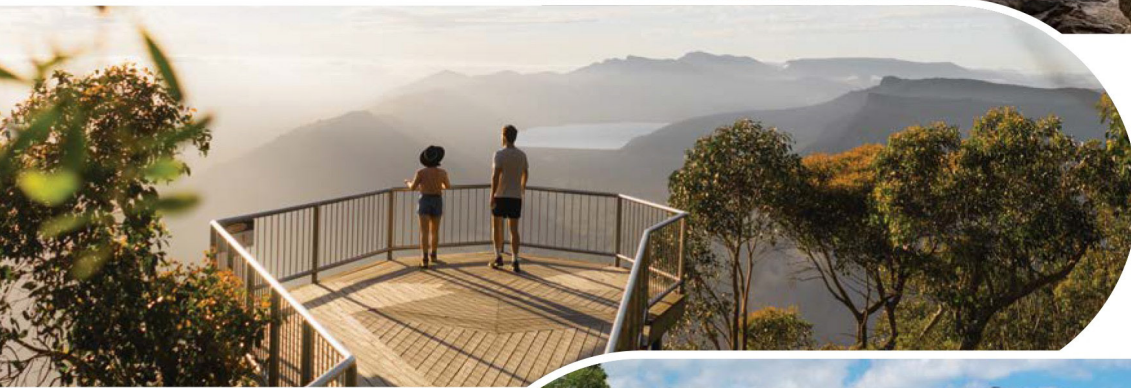


GRAMPIANS DESTINATION MANAGEMENT PLAN

2023-2030



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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

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 sites¹ 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.



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.







1.3. 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.	<ul style="list-style-type: none"> ▪ 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.	<ul style="list-style-type: none"> ▪ 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.	<ul style="list-style-type: none"> ▪ Ararat distillery ○ ▪ Chocolarium (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.	<ul style="list-style-type: none"> ▪ 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

<p>5</p> 	<p>Regional Accommodation</p>	<p>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.</p>	<ul style="list-style-type: none"> ▪ 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) ○
<p>6</p> 	<p>Identity, Marketing and Placemaking</p>	<p>Continue to grow awareness of the Grampians brand to ensure it is well-recognised and known as a compelling visitor destination.</p>	<ul style="list-style-type: none"> ▪ 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 ◆
<p>7</p> 	<p>Industry Development and Collaboration</p>	<p>Fostering the development of the Grampians' industry via ongoing engagement, collaboration, and training to develop a strong and visitor-ready industry across the region.</p>	<ul style="list-style-type: none"> ▪ Industry development training (customer service, product/experience development, social media, marketing, grant application writing) ◆
<p>8</p> 	<p>Supporting Infrastructure</p>	<p>Supporting visitor economy growth by advocating for investment into infrastructure, transport connections and visitor services.</p>	<ul style="list-style-type: none"> ▪ 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

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
<ul style="list-style-type: none"> ▪ 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. 	<ul style="list-style-type: none"> ▪ 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. 	<ul style="list-style-type: none"> ▪ 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.

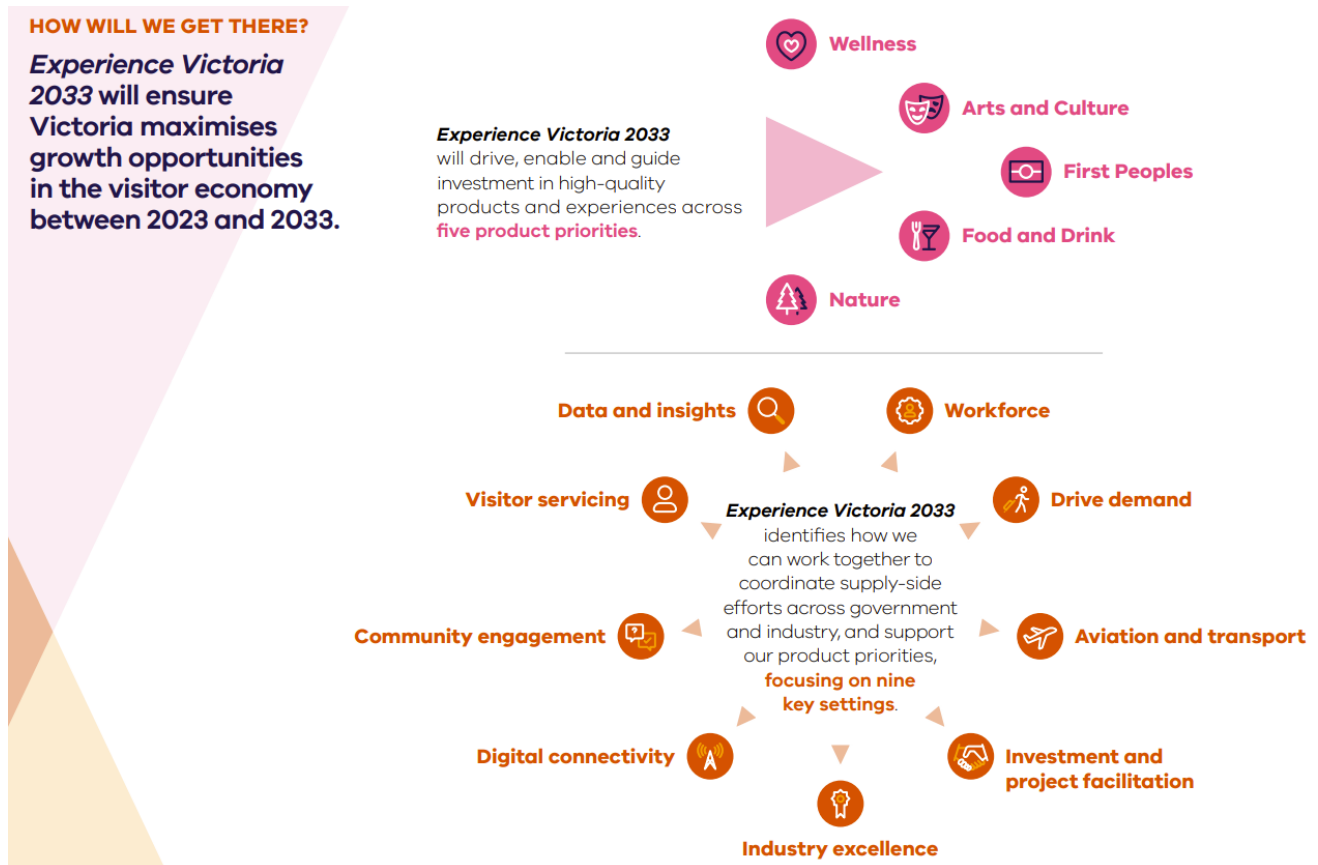
Additionally, the DMP's vision focuses strongly on the Grampians' strength as a nature-based destination and the potential to be recognised as Victoria's premier First Peoples' visitor destination.



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

Experience Victoria 2033 Product Priorities and Settings	Grampians DMP Themes
Wellness	Nature, Recreation and Wellness
Nature	
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 to 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.

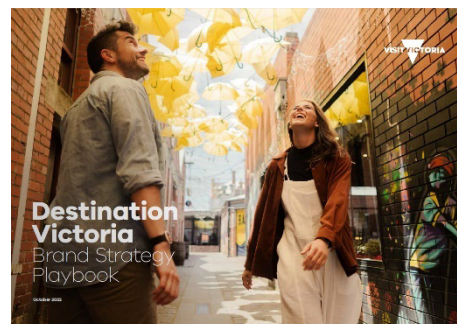


Figure 4: Regional sub-brand framework – Grampians³

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 <ul style="list-style-type: none"> • Mountain ranges • Hikes and bushwalking trails • Waterfalls and lookouts • Lakes • Scenic drives 	Passion for quality <ul style="list-style-type: none"> • Premium food and drink experiences • Wine region and cellar doors • Artisans 	Storied culture <ul style="list-style-type: none"> • First Peoples cultural experiences • Grass roots community culture • Towns and Villages • Art galleries and history
Proof points	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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

