

# Grampians Tourism Destination Plan & Investment Roadmap

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**AECgroup**

## Document Control

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# Executive Summary

## What is a Destination Plan & Investment Roadmap?

The *Grampians Tourism Destination Plan & Investment Roadmap* outlines projects and priorities that grow the tourism potential of the Grampians Region as a whole, rather than just redistribute existing demand in the region. It has been developed through market research, product analysis and consultation with industry and stakeholders in the Grampians Region.

## What does the Grampians Region have to offer?

The Grampians Region has developed a significant destination profile through its values for nature-based and outdoors adventure activities. Surrounding the Grampians National Park are extensive agricultural areas and their service towns. Tourist visitation to these areas is predominantly driven through food, wine and heritage-related product. Characteristics of the current and targeted visitor markets include:

Visitation	<ul style="list-style-type: none"> <li>• 1.6 million in 2012, \$946 million in GRP (22% of the economy)</li> <li>• 66% intrastate, 25% interstate, 9% international</li> <li>• Growth in daytrips, length of stay, visitor nights, overnight visitors higher than regional Victoria</li> </ul>
Tourism Activities	<ul style="list-style-type: none"> <li>• Lower proportions of holiday or leisure visitors than regional Victoria</li> <li>• Higher proportions engage in nature-based activities</li> <li>• Lower proportions engage in eating out, entertainment, shopping (less flow on spending)</li> </ul>
Target Markets	<ul style="list-style-type: none"> <li>• Focussed on Lifestyle Leaders (29% of Australia's population)</li> <li>• Dislike poor quality accommodation, historical attractions, passive products</li> <li>• Like New information, New products / experiences, Staying with friends and relatives, Short trips (high volume), Individuality, Authenticity, Restaurants / international food and wine, National Parks / wilderness, Movies / cinema, Luxury / comfort, Arts / cultural events</li> </ul>
Products & Experiences	<ul style="list-style-type: none"> <li>• Focused on the target market</li> <li>• Attractions (natural, manmade), Activities (Nature based, Arts &amp; culture, Indigenous, Self drive, Family, Food &amp; wine), Access (self drive), Accommodation, Amenities (Food, dining &amp; function venues, Winery &amp; farm product, Retail product, Utilities &amp; key services), Awareness</li> </ul>

## What are the Grampians Region tourism outcome gaps?

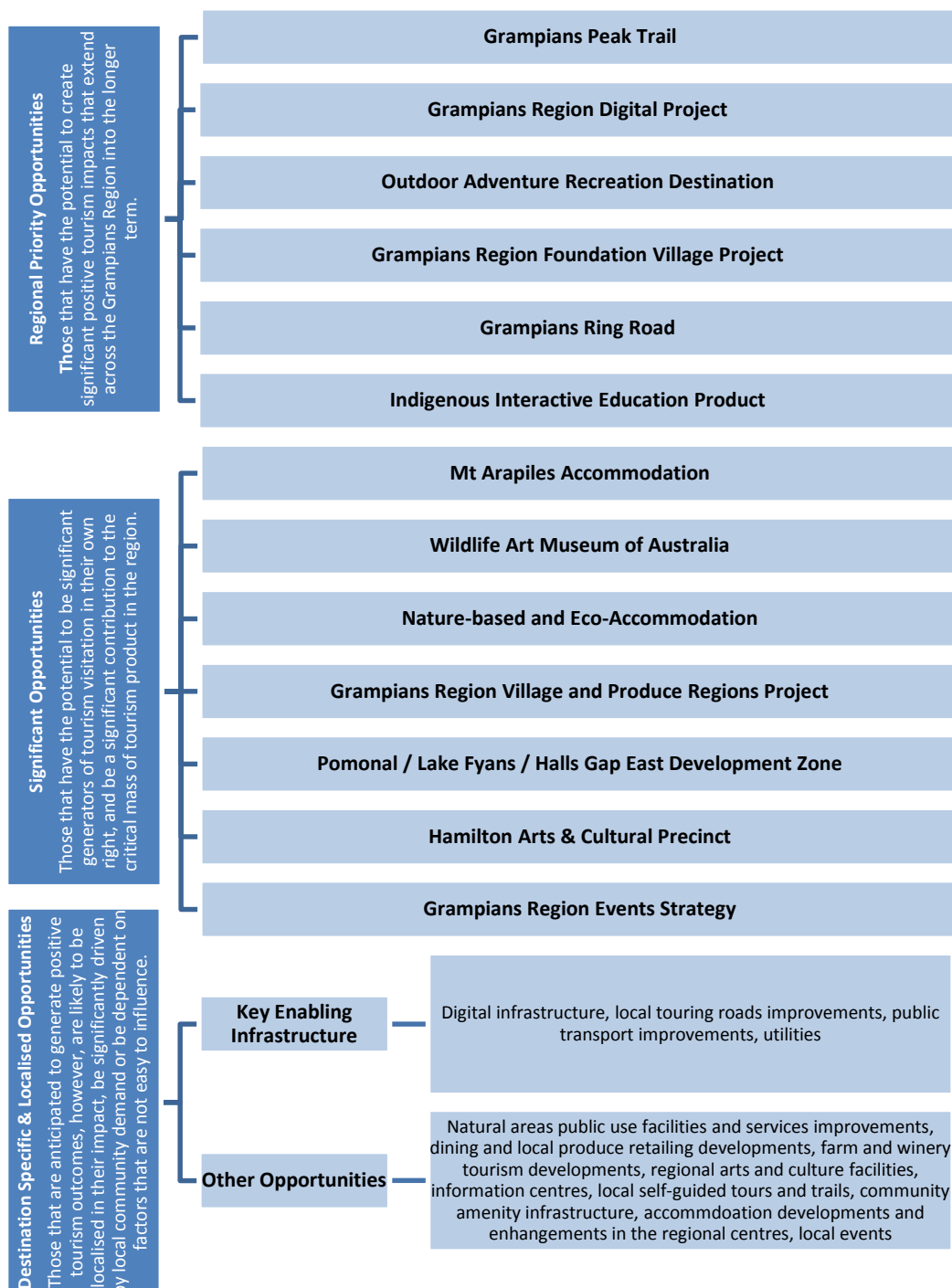
To identify tourism outcome gaps two areas of primary research were undertaken. Firstly, qualitative market research with consumers which identified current consumer perceptions of the Grampians Region including strengths, weaknesses, barriers to visitations and gaps. Secondly, a comprehensive audit of tourism products and experiences throughout the Grampians Region to appropriately profile available tourism products and related experiences relative to the *Lifestyle Leaders* target market.

