is investing $7.76m to revitalise the MacKenzie Falls visitor precinct and surrounding area, including the Zumsteins (Bun-nah) walking trail and day visitor area. This work will help cater for visitor numbers, manage visitor safety, and better protect the significant cultural, natural and recreational values of the area.

GREAT LAKES OF THE GRAMPIANS

The Great Lakes and waterways of the Grampians region provides considerable environmental and recreational benefits and helps attract visitors and support increased length of stay.

As the largest gravity fed water distribution system in the world, our lakes and waterways include Lake Bellfield, Lake Fyans, Lake Wartook, Lake Bolac, Moora Moora Reservoir, Rocklands Reservoir, Green Hill Lake, Lake Toolondo and Lake Hamilton.

Whether it's fishing, kayaking, canoeing, paddle boarding, sailing, water skiing or swimming, visitors can enjoy a variety of water activities.

With the growing demand for lakefront views, the Great Lakes of the Grampians provides significant commercial opportunities for private investment in accommodation on crown land adjacent to the lakes, and on water including electric house boats and recreational activities.

GRAMPIANS AND HENTY WINE REGIONS

The Grampians wine region is home to some of the world's oldest vines and is located against the backdrop of the magnificent Grampians and Pyrenees mountain ranges. Known for dense, purple and peppery shiraz and sparkling wines, the Grampians has been producing quality wine for more than a century and a half with a mix of large and boutique wineries surrounding the towns of Great Western, Ararat, Moyston, Halls Gap, Dunkeld, Tarrington and Hamilton.

While the Henty wine region has one of the coolest climates of Australia's mainland wine growing regions and covers Victoria's southwest. The region is known for its aromatic white wines, luscious sweet dessert wines and intense, finely structured reds.

Two recent accolades, from arguably the biggest awards in Australian wine, were awarded to Best's Wines in Great Western for the James Halliday 'Wine of the Year' and to Fallen Giants Vineyard in Halls Gap, taking home the Jimmy Watson Memorial Trophy.

MAJOR EVENTS

Events hosted in the Grampians allow visitors to experience our breathtaking natural assets, diverse communities and local hospitality. And our region is home to some iconic events including Grampians Grape Escape, the famous Stawell Gift at Easter and the Dunkeld Races.

As one of Australia's longest-running food and wine festivals, the Grampians Grape Escape is held in Halls Gap the first weekend in May and has been a celebration of Western Victoria's producers and makers for the best part of 30 years. The 2022 event was attended by almost 9,000 people and included exhibitor masterclasses and cooking demonstrations, live music and plenty of fun activities for the kids.

Over 60% of the festival goers came to the region specifically for the event, 92% said they'd likely attend the festival again and overall, 65% said they'd revisit the Grampians before the next festival. Such key events in the Grampians region are critical to increasing visitation, length of stay and showcasing our destination.

GREAT SOUTHERN TOURING ROUTE & INTERNATIONAL VISITATION

Grampians Tourism is a member association of the Great Southern Touring Route Inc (GSTR), regarded as one of the world's best road trips encompassing Melbourne, Geelong and the Bellarine, Great Ocean Road and the Grampians, and the Ballarat and Daylesford regions. Supported by Visit Victoria and Austrade, GSTR was established to co-operatively market its member regions and participating products to the international travel trade allowing for greater reach and partnership opportunities.

Based on the YE Dec 19, there were 57,200 international overnight visitors to the Grampians, up by 11.5% YE Dec 18. Visitors stayed for 275,900 nights in the region and represented over $20 million in visitor expenditure.

International tourism has longer lead times and helps balance out domestic holiday patterns. It also provides a higher yield and spend with international travellers on average spending three times more than domestic travellers. Growth in international visitation is a key priority for GT. At present the UK, Europe and North America make up over 50% of all visitors. And while Asia is not a large market for the region, it's a long-term development opportunity with growth potential in both leisure and VFR.

MARKETING THE GRAMPIANS

Partnerships are essential to the success of our region. Together we are showing travellers why our spectacular Grampians region is a 'must visit' destination.

By highlighting our region's strengths and diversity and working in partnership with Visit Victoria, industry and stakeholders, we are building destination awareness, inspiration, consideration and intent in the minds of our target audiences.