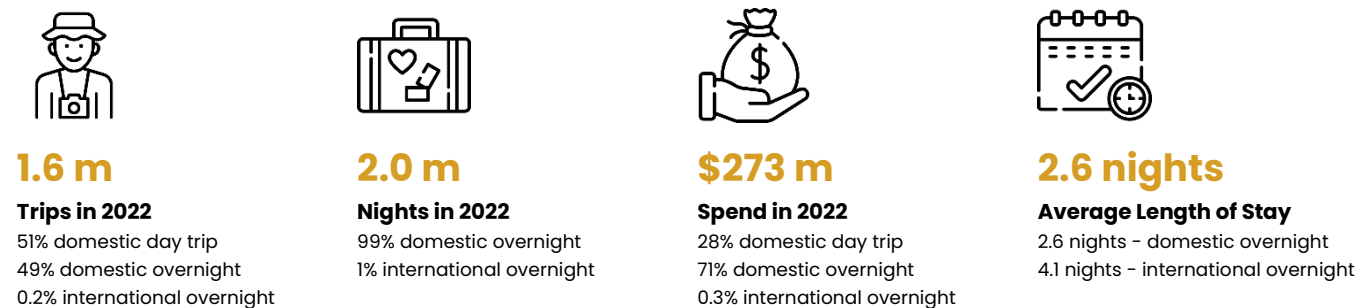
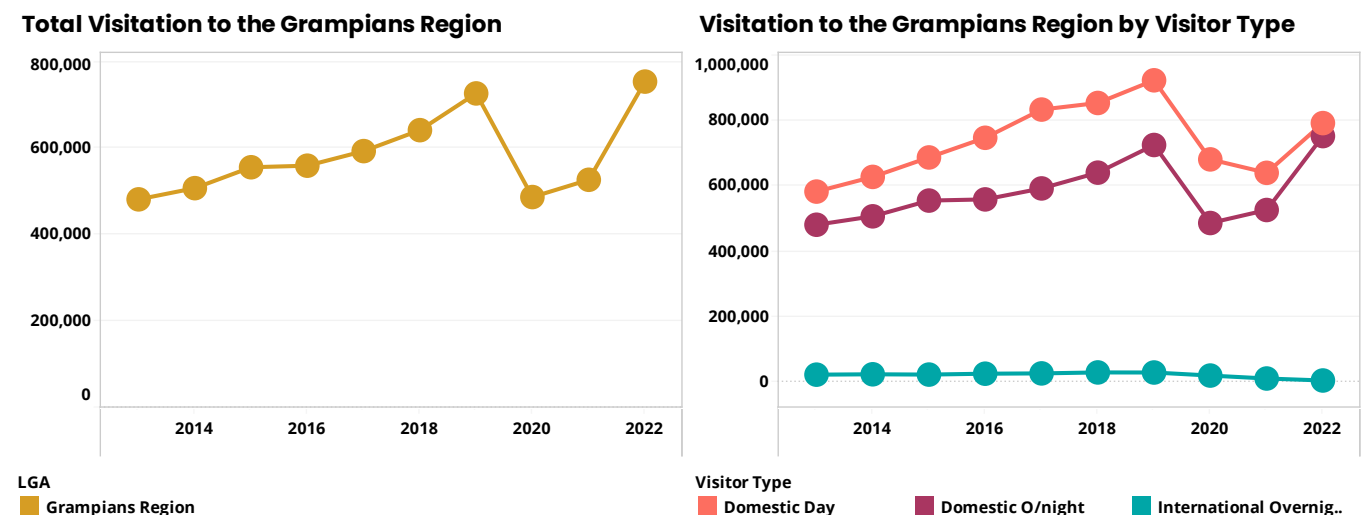


Figure 6: Total Visitation, 2013-2022⁵



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.

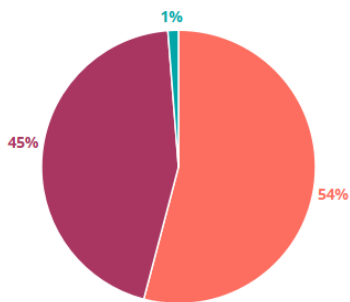
The Grampians' visitor economy has historically been dominated by domestic travel and largely domestic day trip travel. Domestic day trip travel has comprised more than half of all visitation over the past ten years (see Figure 7). This is likely driven by the region's proximity to major urban population 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

Visitor Type to the Grampians Region



2.2.3. Historic Visitor Spending

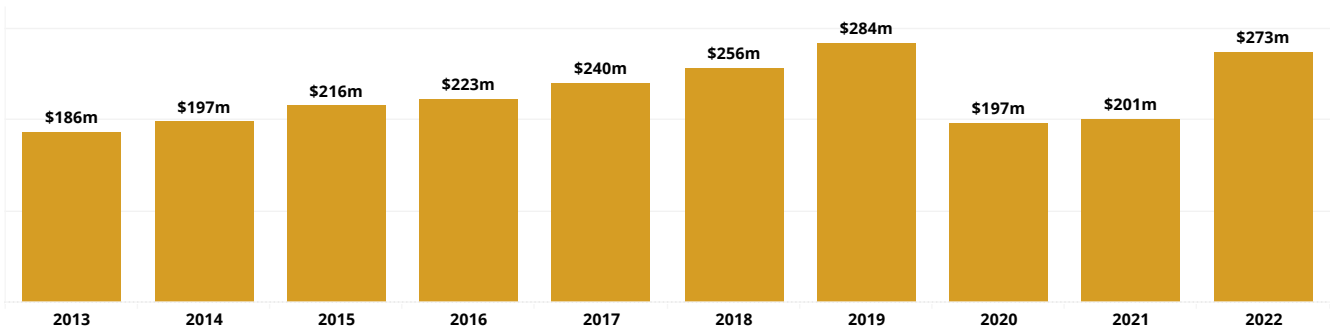
While the day trip market forms an important component of the visitor economy, it typically is relatively low yielding, accounting for only 29% of visitor spending in the region in 2022, despite comprising more than half of total visitation. Domestic day trippers, on average, spent \$98 in the region, 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:

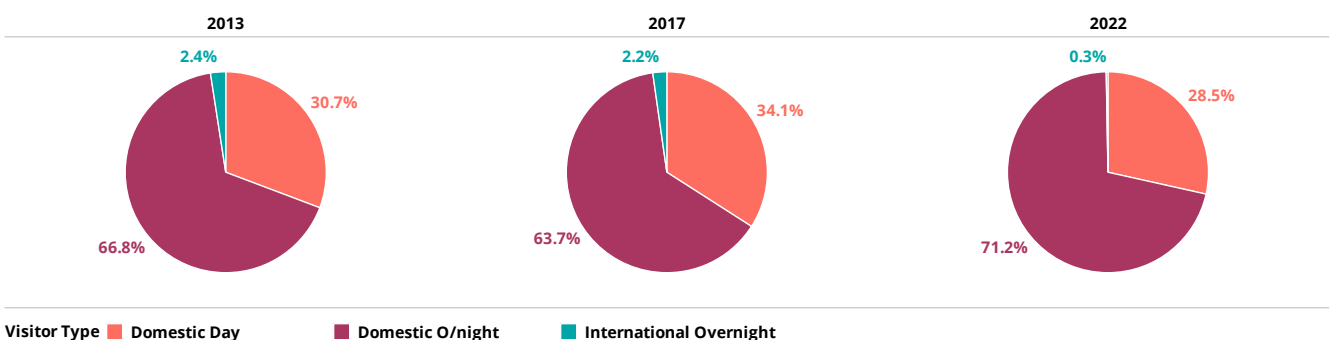
- encouraging investment into upgrading existing accommodation stock and the development of new accommodation;
- developing new, visitor-ready, and bookable experiences and products;
- enhancing infrastructure to support the development of the visitor economy;
- creating bookable packages to support 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, 2013-2022⁷

Total Visitor Spend in the Grampians Region



Spend by Visitor Type in the Grampians Region



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

⁷Based 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

Origin of Domestic Visitors to Grampians Region

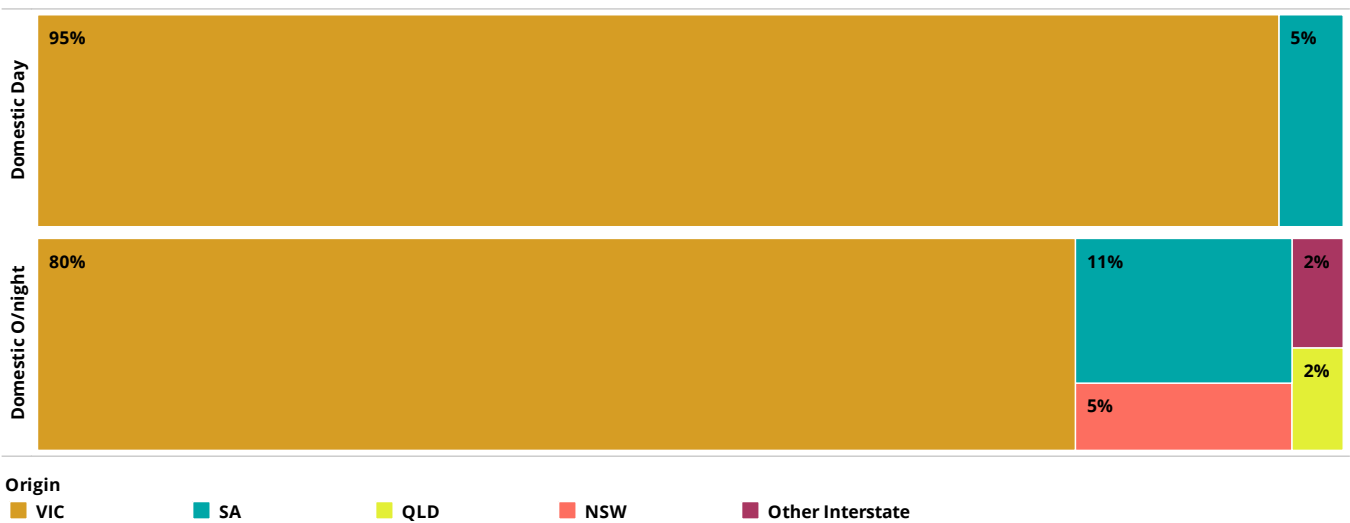
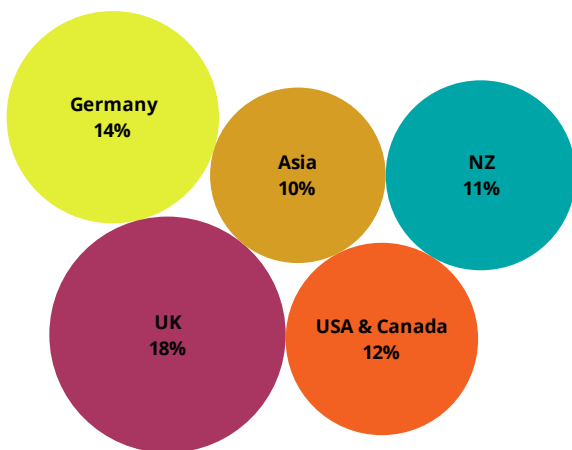