Key challenges for the Grampians Region were identified as:

- Addressing deficiencies relative to changing consumer expectations for the Grampians Tourism Region (e.g. presentation of towns and villages and accommodation standards).
- Enhancing the key product strength of the region (e.g. nature and the mountains) to improve iconic / hero status with target markets.
- Filling investment gaps around additional product opportunities relative to the strengths and character of the region (e.g. farm & wine, water and rural culture).
- Improving interaction between Halls Gap and the rest of the Grampians Tourism Region in a way that enhances dispersal and the overall tourism offering.
- Improving the communication of the region's tourism offering to its target market.

## What are the investment opportunities?

The *Investment Roadmap* provides a clear outline of the opportunities and investment priorities of the Grampians Region for both public and private sector interests. Projects vary from advanced plans that have been studied and started, initial stages of investment to new concepts and regional approaches. The opportunities are:



### **How will the opportunities be progressed?**

All of the investment priorities presented in the *Investment Roadmap* involve significant challenges to deliver. The role of Grampians Tourism is to provide voice for these important initiatives, enabling greater challenges to be addressed than possible by private industry or individual stakeholders. As such, Grampian Tourism can advocate, facilitate, plan and provide services.

Further detailed investigation and implementation work will need to be undertaken around leading opportunities that do not have existing supporting studies. This work will:

- Develop key strategies and actions required to fulfil market investment in stated projects.
- Develop business cases that detail a clear path for project investment conversion.
- Practical processes for taking action to progress opportunities.

A number of the opportunities will be subject to further study in part B of the *Investment Roadmap*.

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# 1. Introduction

Grampians Tourism Inc. is a regional tourism body established in 2009. The core aim of the organisation is to develop a coordinated approach to marketing, product development, infrastructure investment and industry development for the Grampians Tourism Region (Grampians Region).

The Grampians Region has identified its core product categories as well as product categories for future development. These product categories are focussed on addressing a core market segment based on sensation-seeking type personality types (i.e. Tourism Australia's *International Experience Seeker* and Tourism Victoria's domestic *Lifestyle Leaders*).

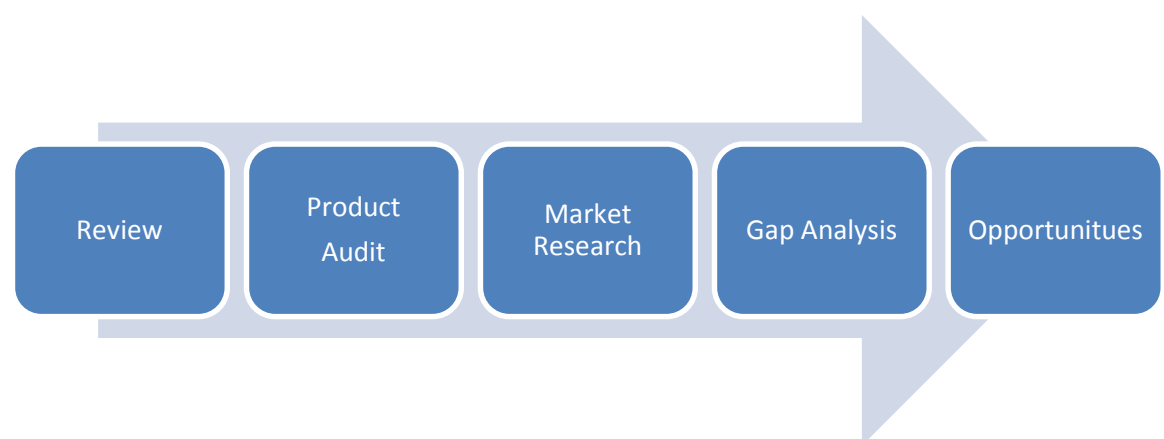
The *Grampians Tourism Destination Plan & Investment Roadmap* outlines projects and priorities that grow the tourism potential of the Grampians Region as a whole, rather than just redistribute existing demand in the region.