Through targeted communications, campaigns and other marketing initiatives, we drive conversion through to visitation and dispersal by connecting visitors with the places, products and experiences they seek.

Our 'The Grampians Way' destination campaign continues to evolve, with regularly refreshed creative and messaging such as the **Piece together your ultimate road trip** "jigsaw" puzzle designs which not only encourages dispersal throughout the region but also ensures that we own the Road Trip space in the minds of Victorians and our neighbours interstate.

We utilise PR, digital advertising, social media, media partnerships and collaborate with Visit Victoria, the Great Southern Touring Route and Tourism Australia to ensure that our region is top of mind.

In 2021/22 our audience grew over 10% and our overall digital marketing performance continued its upward momentum, with 18 million impressions, reaching more people, more times over this past financial year than ever before.

Highly engaged audience and industry-leading consumer reach

Combined audience
89,200
Facebook 45,100 | Instagram 44,100

Combined annual reach
10,789,453
Facebook 5,475,632 | Instagram 5,313,821

Total impressions
18M

Advertising reach
3.8M

Operator conversions
71,700

HIGH PRIORITY INVESTMENT OPPORTUNITIES

This list of high priority investment opportunities has been assessed against a number of weighted criteria and reflect the priority projects to facilitate the sustainable growth of the Grampians' visitor economy.

This list summarises the priority private investment opportunities that achieved a top 15 score based on the ranking methodology applied. Several other opportunities have also been identified and are contained in the supporting Grampians Strategic Tourism Investment Plan.

The projects are not listed in any priority order.

- **HIGH-END ECO-LODGE** (Ararat Region)
- **RIVER-EDGE RESTAURANT & FUNCTION CENTRE** (Horsham Region)
- **4-STAR HOTEL/RESORT** (Northern Grampians Region)
- **OFF-PARK LODGES LINKED TO THE GPT** (Southern Grampians Region)
- **BOUTIQUE BEVERAGE DISTILLERY** (Ararat and Southern Grampians Regions)
- **DESTINATION HOLIDAY PARK** (Horsham and Southern Grampians Regions)
- **INDOOR ACTIVITY CENTRE** (Northern Grampians Region)
- **GEOTHERMAL SPA EXPERIENCE** (Southern Grampians and Horsham Regions)
- **ECO-PODS** (Ararat Region and Northern Grampians Region)
- **WATERWAY ELECTRIC HOUSEBOATS** (Northern and Southern Grampians Regions)
- **LUXURY ACCOMMODATION** (Southern Grampians Region)
- **MOUNT ZERO RESORT** (Horsham Region)
- **GRAMPIANS WINE & PRODUCE DISCOVERY CENTRE** (Ararat Region)
- **TOURISM AVIATION HUB** (Horsham and Southern Grampians Regions)
- **3.5-STAR BRANDED BUSINESS & LEISURE HOTEL** (Ararat Region)

HIGH-END ECO-LODGE

ARARAT REGION

$35m (CAPEX estimate)

Ararat has limited diverse and higher quality accommodation options. This results in economic leakage and a shorter visitor dwell time as visitors opt to stay outside of the area. To lift the quality of accommodation on offer in Ararat and to complement the high-quality environment, the opportunity exists to develop a higher-end eco-lodge.

Well-established and successful upmarket lodges often have a strong all year-round clientele with different experiences offered in summer and shoulder months compared to winter periods. Considering the excellent fishing options, hunting, cycling, trekking and bird spotting available throughout the broader area, potential should exist for year-round demand in the region.

Typically, these types of facilities may be characterised by:

- Absolute privacy reflecting the demands of the clientele and the need for exclusivity
- High-quality landscaping and, where appropriate, spas, hot tubs and pools
- Often offering 12 to 25 villas or luxury rooms with onsite staff accommodation due to their relative isolation and the need to engage highly skilled staff who expect to have accommodation on-site
- Offer a wellness centre that includes a high-quality day spa and yoga studio
- Exclusive dining options but with the potential for a smaller percentage of casual pre-booked diners
- Would need to be a greenfield development with stunning architectural features and on sites greater than 8 ha.

It is understood that there are potential sites linked to quality vineyards though no specific site has yet been identified. Finding one near/amongst the LGA's wineries would be ideal.