Figure 10: International overnight visitor origin (7-year average, 2013-2019)⁹



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 Strengths¹¹

Primary Strengths

Nature-based Experiences



Recreation

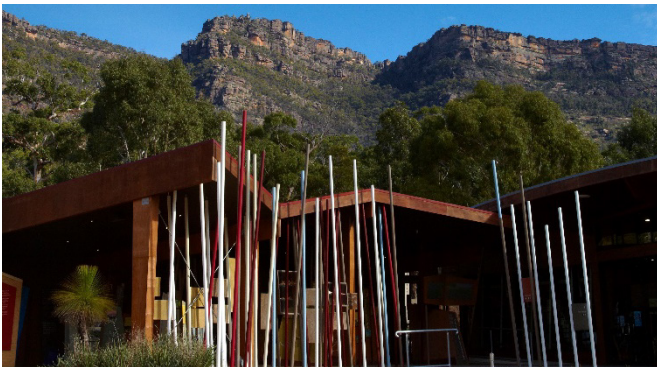


Lakes and Waterways

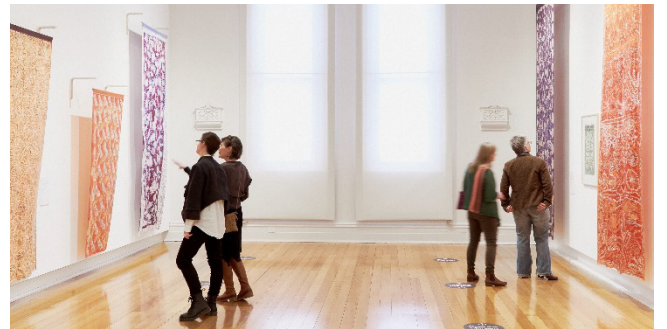


Emerging Strengths

First Peoples



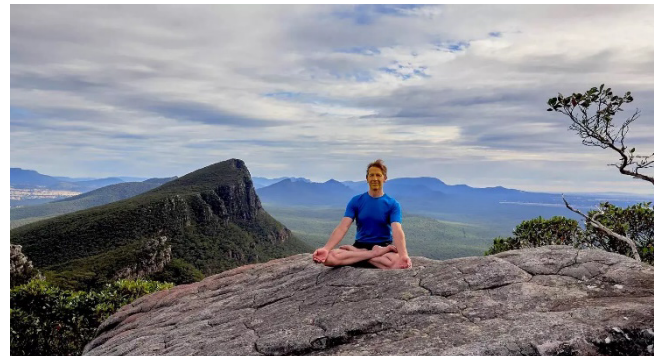
Art, Culture and Heritage



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 sources¹²: 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 products¹³ 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

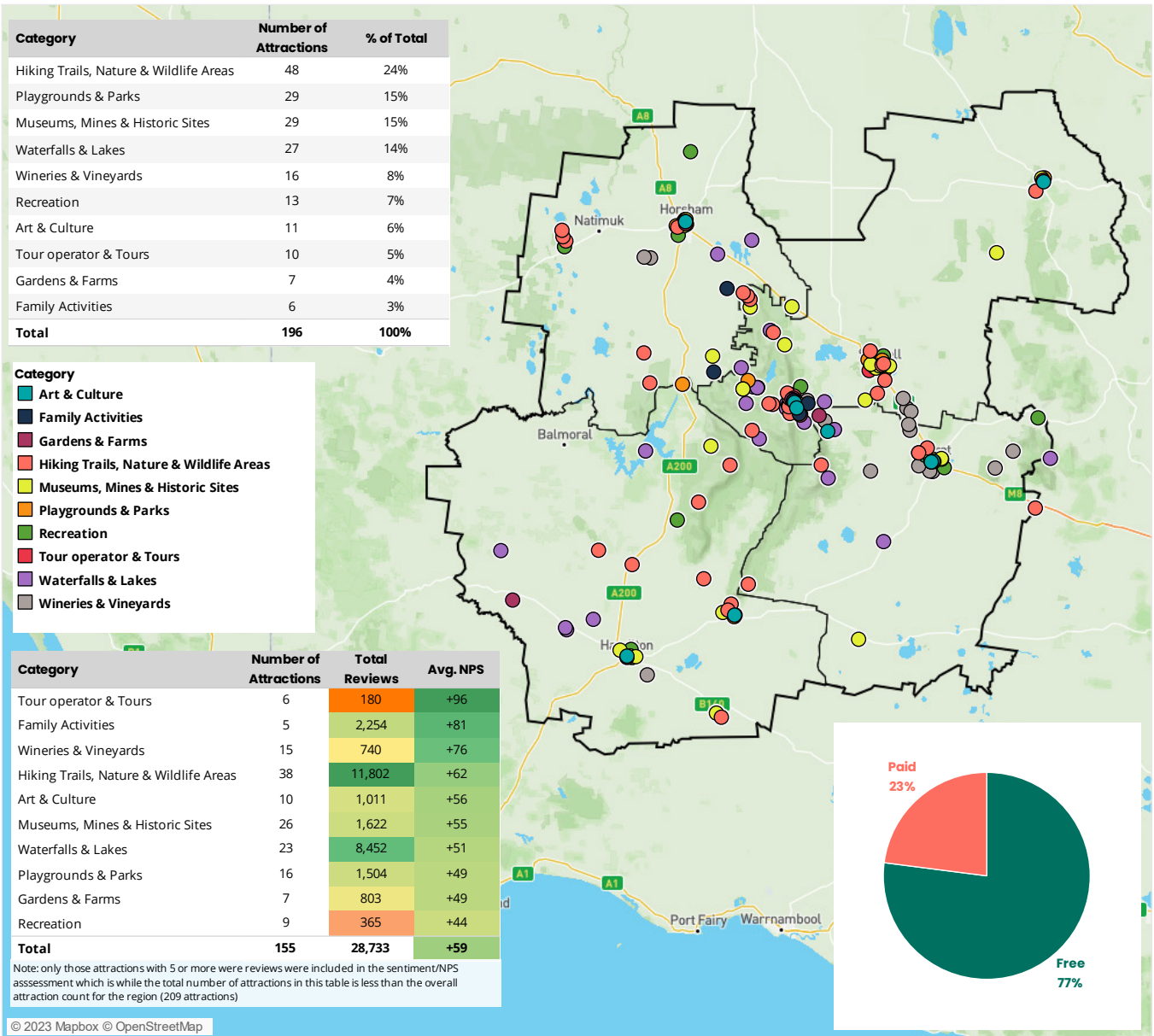
A sentiment assessment was also completed on products that had more than five reviews available (see Appendix 3 for an overview of how net promoter scores [NPS] are calculated). The results are summarised in Figure 13 and demonstrate the following.

- 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.

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



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 sources¹⁴: 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.