## 1.1 Destination Plan & Investment Roadmap Development

The *Grampians Tourism Destination Plan & Investment Roadmap* has been developed through market research, product analysis and consultation with industry and stakeholders in the Grampians Region. Key steps in the development of the Destination Plan and Investment Roadmap have been:

- A **review** of existing documents and research relating to tourism outcomes and existing strategic work in the Grampians Region.
- A **product audit** analysing over 1,000 tourism related products in the Grampians Region relative to the interests of the target *Lifestyle Leader* market.
- **Situation review** through a web-based questionnaire distributed to tourism industry members and regional workshops held in Beaufort, Ararat, Halls Gap, Hamilton and Wartook.
- **Market research** (4 focus groups) held in Melbourne (by iSPY Brand Research & Strategy) with target visitors to the Grampians Region which explored perceptions of the region and gaps in the tourism offering.
- **Gap analysis** across tourism product and experiences to identify opportunity areas.
- Collection of **input from local governments** in the Grampians Region and Grampians Tourism as to existing and known opportunities and projects.
- **Filtering of potential opportunity areas** in terms of the anticipated outcomes from the opportunities and options on the table.

The resulting opportunities presented in the *Grampians Destination Plan & Investment Roadmap* are considered the optimal developments for the region to address deficiencies in the region's tourism offering, create growth in the region's target markets, develop benefits across the Grampians Region and result in outcomes on the ground.





## 2. The Grampians Region

The Grampians Region is a prominent mountainous area located approximately three hours drive northwest of Melbourne. The Grampians Region includes the five Local Government Areas (LGA's) of:

- Rural City of Ararat.
- Rural City of Horsham.
- Northern Grampians Shire.
- Southern Grampians Shire.
- Pyrenees Shire.

**Figure 2.1: Grampians Tourism Region**



Source: Google Earth

The Grampians Region has developed a significant destination profile through its values for nature-based and outdoors adventure activities. Surrounding the Grampians National Park are extensive agricultural areas and their service towns. Tourist visitation to these areas is predominantly driven through food, wine and heritage-related product.

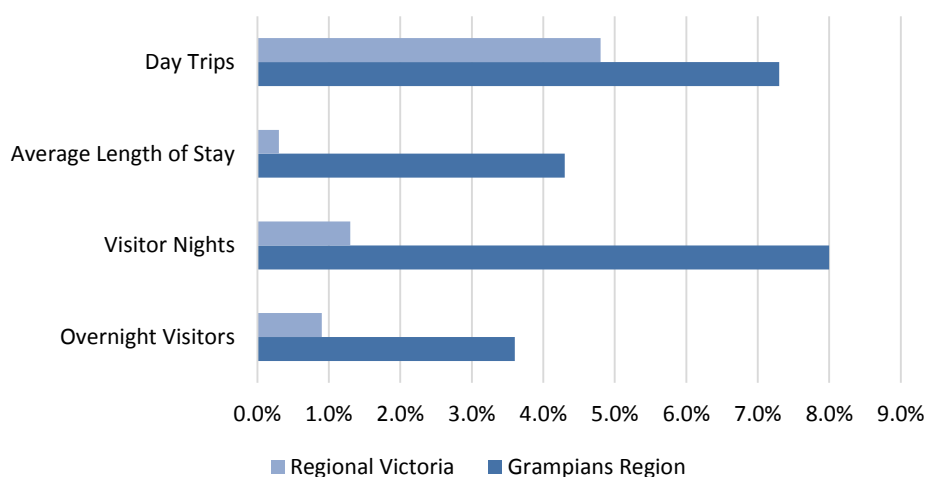
In 2012 the Grampians Region attracted approximately 1.6 million visitors<sup>1</sup>. Tourism in the Grampians Region was estimated to contribute \$946 million in Gross Regional Product or 22.2% of the local economy<sup>2</sup>. Tourism is critical to the economy of the region.

### 2.1 Visitors to the Grampians Region

The Grampians Region's domestic visitation is characterised by a high proportion of interstate visitation (25%), with moderately lower proportions of international (9%), and intrastate (66%) visitors compared to Regional Victoria as a whole. Since 2008 Grampians domestic visitation has increased at above Regional Victorian benchmarks.

<sup>1</sup> Grampians Tourism (2013) *Travel to the Grampians Year Ended March 2013*. Grampians Tourism, Halls Gap.

<sup>2</sup> Deloitte Access Economics (2013) *Victorian Regional Tourism Satellite Accounts 2011-12*, Tourism Victoria.

**Figure 2.2: Visitation Benchmarks (growth 2008-13)**

Source: Tourism Research Australia (2013) *National Visitor Survey*, Tourism Australia, Sydney, Tourism Research Australia (2013) *International Visitor Survey*, Tourism Australia, Sydney.

The Grampians Region receives the majority of its visitation in spring (29%) driven by strong visitation to the Grampians National Park. However, overall visitation to the Grampians Region is considerably less seasonal than for Regional Victoria as a whole.

## 2.2 Tourism Activities

The Grampians Region receives a significantly lower proportion of Holiday or Leisure visitors, offset by a high proportion of Business visitation compared to the Regional Victorian benchmarks. Business trips are a key driver of visitation within the Grampians Region, particularly in the towns further away from Grampians National Park.