High-quality Eco-lodge precedents

Spicers Peak Lodge, Maryvale, QLD; The Cradle Boutique Hotel, South Africa; Skyscape, Twizel, New Zealand

RIVER-EDGE RESTAURANT & FUNCTION CENTRE

HORSHAM REGION

$3+m (CAPEX estimate)

Horsham Rural City Council has developed an exciting City to River Masterplan which plans for the long-term future growth of the Wimmera River Precinct and the Central Activities District. The Masterplan aims to transform and revitalise the area to make it a more attractive place to live, work, visit, play and invest in.

As part of the Masterplan, the potential for a riverfront restaurant is identified, along with an event/function facility. The facility could offer a valuable asset to support a large regional catchment area noting that some existing facilities in the region are smaller and older now. The venue could also support a wedding and family function market along with the broader business and meetings market.

The CAPEX for this project is estimated at $3+m, however, this is likely to vary depending on the size/scale of the facility developed. This project is strongly supported by Council as it is at a key location to help act as a catalyst for a number of other recreational and commercial development to occur as part of the Masterplan.

Horsham River to City Masterplan

4-STAR HOTEL/RESORT

NORTHERN GRAMPIANS REGION

$45m (CAPEX estimate)

The majority of accommodation categories for the visitor market in the region is currently limited to mostly more traditional-style 3-star motels, pub accommodation and small-scale B&Bs. Northern Grampians is missing a newer, higher-quality property to attract a higher-yielding market and to complement the stunning natural environment and GPT amenities.

A new 4-star facility would fill a product gap in the marketplace and offer an accommodation option to meet the needs of the growing family market along with the higher-end RV and caravan niche market who regularly aim for a few nights out of their vehicles if the option of nice accommodation is available to them. There is also a regular business traveller market travelling through the region to offer government services and support, health, energy, teaching, and other forms of services and with a budget which allows them to stay at better quality facilities.

Though feasibility analysis is required, based on regional market demand and product gap assessments, a facility offering 40 to 60 units/rooms is potentially needed to meet forecast demand. Therefore, designing a facility that can include a potential stage two development extension when demand is shown for this, could be a prudent option.

There are several possible sites that could be considered, and Council is keen to work with potential developers and investors to ensure an optimum location is found.