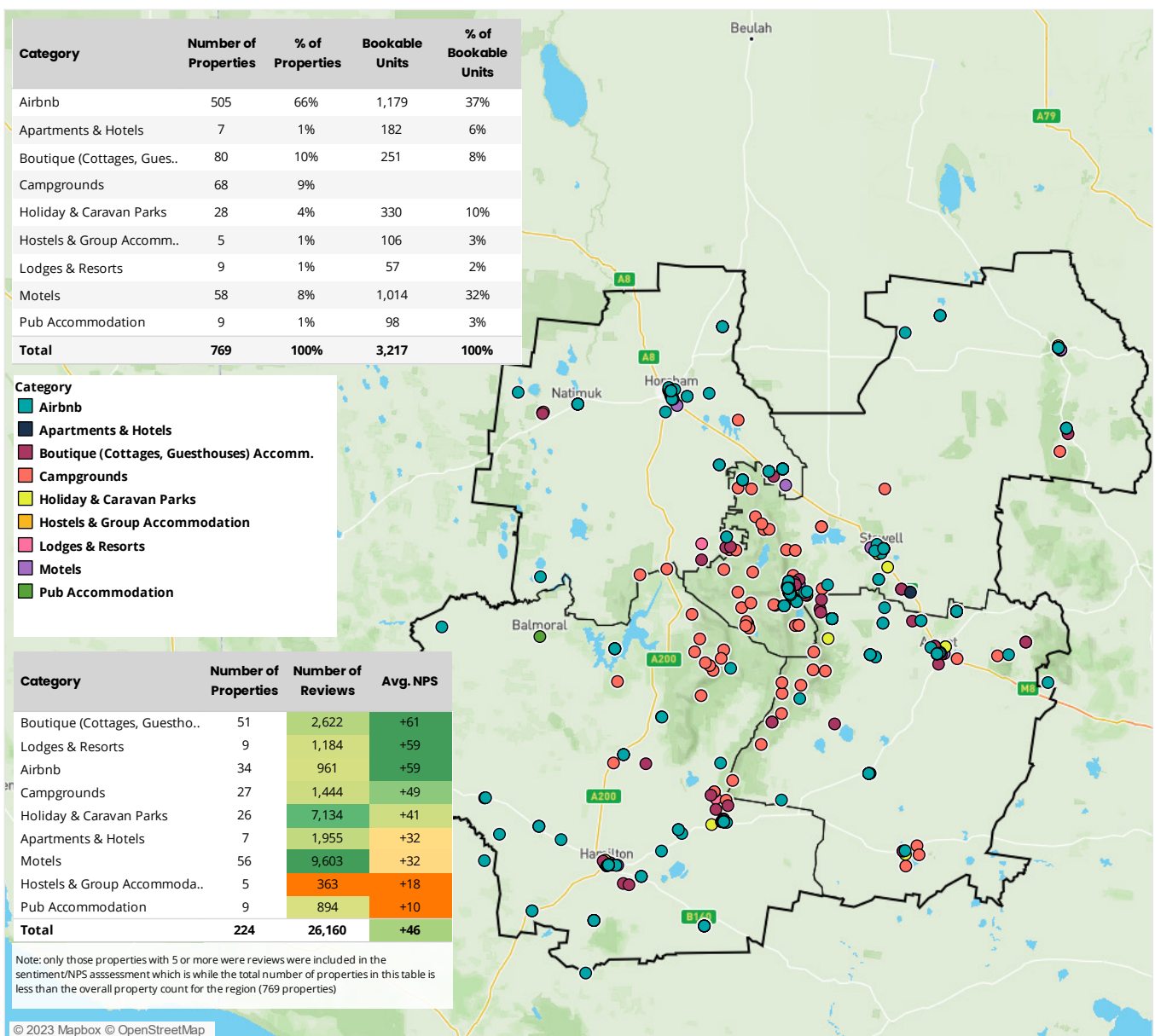
- The region's commercial accommodation product receives an overall NPS of +46, based on 26,160 reviews. While this falls within the 'good' range for NPS scores, based on Stafford's work completing accommodation audits throughout the country, this is towards the lower end of overall average NPS ratings.
- 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 example¹⁵:
 - 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 Audit¹⁶



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).

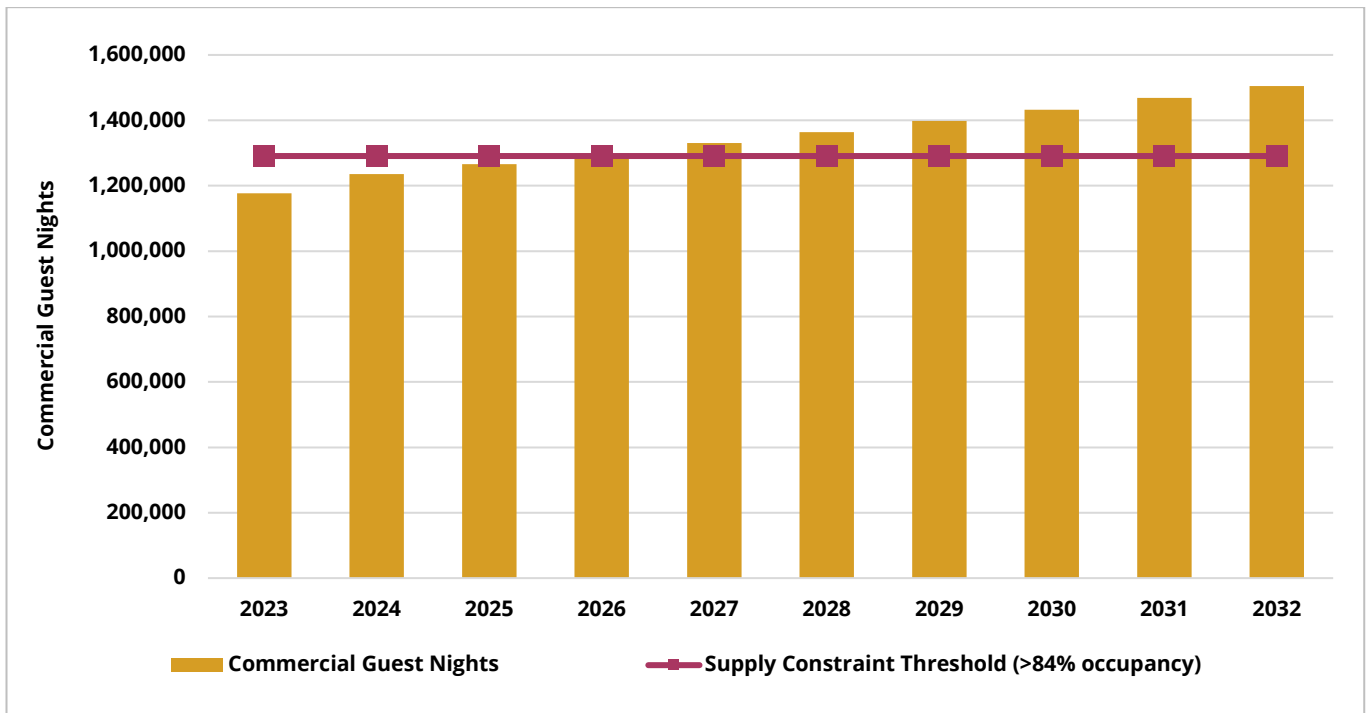
Figure 15 shows the current commercial accommodation supply in the Grampians, measured against demand forecasts for medium scenario growth. This illustrates that an estimated regional occupancy threshold of 85% is reached by 2026 (this level of occupancy reflects when new development and capacity are 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
 <p>Market size: 1.66m Victorians¹⁷</p> <p>Profile:</p> <ul style="list-style-type: none"> 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. <p>What the market wants:</p> <ul style="list-style-type: none"> 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. 	 <p>Market size: n/a</p> <p>Profile:</p> <ul style="list-style-type: none"> 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. <p>What the market wants:</p> <ul style="list-style-type: none"> 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

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

Image credit: Royal Mail Hotel, Dunkeld, Visit Victoria



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
	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.
	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.
	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.
	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.
	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.
	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.
	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.
	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.

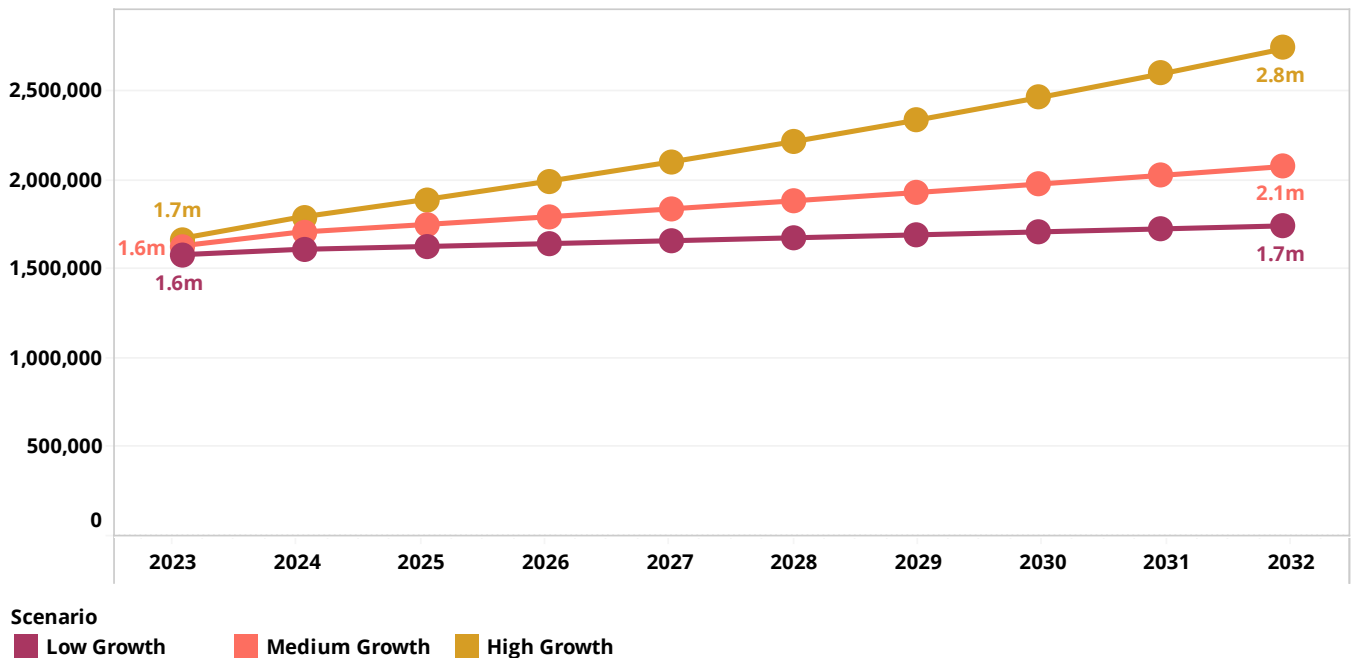
The data reflects the following.