Consistent with the natural assets of the Grampians Region, relatively high proportions of visitors indulge in nature-based activities including: *Bushwalking or rainforest walks*, *Visit national or state parks*.

However, the Grampians Region receives below benchmark levels of flow-on spending activities such as: *Eat out at restaurants*, *Pubs clubs discos etc.*, *Go shopping (pleasure)*.

**Table 2.1: Activities Undertaken (Domestic Overnight Visitors)**

Activity	Grampians	Regional Victoria
Eat out at restaurants	43%	50%
Visit friends and relatives	39%	45%
General sight seeing	26%	28%
Bushwalking or rainforest walks	23%	14%
Visit national parks or state parks	19%	11%
Pubs clubs discos etc.	15%	19%
Go shopping (pleasure)	11%	20%
Picnics or BBQs	8%	9%
Other outdoor activities (a)	6%	4%
Go on a daytrip to another place	5%	6%

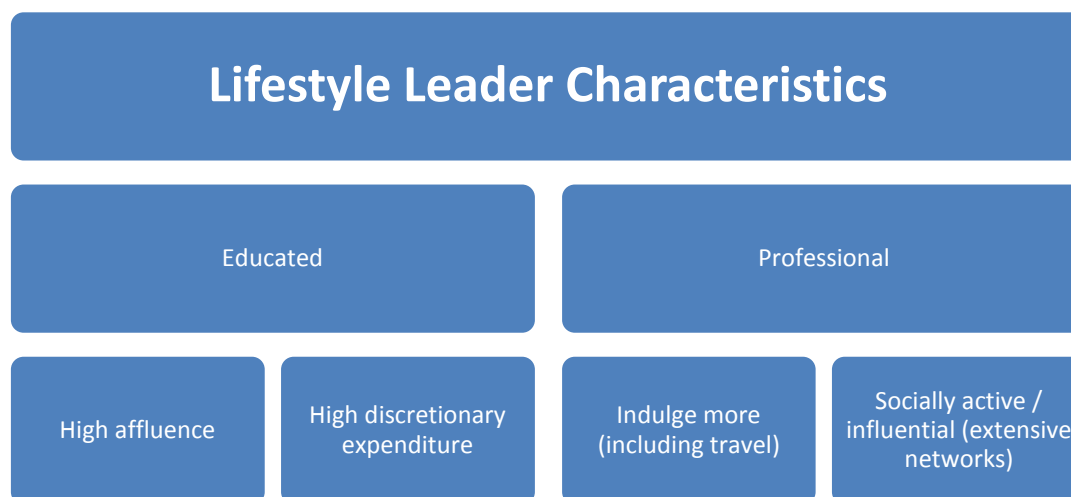
Note: (a) e.g. horse riding, climbing, bungee jumping, four wheel driving.

Source: Tourism Victoria (2012) *Grampians Market Profile Year Ending December 2012*. Tourism Victoria, Melbourne.

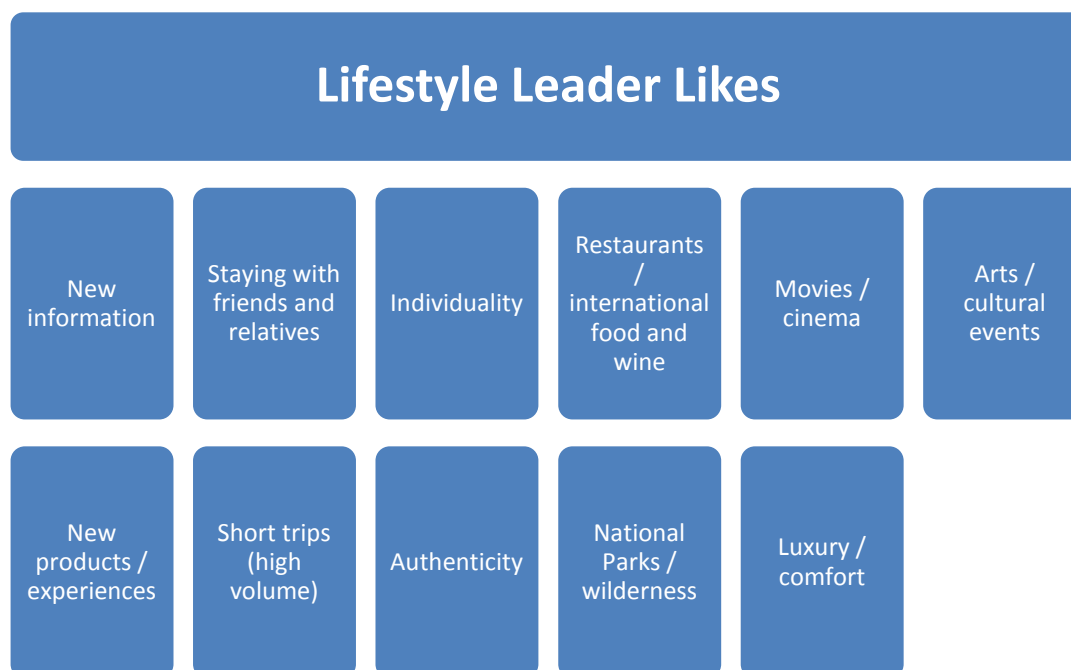
## 2.3 Target Markets

The Grampians Region is focussed on attracting and developing tourists that fit within Tourism Victoria's *Lifestyle Leader* psychographic. This is a market segment unified by a style of thinking and approach to life, rather than by preferred activities, demographics, socio-economics or geographic source. It is estimated that 28.6% of Australia's 18+ population fits within the *Lifestyle Leader* psychographic.