Halls Gap

Great Western

OFF-PARK LODGES LINKED TO THE GPT

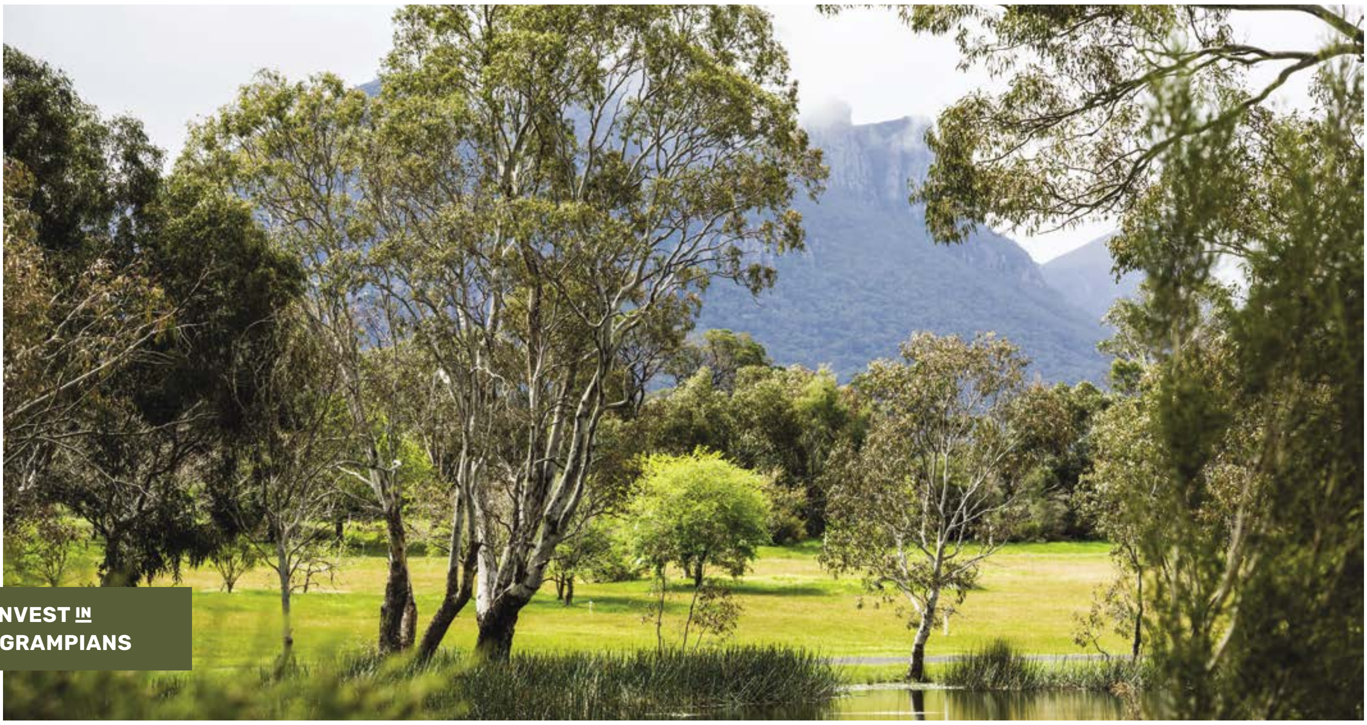
SOUTHERN GRAMPIANS REGION

$15m (CAPEX estimate)

To bookend the GPT and in conjunction with the proposed Mount Zero Resort at the Northern gateway, the opportunity may exist for an off-park lodge at Dunkeld or surrounds to offer a Southern accommodation anchor for the trail.

The lodge could comprise a 3-star eco-style property with 20 to 30 rooms. It could offer GPT walkers a place to stay post-walk and also allow shorter walks to be undertaken on the trail with walkers staying at the eco-style property, as not everyone will want to walk the entire 13 day trail, but may wish to consider shorter options including half and full day walks in the region.

Dunkeld & surrounds landscapes



BOUTIQUE BEVERAGE FACILITY

ARARAT AND SOUTHERN GRAMPIANS REGIONS

$6m (CAPEX estimate)

The Grampians has a solid profile as a wine production and agricultural region. The potential exists to build on this profile and introduce, by perhaps using a re-purposed industrial building, a distillery: gin, vodka or tequila, or a cider house or craft beer brewery.

These types of facilities offer an exciting mechanism to encourage more visitors to stop and stay in the area, especially where the facility can also offer tasting sessions, guided tours, meals and a venue for events and functions which support local community needs as well.

Using natural ingredients to create unique tastes, from wildflowers, berries, barks etc, the facility could generate both a very strong local market and a seasonal visitor market.

Ideally, a suitable site could be in and around the main street of Ararat or Hamilton, where visitors can undertake a tasting and/or a meal, then walk back to their accommodation. Space-wise, gin, vodka or tequila distilleries take up little industrial space, unlike whisky distilleries which require a larger footprint.

The capital cost to set up a small distillery can vary markedly depending on the facility being retrofitted and the quality of fit out being applied, but in broad terms, could cost circa $6m-plus as the cost could be far greater depending on the type of facility and location.

Distillery precedents

Kalki Moon Distilling & Brewing, QLD; Borough Market Gin Distillery, UK; Wildbrumby Schnapps Distillery, NSW; Fossey's Distillery, VIC.

DESTINATION HOLIDAY PARK

HORSHAM AND SOUTHERN GRAMPIANS REGIONS

$45m (CAPEX estimate)

Current market demand for powered caravan, RV and camping sites has outstripped supply throughout many locations Australia-wide. While there are some caravan and camping facilities in Horsham and the broader region, these are limited and are often of a fairly basic standard. What is missing is a true destination holiday park that could offer circa:

- 15 to 25 eco cabins of a good standard
- 50 to 70 powered camping and caravan/RV sites
- 60-100 room key hotel

Supporting family-friendly recreation facilities such as a high rope course, mini pump track, a water splash pad/swimming facility, mini-golf, etc.

Noting that people who book branded destination holiday parks will often expect these and other value adds as part of the brand's appeal.

A new true destination holiday park would offer the potential for far more visitors to stay in the Horsham/Southern Grampians regions than currently, and for a longer length of time as they could base themselves and undertake day excursions from the site.