- 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 – 2032¹⁸



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

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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 term
○	Ararat Dirt Mountain Bike 12 Hr Race	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Introduce a skate park event that leverages the high-quality Ararat skate park and engages youth. 	\$45k	ARCC	Medium term
○	Ararat Sky Park	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Identify potential enhancements that could grow the Ararat Hill Climb event and its profile. 	\$250k	ARCC	Medium term
○	Dunkeld geothermal bathing experience ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Promote opportunities for gliding and fixed aviation events. 	\$65k	HRCC	Medium term
○	Indoor activity centre ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Commission the development of the Great Trail Implementation Plan (Stage 1) 	\$500k	ARCC, HRCC, NGSC, SGSC, GT	Medium term
○	Hamilton Botanic Garden playspace profiling	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Identify potential enhancements that could further grow the Stawell Gift event and its profile. 	\$95k	NGSC	Short-medium term
○	The Bath House Pomonal ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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 upgrade²³:

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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> Continue to support the strategic partnership committee and advocate for the development of Brambuk. 	\$7.0m	PV, TOs	Short-medium term

¹⁹ <https://www.dceew.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.

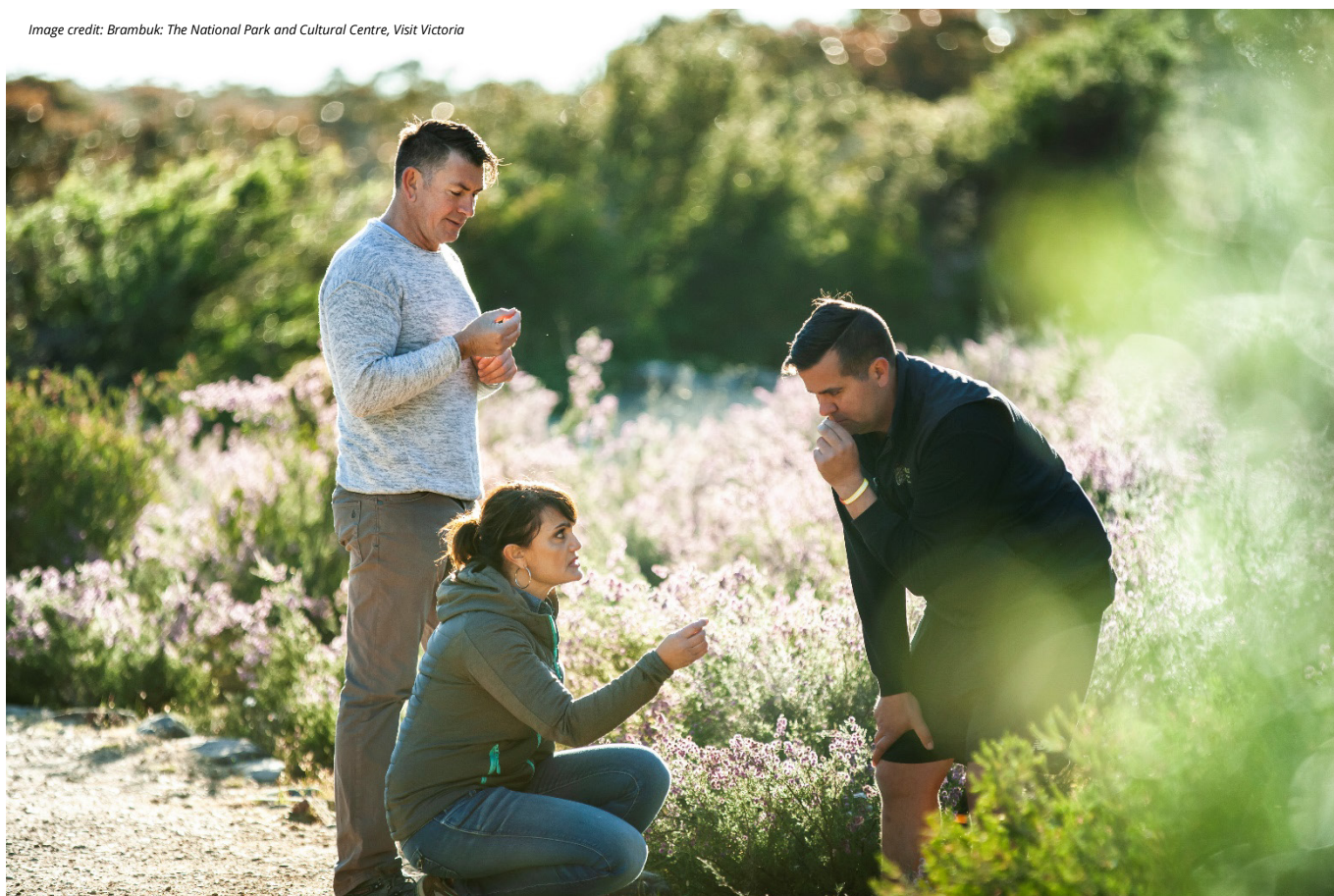
²⁴ The project is supported by the Victorian Government through the Department of Jobs, Precincts and Regions.

²⁵ The project is supported by the Victorian Government through Creative Victoria.

Type	Recommendation	Action	Estimated Cost	Who	When
◆	First Peoples' place names	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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 'Chocolatarium' 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 ★	<ul style="list-style-type: none"> 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) ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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) ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> Continue to support and advocate for the planned redevelopment of the Hamilton Gallery. 	\$4.0m	SGSC	Medium term
○	Hamilton Gardens weekends (public and private)	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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



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 pools²⁸ 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 ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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) ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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) ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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) ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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) ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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) ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Identify opportunities to further profile and enhance the Haven Market. 	\$25k	HRCC and operators	Short-medium term
◆	Grampians (Gariwerd) National Park Private Investment Strategy	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> Secure additional funding for a dedicated promotional campaign. 	\$120k	GT, RDV	Short term
◆	Tourism planning zones study	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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) ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Re-establish the Southern Grampians local tourism group. 	\$20k	GT, SGSC, industry	Short-medium term
◆	Victorian Training Guarantee (VTG) program awareness and participation	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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

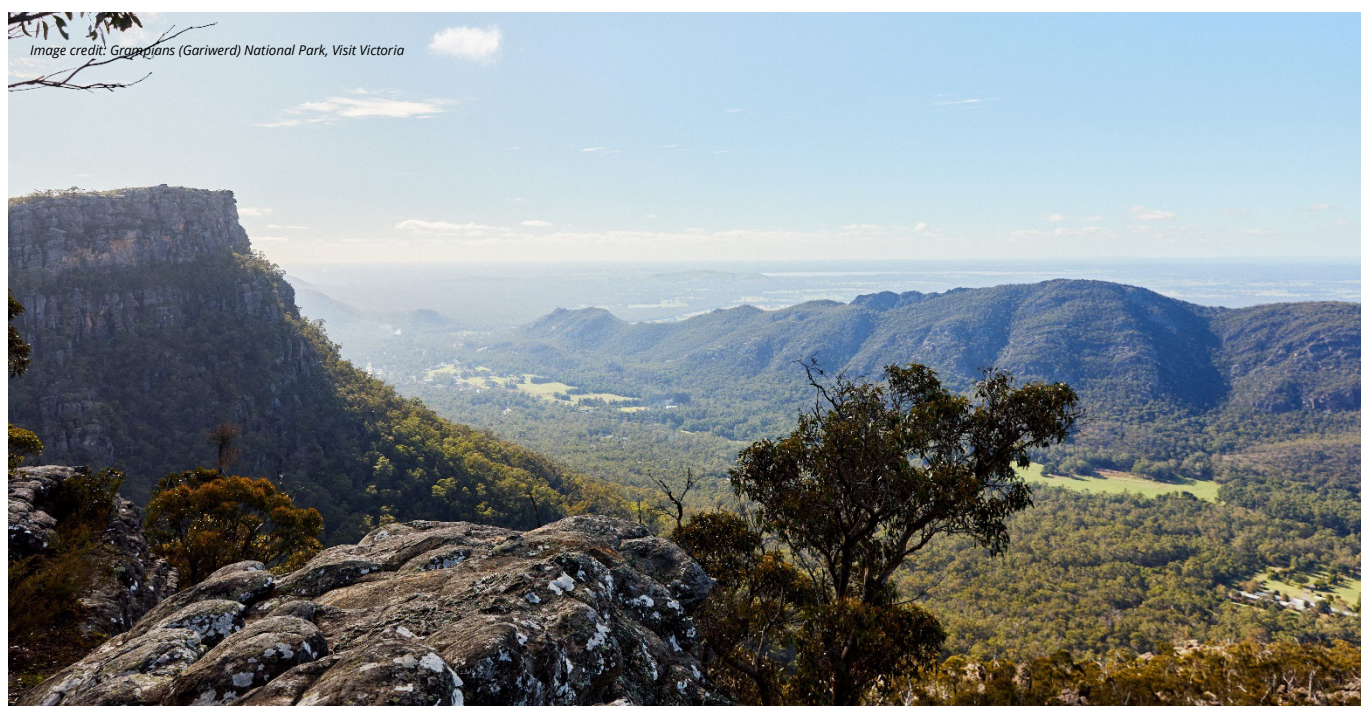
Type	Recommendation	Action	Estimated Cost	Who	When
◆	Advocate for upgraded Horsham passenger rail	<ul style="list-style-type: none"> Continue to advocate for the upgrade of Horsham's passenger rail to introduce a passenger service back into Horsham 	\$100k	HRCC	Short term
◆	Advocate for peak season public transport options around the Grampians ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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) ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Continue to progress with the completion of the Dunkeld visitor hub project 	\$1.5m	SGSC	Medium term
○	Green Hill Lake walking track development	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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.)	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Continue to advocate for Heath Street upgrades and redevelopment 	\$25.0m	NGSC	Medium – long term
○	Horsham Aerodrome redevelopment ★	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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



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 or 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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Part 5: Appendices



Appendix 1 Full Survey Questions



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).