None-the-less, when studied *Lifestyle Leaders* do tend to display certain characteristics in terms of incomes and socio-economic status, even if these features do not define them. These are:



As tourists *Lifestyle Leader's* **dislike** poor quality accommodation, historical attractions and passive products. They typically **like** and seek out:



Geographically, the core market for the Grampians Region is Victoria, and to a lesser extent South Australia. Other interstate and international markets are relatively limited at this point, but are a focus for growth into the future.

## 2.4 Product & Experiences Categories

Development of the *Grampians Tourism Destination Plan & Investment Roadmap* has focused on investigating products and experiences which are relevant to the target markets and the strengths and assets available within the Grampians Region. These have been grouped into tourism pillars as follows (more explanation of these pillars is contained in **Appendix A**):



## 3. Gaps in Tourism Outcomes

### 3.1 Qualitative Market Research

Qualitative market research was conducted in Melbourne by iSPY Brand Research & Strategy in late 2013 which identified current consumer perceptions of the Grampians Region including strengths, weaknesses, barriers to visitations and gaps. Nine key lessons were uncovered from this research:

The Grampians Region is mainly associated with the Mountain Range and Halls Gap	<ul style="list-style-type: none"> <li>This single point of focus creates perceptions of the region as relatively poorly developed for tourism (compared to competitive set). It's also an attractive nature based destination albeit a little too one dimensional.</li> </ul>
Competitive Set	<ul style="list-style-type: none"> <li>Rural/ regional /nature based holidays are destinations within 90 minutes' drive of Melbourne perceived to have a well-rounded offer appealing to the whole family (Mornington and Bellarine Peninsulas/ Dandenongs) and/or places offering something distinctive, unique or a special experience further afield (The High Country snowfields, Echuca /Water sports; The Otways (Treetop Adventures /Fly).</li> </ul>
Key Motivations	<ul style="list-style-type: none"> <li>Rural/regional and nature based holidays are broadly segmented by consumers according to key motivations. "Food and Wine/Indulgence", "Pampering/Treat", "Village/Historic", "Beachy/Carefree", "Walking/ Hiking/Active Nature", "Special Interest/activity". These segments are not mutually exclusive and it is the destinations that manage to deliver all types of experiences that incite repeat visitation.</li> </ul>
Consumer Value Drivers	<ul style="list-style-type: none"> <li>Type and choice of accommodation, prevalence and range of food and wine offers, convenient amenities, availability and pride in regional produce, evidence of civic pride/care and maintenance, a choice of activities and a unique experience or attraction are all important markers of destination desirability.</li> </ul>
Grampians Perceptions	<ul style="list-style-type: none"> <li>The Grampians region is pigeon-holed as purely a 'walking /hiking active nature' holiday. Prevalent perceptions: Mountainous terrain, scenic, Halls Gap, Dunkeld, the national park, walking/hiking, camping, nature, trees, wildlife, kangaroos and 'real Australia'. People are largely unaware of the broader regional offer and its relative merits.</li> </ul>
Different life stages, different needs	<ul style="list-style-type: none"> <li>Different life stages have varying pragmatic needs when it comes to destination choice. Families with young kids seek places that afford them 'free activities', 'safety/security' especially convenient access to shops, pharmacies and even medical attention. Families with older kids need places their kids will find appealing with a more adventurous bent. Couples are more demanding re: the array and availability of food and wine, local produce and choice of four/five star accommodation.</li> </ul>
Food & Wine	<ul style="list-style-type: none"> <li>Has become an integral part of a consumers' regional/rural holiday expectation and a proxy for sophistication/quality. Whether or not consumers choose to partake is less important than the regions' reputation for wineries, restaurants, cafes, local markets, events and festivals. In some ways Food and Wine becomes a 'marker' for destination sophistication/quality and shifts it up the desirability spectrum.</li> </ul>
Key Barriers	<ul style="list-style-type: none"> <li>Given all of the above the Grampians region's biggest barriers are the perceived one-dimensional offer "we don't know what there is to do there apart from walking" coupled with "a lack of sophistication around ancillary amenities and experiences". This includes: perceived distance from Melbourne; relatively 'basic' standard of accommodation (lack of 5 star facilities), relatively poor amenities/conveniences, limited food and wine choices and a sheer lack of understanding about the breadth and depth of the regions' offering.</li> </ul>
Gaps & Opportunities	<ul style="list-style-type: none"> <li>In terms of real tourism gaps, there is a direct need to improve the basics; knowledge of availability, convenience and proximity of basic amenities; the array of accommodation alternatives particularly those offering four or five star standard. In the longer term there is a need to both develop the food and wine product of the region and further develop the indoor and outdoor experiences including iconic attractions/ experiences unique to the area.</li> </ul>