It is especially important to deliver a quality product to appeal more widely to the RV/caravan market as well as the growing family market, which recent trends indicate are coming to explore regional areas of Victoria and which may include a trip into South Australia as well.

For Horsham, a possible potential site has been identified within the grounds of the Horsham Golf Club. The Golf Club is keen to investigate options for leasing and/or selling the site to a quality destination holiday park developer/operator.

Destination holiday park precedents

North Star Holiday Resort, NSW; Port Fairy Holiday Park, VIC; BIG4 Traralgon Park Lane Holiday Park, Latrobe Valley, VIC.

INDOOR ACTIVITY CENTRE

NORTHERN GRAMPIANS REGION

$8m (CAPEX estimate)

Aside from free outdoor activities, the region currently offers limited family-friendly activities, and virtually no indoor all-weather experiences, aside from galleries and museums which are very passive in their offering.

While visitors love Halls Gap and its accessibility to Grampians (Gariwerd) National Park, there are limited things to do when the weather conditions make undertaking activities within the National Park problematic.

To leverage Halls Gap's profile as a nature-based recreational hub, the opportunity exists to investigate the development of an indoor activity centre which would not only provide an all-weather attraction, but also a year-round activity for visitors and locals to participate in during all seasons. This facility could offer rock climbing, bouldering, high ropes and aerial courses, trampolining etc.

It may also be used as an official training base for institutes of sport with the potential to eventually morph into a high-performance sports centre. It could also provide an important training space for various other sportspeople when not in general use so may have several complementary user groups to appeal to.

The ability to offer rock climbing could also potentially address some of the challenges associated with rock climbing in Grampians (Gariwerd) National Park by offering visitors and locals an alternative and safer option.

As this facility could offer a variety of paid attraction uses and government sports centre facilities, it should be developed as a public-private partnership project and with the potential to develop it in stages

Indoor activity centre precedents

Climbfit, Kirawee, Sydney; Swiss Mega Park, Switzerland; Chu Pea Park, Japan; Supaworld Hobart, Tasmania; Ninja 101, Sydney

GEOTHERMAL SPA EXPERIENCE

DUNKELD AND/OR HORSHAM REGIONS

$7.5m (CAPEX estimate)

Spa tourism is in its relative infancy in Australia, but is a growing market and a higher-yielding sector. This growth is underpinned by the increasing affluence of western society and the desire for self-care. Internationally, there are many examples of successful spa resorts and towns, based on both geothermal and natural mineral water supply, and the market continues to gain momentum.

Victoria offers a climate that makes it ideal to leverage this growth with several higher-quality spa destinations including Daylesford, the Macedon Ranges and the Mornington Peninsula, as well as various experiences in Melbourne, on the Great Ocean Road, in Gippsland and the Murray region. The Grampians not only offers a climate that is suited to geothermal spa experiences but also has a product base and brand positioning that strongly complements this type of product with its strong nature tourism themes and landscapes.

The market attracted to spa tourism is generally a higher-yielding market with a propensity to spend on higher-quality accommodation options and related quality food and beverage services.

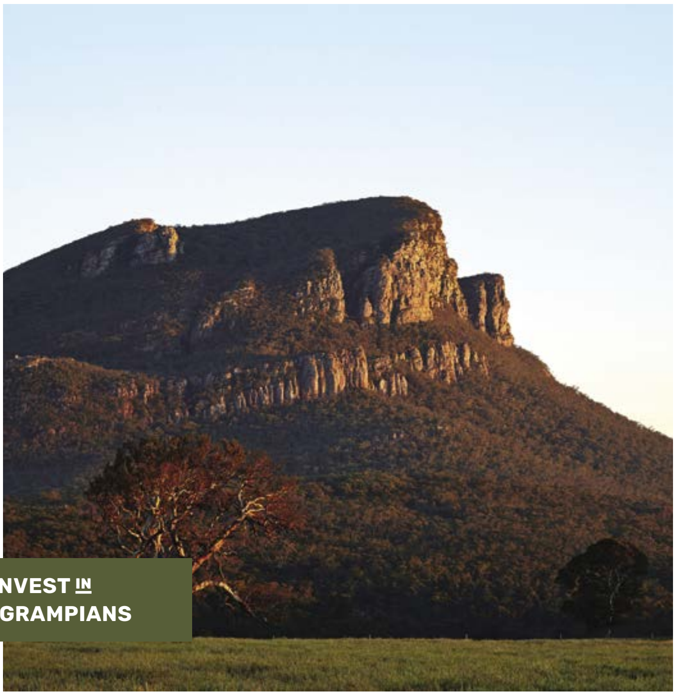
The Southern Grampians or Horsham regions appear to be best suited out of the four LGAs for the development of a geothermal spa experience given its ground temperatures and based on geothermal mapping in the region. Both have a geothermal capacity which could offer hot pools and spa facilities.