- | | |
|--|---|
| <input type="radio"/> Food and beverage | <input type="radio"/> Professional services (accounting, marketing, media etc.) |
| <input type="radio"/> Tourism accommodation | <input type="radio"/> Events |
| <input type="radio"/> Tourism attraction | <input type="radio"/> Council personnel |
| <input type="radio"/> Retail | <input type="radio"/> Parks Victoria personnel |
| <input type="radio"/> Transport | <input type="radio"/> Interested community member |
| <input type="radio"/> Other (please specify) | |

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

- | | |
|---|---|
| <input type="checkbox"/> Grampians Tourism Partnership | <input type="checkbox"/> Local newspapers / magazines |
| <input type="checkbox"/> ATDW Listing | <input type="checkbox"/> Media outside of the region |
| <input type="checkbox"/> Google Maps Listing | <input type="checkbox"/> Local radio / TV |
| <input type="checkbox"/> Social media (e.g. Facebook, Instagram) | <input type="checkbox"/> Mail and email-outs |
| <input type="checkbox"/> Online business directory | <input type="checkbox"/> Media famils |
| <input type="checkbox"/> Community newsletter | <input type="checkbox"/> Not applicable (no marketing or promotion) |
| <input type="checkbox"/> Digital Marketing (e.g. SEM, online advertising etc) | |
| <input type="checkbox"/> 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.

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

* 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.

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

* 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	<input type="text"/>
Beverage (wine, beer, distilling etc)	<input type="text"/>
Accommodation	<input type="text"/>
Nature-based (e.g. infrastructure, tours, experiences etc)	<input type="text"/>
Cycling (e.g. specific cycle loops, locations for mountain biking etc)	<input type="text"/>
Arts and culture (e.g. museums, galleries, interactive experiences, First Nations experiences etc)	<input type="text"/>
Other (please specify)	<input type="text"/>

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	<input type="text"/>
Public transport	<input type="text"/>
Aviation	<input type="text"/>
Digital infrastructure (i.e. telecoms)	<input type="text"/>
Services infrastructure (e.g. water, sewer)	<input type="text"/>
Visitor servicing (i.e. visitor information, signage etc)	<input type="text"/>
Other (please specify)	<input type="text"/>