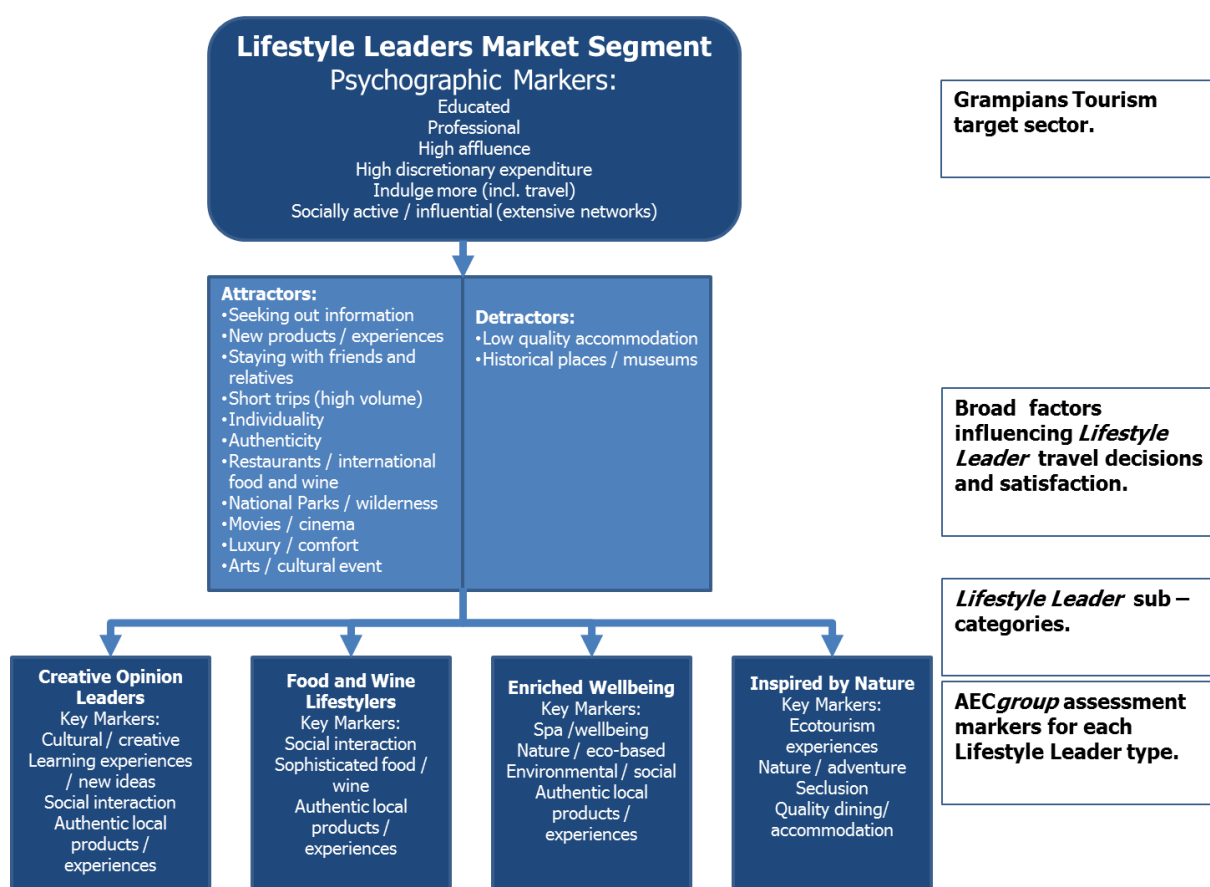
## 3.2 Experiences Audit

A comprehensive audit of tourism products and experiences throughout the Grampians region was undertaken in order to appropriately profile available tourism products and related experiences relative to Tourism Victoria's *Lifestyle Leaders* psychographic market segmentation. Products were assessed against the psychographic target markets as they transcend activity segments, geographic and demographic markets.

Research by Tourism Victoria into the *Lifestyle Leader* psychographic has revealed four key sub-types of *Lifestyle Leader* of relevance to the Grampians tourism market:



Characteristics of Tourism Victoria's *Lifestyle Leaders* psychographic market and the four key sub-types are:



Based on the product and experiences audit relative to the *Lifestyle Leaders* psychographic, outcomes for the five local government areas and the Grampians National Park are summarised below.

### 3.2.1 Southern Grampians Shire

In terms of alignment with experiences sort by *Lifestyle Leaders*, available tourism product in the Southern Grampians region primarily interests nature-oriented tourists with both 'soft' nature engagement (*Enriched Wellbeing*) and more in-depth nature engagement (*Inspired by Nature*) options. There is a recognition in the Southern Grampians that its tourism is heavily oriented towards the Grampians National Park but also to some attractions beyond its southern boundaries such as the Southern Ocean and Mt Eccles area.

Southern Grampians has a number of products with good alignment to *Food & Wine Lifestylers*, however local food & wine culture does not generally extend strongly into other products (such as restaurants, though exceptions exist). Hamilton itself has a strong focus on business, VFR and service-related (schooling, health) visitation and has not developed a strong suite of tourism-focussed products.

### 3.2.2 Northern Grampians Shire

Northern Grampians Shire has developed an events base with reasonable alignment with experiences sort by *Lifestyle Leaders*. These events tend to food and wine and creative / local culture rather than the nature-based experiences. This tendency also is reflected in the arts and culture product of the region.