Dunkeld would be an ideal location given the Royal Mail Hotel's fine dining experience and the strong synergies this has with a high-quality spa experience but other locations should be tested.

The geothermal spa experience could include a day spa, wellness centre and/or hot pools facility to support the venue being positioned as a holistic health and wellness location. It could also potentially be marketed as a venue for medical tourism to support those recuperating from medical procedures and often staying in nearby accommodation.

Spa/geothermal experience precedents

Hamner Springs, NZ; Tekapo Springs, NZ; Peninsula Hot Springs, VIC; Wickens at the Royal Mail Hotel, VIC.



ECO-PODS

ARARAT AND NORTHERN GRAMPIANS REGIONS

$6.5m (CAPEX estimate)

The potential exists to develop a quality upmarket eco-pod facility with a suggestion of up to 12 eco-pods rather than standard glamping tents. The region has some magnificent landscapes which provide unique environments for positioning a glamping operation, but climatic conditions do require a pod-style of accommodation to offer comfortable and warm accommodation all year round.

Council is keen to work with suitably skilled operators and developers to find locations.

And to ensure highly sustainable environmental infrastructure can be provided to allow eco-pods to be introduced in a suitable quality location.

Because of seasonal weather patterns, it would likely require a robust and all-weather style of eco-pod rather than a more lightweight sub-tropical style of tent amenity.

Based on comparative examples, the likely capital cost is thought to be circa $6.5m including eco-pods, supporting back of house facilities and camp-style dining etc.

Eco-pod precedents

Ridgeback Lodge, Canada; Treebones Resort, USA; Bubble Tents, Mudgee, NSW; CABN, Adelaide SA.

WATERWAY ELECTRIC HOUSEBOATS

NORTHERN AND SOUTHERN GRAMPIANS REGIONS

$5m (CAPEX estimate)

The Grampians region offers several highly attractive waterways. Many of these are underutilised as tourism assets and have the potential to play a far greater role in encouraging visitation to the region, providing that access to the water and required licenses from regulatory bodies are possible.

The introduction of electric houseboats onto some of the region's waterways will provide a new joint attraction experience and a unique accommodation category while complementing the high-quality natural environment. Electric houseboats offer an alternative to fuel-powered boats and are far quieter, more efficient and far more environmentally friendly.

Lake Bellfield, Lake Fyans and Rocklands Reservoir would appear to be suited to this type of boating activity but further research would need to be undertaken with relevant government agencies to scope this out.

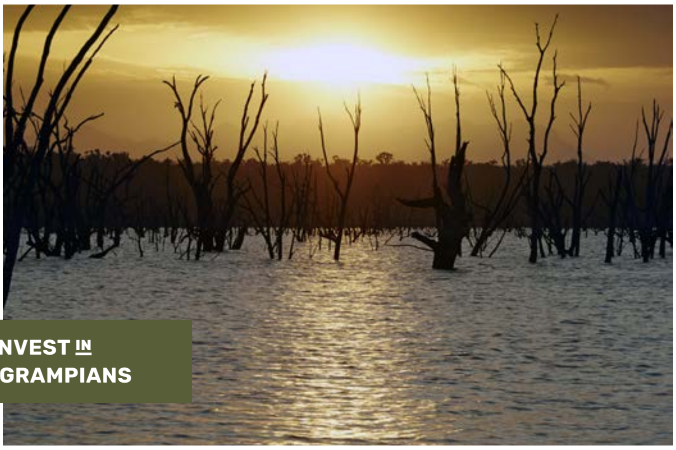
The $5m capital cost that has been estimated for this project may enable the purchase and fit out of 4 to 6 electric houseboats catering for 4 to 6 people each.