* 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

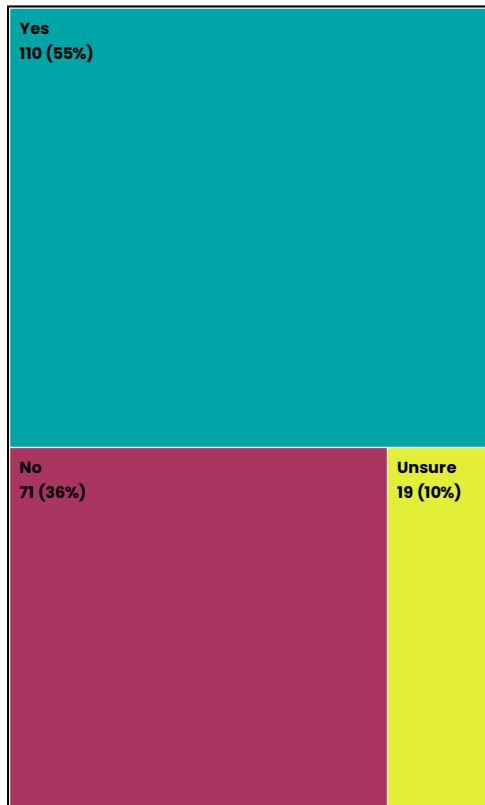
Response Rate

Question 1

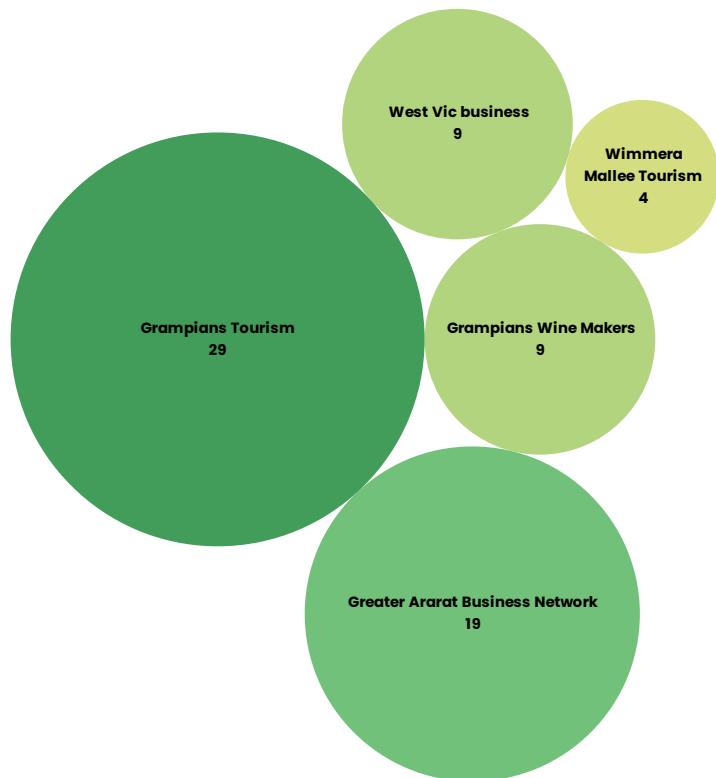
Name – Confidential

Question 2

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

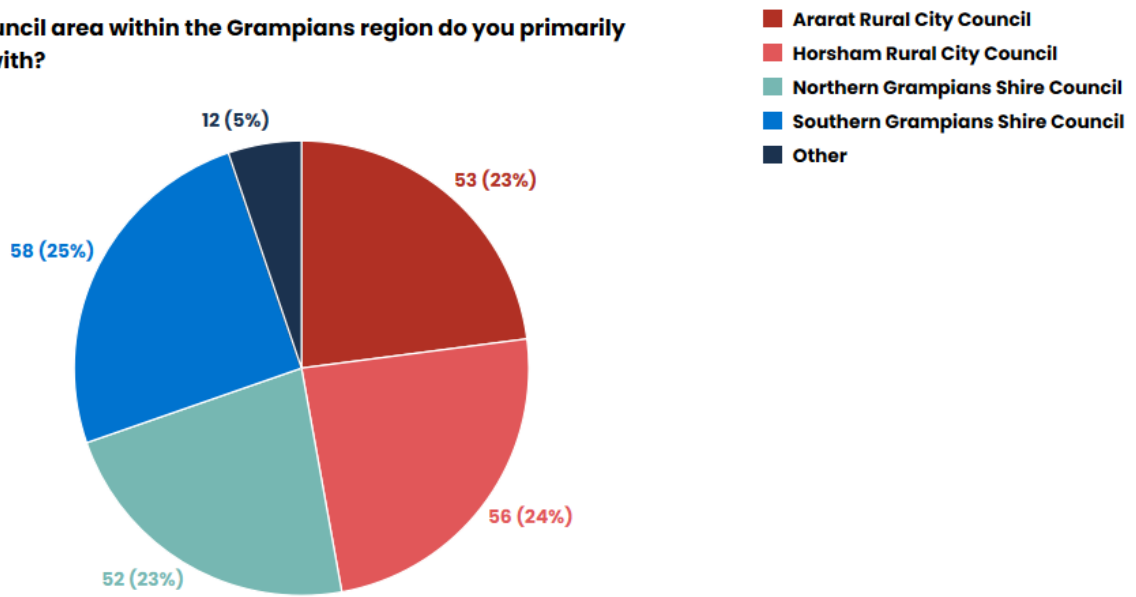


Top Networks respondents belong to



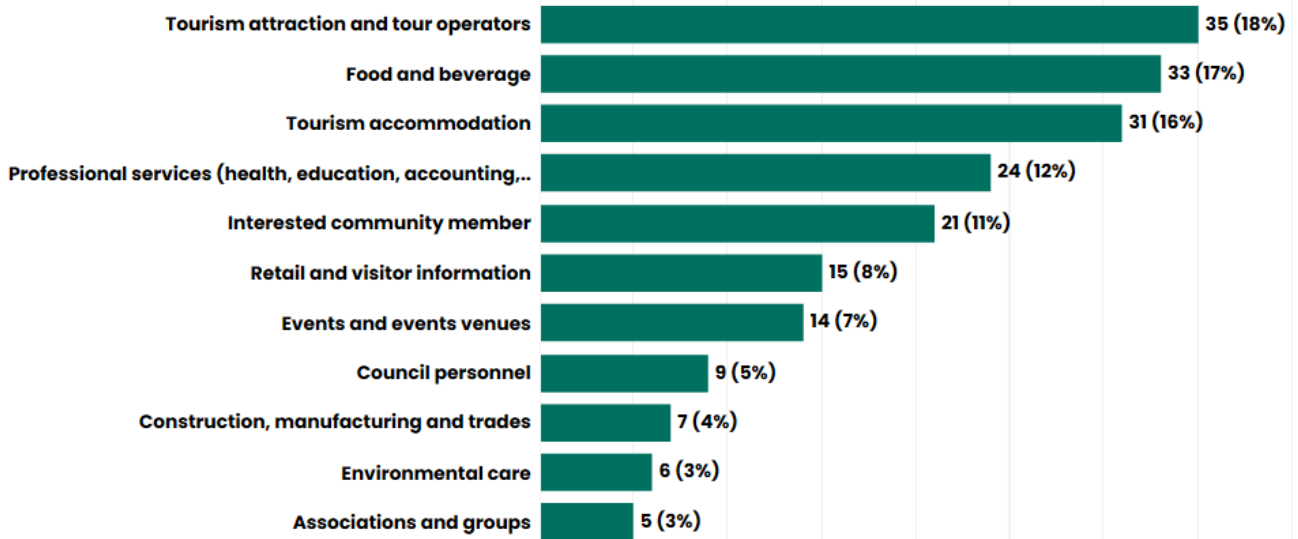
Question 3

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



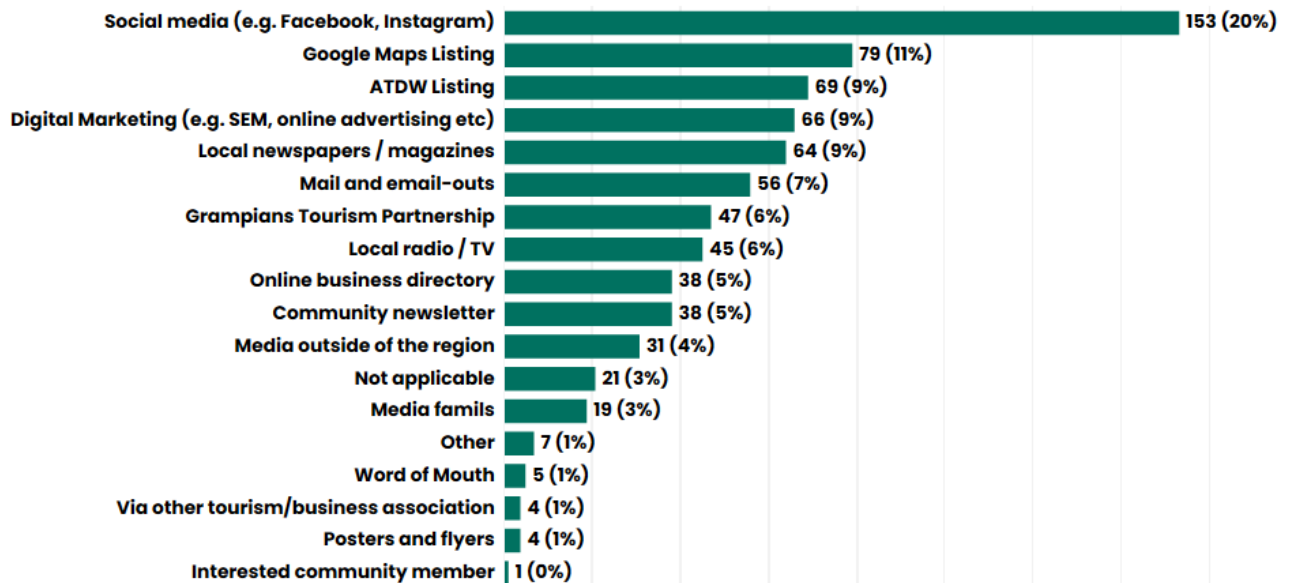
Question 4

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)