Tours in the region are heavily focused on the Grampians National Park region and have a good alignment with experiences sort by *Lifestyle Leaders* across the four types of this psychographic considered. However accommodation and dining in the region has poor alignment with experiences sort by *Lifestyle Leaders*, other than for some specialised winery and farmgate related products. Halls Gap fails to demonstrate a regional culture through its dining or retail offerings. Accommodation and dining that is of a quality to complement other experiences in the region is a key gap. Also, events in Northern Grampians Shire have minimal focus in terms of aligning specifically with the *Inspired by Nature* sub-type.

### 3.2.3 Rural City of Ararat

Ararat has considerable natural assets that align with the experiences sought by nature – orientated *Lifestyle Leaders* (both in 'soft' and more in-depth nature engagement), however minimal product in other categories to specifically interest this market. Product aligning with the interests of *Food & Wine Lifestylers* exists in the region (wineries), however, as across much of the Grampians Region there is minimal extension of local food and wine to other product categories.

Ararat has some developed arts and heritage products, however current events display minimal features that align with the interests of the *Lifestyle Leader* psychographic. Ararat has a strong dependence on VFR and business related tourists, and sees its leisure tourism position relating to wine (along with the Pyrenees), nature-based (with the relationship to Grampians National Park) as well as some local heritage and cultural features.

### 3.2.4 Rural City of Horsham

Horsham is a primarily a rural area with minimal nature-based product within its local government boundaries. Horsham acts as a significant regional centre and has relatively well developed events and arts and culture products with local, genuinely rural characteristics that appeal to some *Lifestyle Leaders*.

Horsham has a small, but diversified wine and farmgate sector, with minimal reflection in the broader dining and accommodation sector. Whilst nature-based product is minimal within the local government area itself, the eastern part of the area is still significantly intertwined with the Grampians National Park and Halls Gap products in terms of tourist attraction.

### 3.2.5 Pyrenees Shire

Pyrenees Shire has the largest and most developed wine sector in the Grampians Region although the food and farmgate product is minimal. Compared to the rest of the Grampians Region, the Pyrenees Shire has a greater representation of accommodation product with



appeal to the *Inspired by Nature* and *Food & Wine Lifestylers* types, although overall accommodation is still not highly aligned with experiences sort by *Lifestyle Leaders*.

Otherwise, product in the region is not strongly aligned with the experience indicators of the *Lifestyle Leaders* psychographic. Local feedback is that the region looks equally to Ballarat and Grampians in terms of its regional tourism positioning. The previously dominant winery-related tourism product has also declined in recent years with the explosion of wineries closer to Melbourne.

### 3.2.6 Grampians National Park

Grampians National Park, unsurprisingly, has a strong alignment of product with the *Inspired by Nature* type. There is also a good alignment of products to 'softer' nature-based experiences which align well with the *Enriched Wellbeing* type, such as easily visited waterfalls and natural features.

Indigenous product in the Grampians National Park aligns most closely with the experience indicators of the *Creative Opinion Leaders*, which is not otherwise a strong market for the Grampians Region (although some alignment exists about locally themed events and arts).

## 3.3 Summary of Key Challenges

Summarising from the outcomes of the market research and experiences audit, key challenges for the Grampians Region are:

Addressing deficiencies relative to changing consumer expectations for the Grampians Tourism Region (e.g. presentation of towns and villages and accommodation standards).

Enhancing the key product strength of the region (e.g. nature and the mountains) to improve iconic / hero status with target markets.

Filling investment gaps around additional product opportunities relative to the strengths and character of the region (e.g. farm & wine, water and rural culture).

Improving interaction between Halls Gap and the rest of the Grampians Tourism Region in a way that enhances dispersal and the overall tourism offering.

Improving the communication of the region's tourism offering to its target market.

These challenges have all been targeted through the opportunities presented in the *Investment Roadmap*.



## 4. Investment Roadmap

The *Investment Roadmap* identifies projects and priorities that grow the tourism potential of the Grampians Region as a whole.

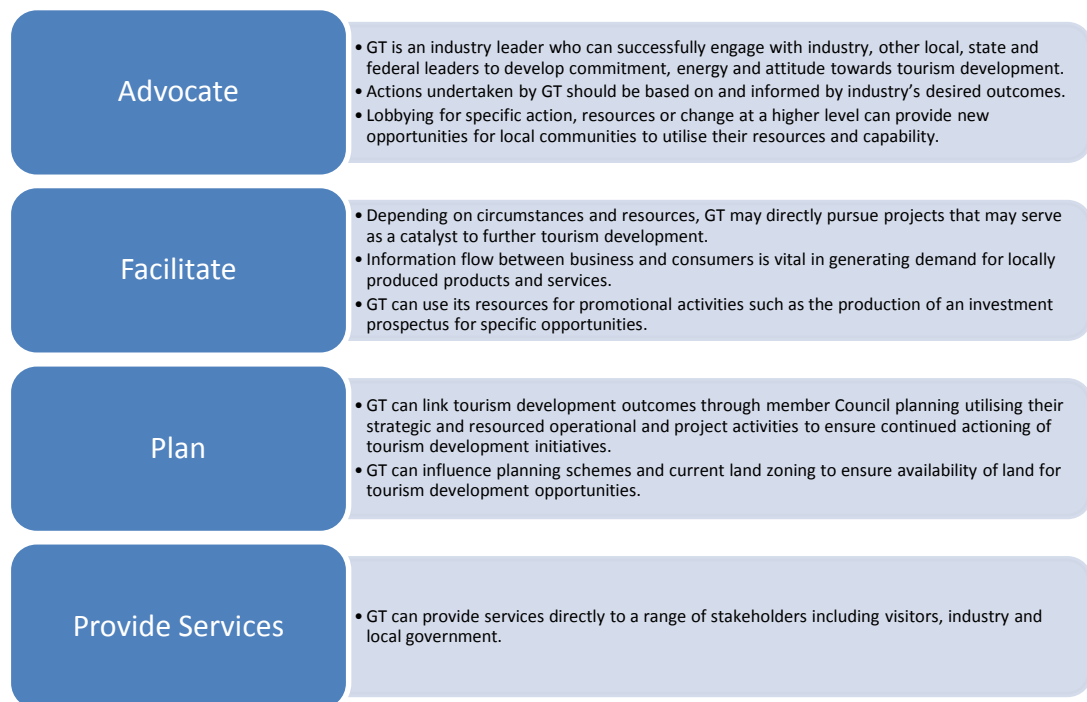
Projects vary from advanced plans that have been studied and started, initial stages of investment to new concepts and regional approaches. In support of the *Investment Roadmap*, implementation and business cases will be developed for key opportunities.