Electric & solar houseboat precedents

Potential houseboat location: Lake Bellfield

Potential houseboat location: Rocklands Reservoir

Potential houseboat location: Lake Fyans



LUXURY ACCOMMODATION

SOUTHERN GRAMPIANS REGION

$7m (CAPEX estimate)

The opportunity may exist to develop a smaller-scale luxury accommodation property at Dunkeld or surrounds to support a longer length of visitor stay in the region and to provide more accommodation offerings for visitors to Dunkeld and the wider region.

Visitor length of stay is expected to increase, as those walking the GPT end at the southern trailhead and are being encouraged to stay in the region for longer and take part in other experiences.

A luxury unit/chalet style of development may be appropriate which can also be staged and added to over time if market demand is shown to support this. There is currently very limited quality accommodation in the broader region other than units provided at the Royal Mail Hotel and in associated B&B accommodation.

The CAPEX that is estimated for this project includes the development of 6-8 luxury units/ chalets as an initial first stage of development only.

Dunkeld landscape

MOUNT ZERO RESORT

HORSHAM REGION

$30m (CAPEX estimate)*

A luxury nature-based resort is proposed in Laharum, on the edge of the Grampians (Gariwerd) National Park. Once completed, the resort could be the premier accommodation in the Grampians.

The resort's excellent location offers magnificent views of Mount Zero and the National Park. The resort will provide a hub to explore the park and is close to Mount Zero Picnic Ground and the northern trailhead of the Grampians Peaks Trail. It is the perfect location for visitors to base themselves to explore the Grampians or unwind in one of Victoria's truly unique landscapes.

The proposed development concept, to be delivered in stages, incorporates the development of eventually up to 110 short stay accommodation units and integrates a range of accommodation options including self-contained eco-style lodges, bowers, glamping and camping.

Stage 1 of the development will include the construction of 40 lodge-style villas, a function centre with a restaurant and cote (the Pavilion), a spa and wellness facility as well as associated car parking and landscaping.

Stage 2 is estimated at $10m and includes glamping and camping sites and facilities.

Award-winning architects and landscape designers have prepared a design concept for an integrated resort development. From the palette to its architectural form, the resort is inspired by its surroundings and designed to blend into the bushland environment.

Forecast financial outcomes as advised, include the following:

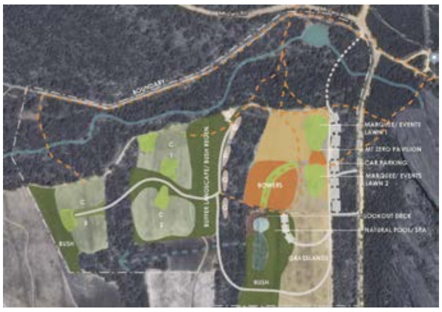
- Estimated average room rate= $470 incl. GST
- Project internal rate of return (IRR)
  - Unlevered** = 22.5%
  - Levered***= 29.6%

* Project has development approval including State Government Funding Support. Currently seeking investors.

** Unlevered IRR or unleveraged IRR is the internal rate of return of a string of cash flows without financing.

*** Levered IRR or leveraged IRR is the internal rate of return of a string of cash flows with financing included.

Concept Plan



Strategic location on the GPT

Resort Lobby

Lagoon Spa and Wetlands

Lodging

Bowers

Aerial View

GRAMPIANS WINE & PRODUCE DISCOVERY CENTRE

ARARAT REGION

$18m (CAPEX estimate)

The Grampians wine region has over 150 years of history, with some of the world's oldest vines and is one of the longest continually producing wine regions in Victoria. While our wine and food offering is growing, the Grampians struggles at times to compete with other larger wine regions because of a lack of visible presence.

Many vineyards and winemakers nationwide indicate they are keen to explore tourism uses on-site but are challenged by issues including insurance, finding sufficient staff and biosecurity issues. This is often the case for more boutique producers.

To help overcome this, the potential exists to develop a regional wine and produce showcase centre or emporium. This could feature the region's vineyards, offer a shopfront for the vineyards and, potentially on a rotating basis, offer tastings. To assist with project commercial viability, a pop-up and seasonal facility is suggested until it can be a permanent facility with secure revenue streams.

Because of the strength of some of the food producers/growers in the region (olives etc), the potential also exists to investigate including them in the centre so the facility becomes a true showcase of the best of the Grampians' produce.