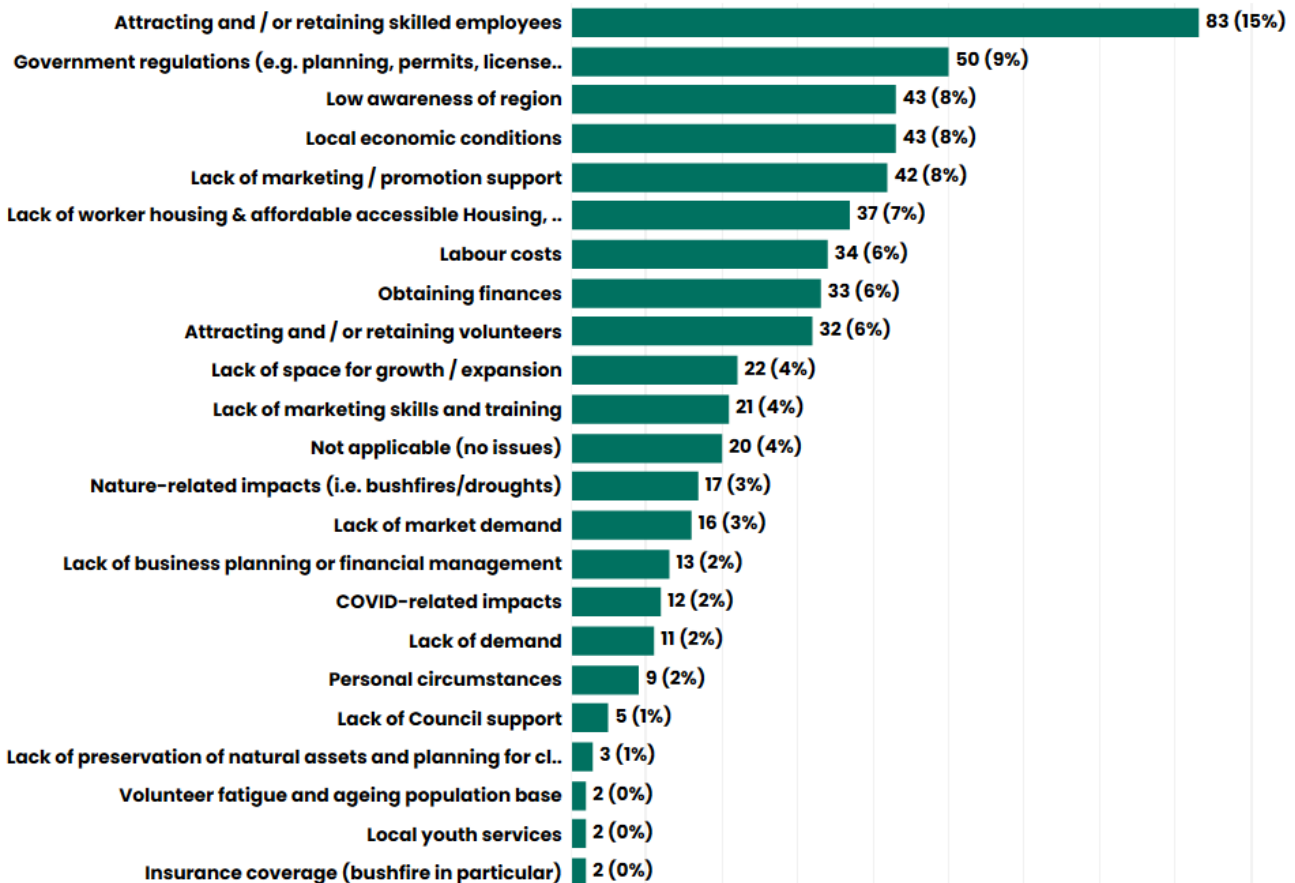
Question 5

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



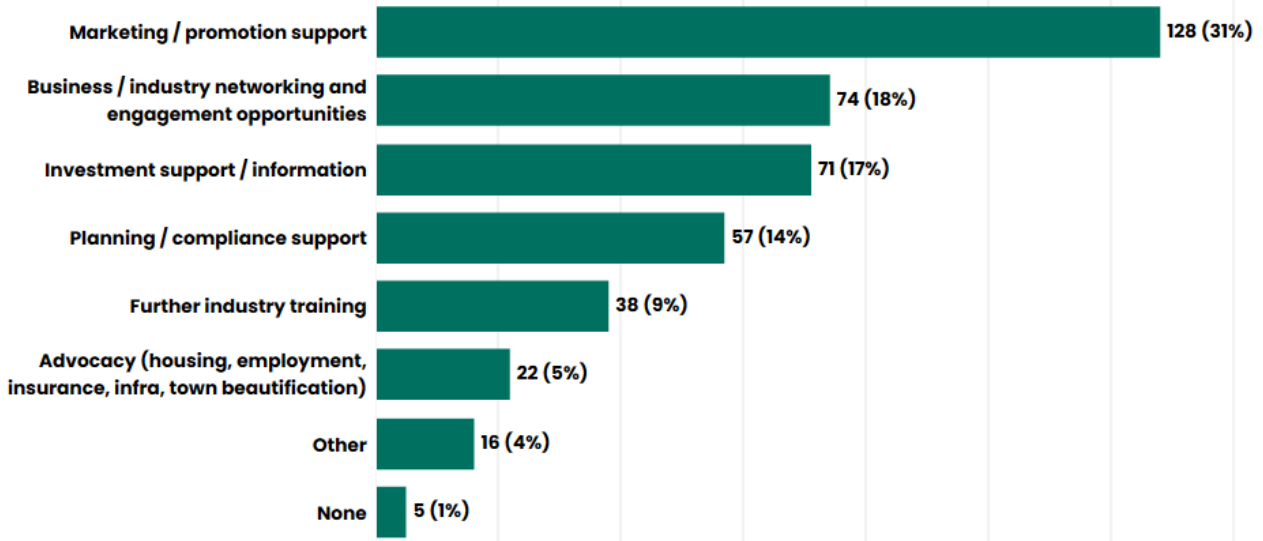
Question 6

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



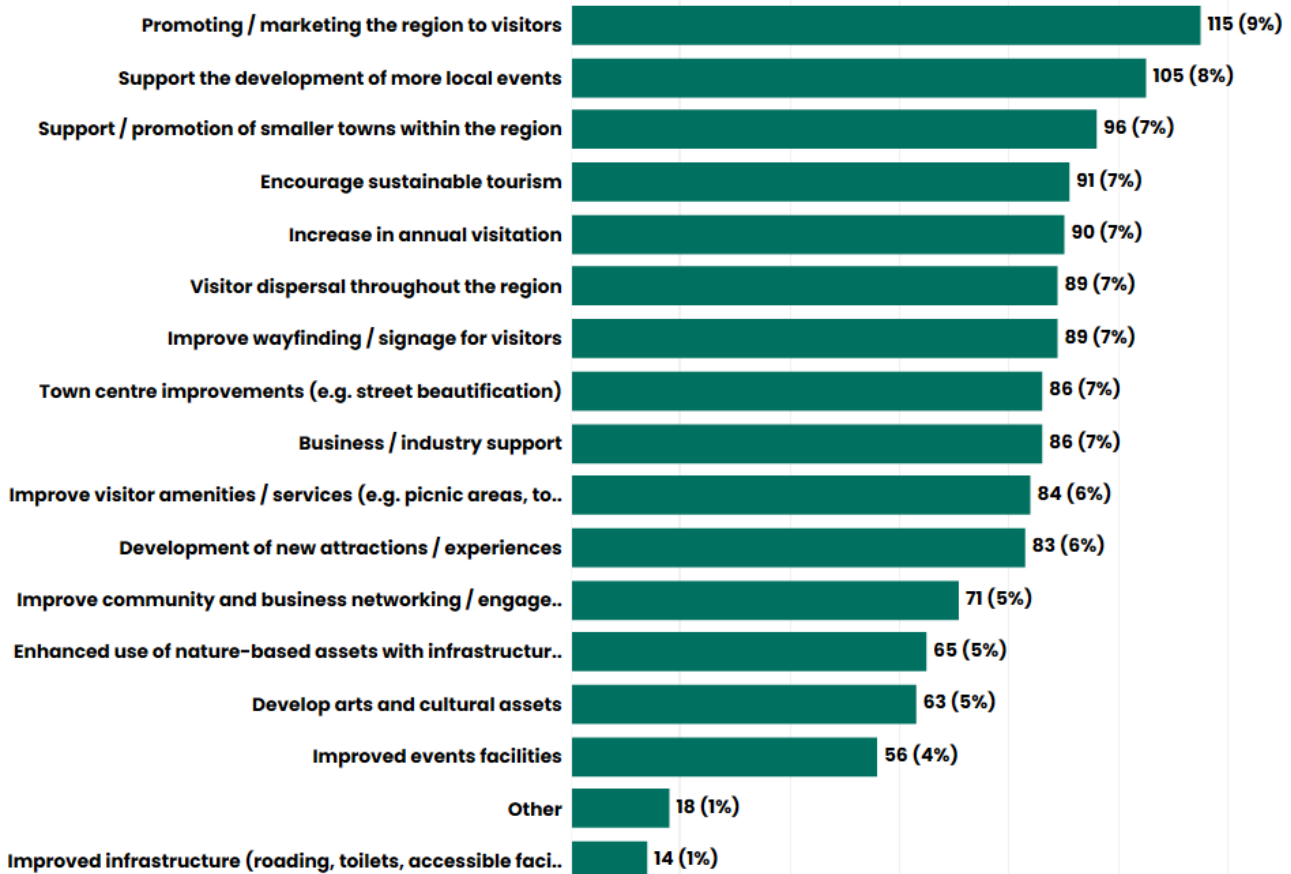
Question 7

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.



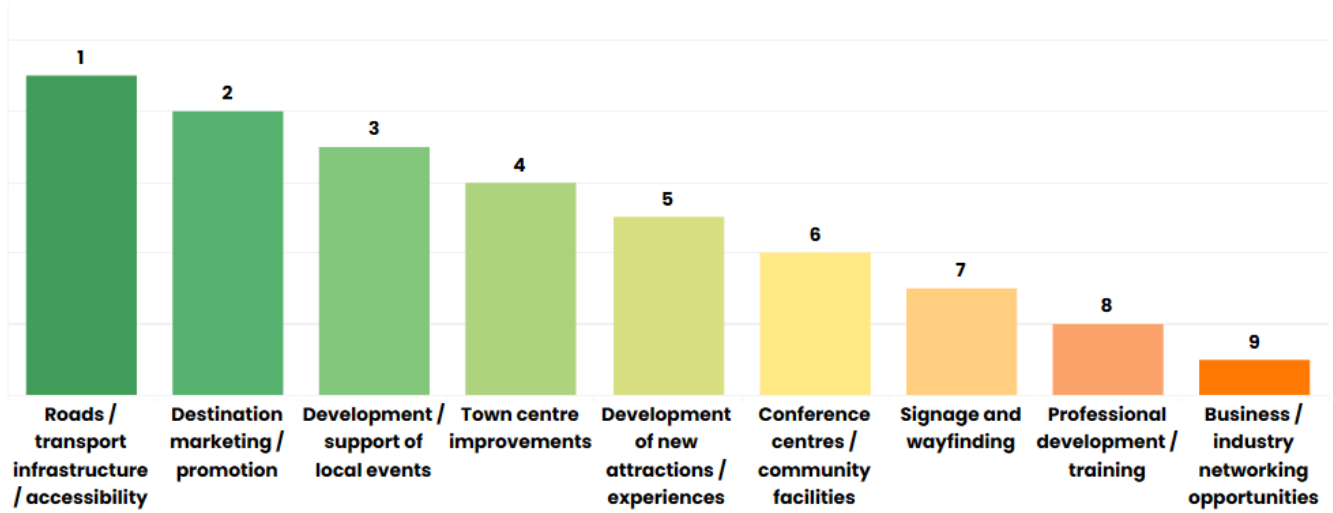
Question 8

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



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

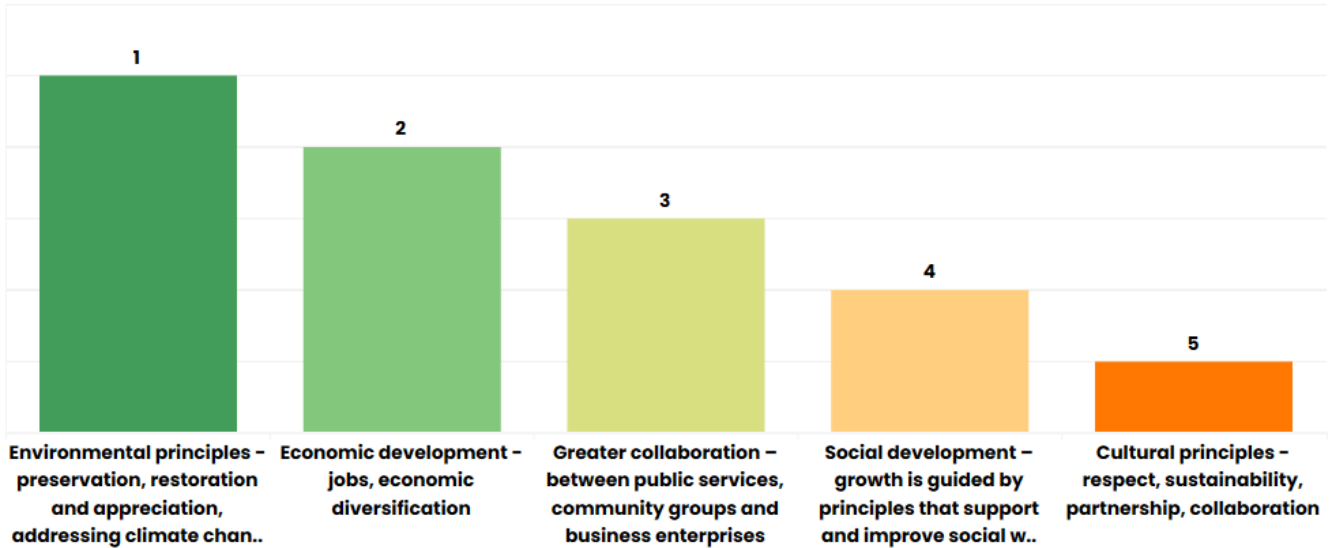
Feedback for the **Southern Grampians Shire Council** included the following:

- 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.

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;
- 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 Google³⁰ 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 None	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 Peshurst 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 Peshurst 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

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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

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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

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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