The CAPEX for this project is estimated at $18 million, although a pop-up version would come at a significantly lower capital cost. As the facility could offer a strong retail facility and dining option as well as displays, it is suggested as either a private sector initiative or a potential public–private partnership.

Wine and produce emporium precedents

Paesanella Food Emporium, Marrickville, NSW; National Wine Centre, Adelaide, SA; Pialligo Food Emporium, Canberra, ACT

INVEST IN
THE GRAMPIANS

TOURISM AVIATION ACTIVITY HUB

HORSHAM AND SOUTHERN GRAMPIANS REGIONS

$1.4m (CAPEX estimate)

The Horsham Rural City Council is keen to further activate the Horsham Aerodrome to support several longer-term uses including air access for visitor markets to the region and various aviation-based business enterprises. To achieve this, it would include investigating the introduction of tourism-based recreational aviation experiences. This includes, but is not limited to, the following:

- Eventual scheduled regular passenger services and scenic flights for the wider region
- Gliding and training
- Paragliding
- Parachuting
- Light aircraft training school
- Microlights
- Potentially a hub for visitation by light aircraft visitors (flying in) needing parking for aircraft, refuelling and basic maintenance.

The airfield already supports some of these uses such as the rural fire service, medical flights, and a limited business market. Being slightly further away from more alpine terrain is also likely to assist with encouraging various tourism aviation experiences as noted above.

The aerodrome already has several private businesses operating from it with the potential to consider relocating some existing businesses and establishing more industrial park-style facilities on this site, rather than within the Horsham CBD.

The Southern Grampians Shire Council is also interested in offering an expanded aviation hub in Hamilton to support a range of leisure, business and community aviation linked requirements.

Horsham Aerodrome

3-4-STAR BRANDED BUSINESS & LEISURE HOTEL

ARARAT REGION

$45m (CAPEX estimate)

While noted as a hub for business, Ararat currently struggles to attract strong overnight visitation because of a lack of accommodation. Council is therefore keen to encourage stronger accommodation options of a higher standard to support greater business travel to the region.

The opportunity exists to investigate the development of a 3-4 star, 60-80 room branded accommodation property to cater to this business market, along with a leisure market looking for higher quality accommodation.

Council has identified a potential vacant site within the CBD (247 Barkly Street) that could offer an ideal location for development. This is close to major city assets and F&B providers.

A branded property is suggested for several reasons, including the following:

- They bring with them existing databases of customers who often only stay in their brand of property so achieve higher occupancy levels
- They have strong marketing budgets that are not only used to market the property but also their respective locations
- They offer a stronger well maintained quality standard and are often required to reinvest regularly to ensure that the standard is maintained
- Ararat does not currently have a branded property and there are very few available throughout the broader region so this could have a far wider regional appeal as well for various markets.

Hotel development precedent — indicative example only Quest Griffith, NSW

INVEST IN THE GRAMPIANS

CONTACT US NOW TO BE PART OF VICTORIA'S NEXT MAJOR INVESTMENT UPLIFT

Grampians Tourism was established in 2009 and is the peak industry body for tourism in the Grampians region and is directly supported by the Victorian State Government, Ararat Rural City, Horsham Rural City, Northern Grampians Shire and the Southern Grampians Shire, and over 300 industry partners.

Our primary purpose is to deliver a coordinated approach to investment attraction, product and industry development, and destination marketing for the region.

Our key assets include:

Destination Marketing: **www.visitgrampians.com.au**

Grampians Peaks Trail: **www.grampianspeakstrail.com.au**

Live The Grampians Way: **www.grampianslife.com.au**

Invest The Grampians Way: **www.investgrampians.com.au**

Marc Sleeman
Chief Executive Officer
Grampians Tourism Board Inc.
0437 530 148
ceo@grampianstourism.com.au

If looking to invest in the Grampians, you will find a region that is open for business and takes a very proactive approach to supporting investment and development.

Grampians Tourism works in partnership with local government and can assist with:

- Introductions to project proponents throughout our region
- Finding the right site/location
- Putting you in touch with key Council contacts
- Identifying partners, investors, developers and operators
- Helping to facilitate planning applications for key developments
- A full range of business support programmes, from helping with grant/loan assistance to linking with tertiary education facilities to help access apprentices and workers across the tourism sector.

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