The *Investment Roadmap* provides a clear outline of the opportunities and investment priorities of the Grampians Region for both public and private sector interests.

### 4.1 Grampians Tourism's Role

All of the investment priorities presented in the *Investment Roadmap* involve significant challenges to deliver. The role of Grampians Tourism is to provide voice for these important initiatives, enabling greater challenges to be addressed than possible by private industry or individual stakeholders.

The role that Grampians Tourism can play in progressing the *Investment Roadmap* are as follows:



### 4.2 Regional Priority Opportunities

*Regional Priority Opportunities* are those that have the potential to create significant positive tourism impacts that extend across the Grampians Region into the longer term. The key outcome required is the potential to create widespread regional outcomes for tourism in the Grampians Region.

A summary of the *Regional Priority Opportunities* for the Grampians Region are contained in **Table 4.1** followed by more detailed descriptions.

**Table 4.1: Summary of Regional Priority Opportunities**

Project	Description	Status	Investment	GRT Priority/Role
<b>Grampians Peak Trail</b> (Attraction, Activity)	144km multi-day iconic walk through Grampians National Park with supporting infrastructure in surrounding regions.	<ul style="list-style-type: none"> <li>Master Plan developed.</li> <li>Initial stages of infrastructure development underway.</li> <li>Further funding required to complete.</li> </ul>	<ul style="list-style-type: none"> <li>\$27 million estimate for public infrastructure development</li> <li>Complementary private sector investments in accommodation and support services</li> </ul>	<ul style="list-style-type: none"> <li>High priority</li> <li>Advocate, facilitate, plan, provide services</li> </ul>
<b>Grampians Region Digital Project</b> (Awareness)	Digital tools to co-ordinate, promote and inform the visitor experience across the entire Grampians Region.	<ul style="list-style-type: none"> <li>Initial digital strategy project underway.</li> <li>Ongoing investment required.</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing budget for development, maintenance and update of digital tools minimum \$20,000 to \$30,000 per annum</li> </ul>	<ul style="list-style-type: none"> <li>High priority</li> <li>Plan, provide services</li> </ul>
<b>Outdoor Adventure Recreation Destination</b> (Attraction, Activity)	Strategy to identify, develop and promote natural and man-made adventure opportunities (including infrastructure) across the entire Grampians Region.	<ul style="list-style-type: none"> <li>Detailed audit and consultation requires funding and delivery.</li> <li>Ongoing investment through regional land and asset managers required.</li> </ul>	<ul style="list-style-type: none"> <li>Strategy investment in the vicinity of \$100,000 to \$200,000</li> <li>Ongoing investment in public outdoor adventure infrastructure could be substantial when combined across the regions (\$millions per year).</li> </ul>	<ul style="list-style-type: none"> <li>Medium priority</li> <li>Facilitate, plan</li> </ul>
<b>Grampians Region Foundation Village Project</b> (Amenity)	Revitalisation planning actions for Halls Gap and Dunkeld to incorporate elements aimed at satisfying key visitor markets.	<ul style="list-style-type: none"> <li>Scoping work underway for Halls Gap.</li> <li>Structure Plan in place for Dunkeld.</li> <li>Significant investment for redevelopment incentives and public spaces works required.</li> </ul>	<ul style="list-style-type: none"> <li>Master Plan development for Halls Gap ~\$200,000</li> <li>Incentives and redevelopment budget impossible to estimate, between the two villages likely to be in the \$10s of millions.</li> </ul>	<ul style="list-style-type: none"> <li>Medium priority</li> <li>Advocate, plan</li> </ul>
<b>Grampians Ring Road</b> (Access)	Route proximate to the Grampians National Park passing through most LGAs	<ul style="list-style-type: none"> <li>Feasibility and planning in place with Stage 1 funded.</li> </ul>	<ul style="list-style-type: none"> <li>\$6.3 million, with additional investments possibly viable in the future.</li> </ul>	<ul style="list-style-type: none"> <li>High priority</li> <li>Advocate</li> </ul>
<b>Indigenous Interactive Education Product</b> (Attraction, Activity)	Develop and the region's extensive Indigenous heritage targeted at international and educational markets. Includes Halls Gap (Brambuk), Budj Bim and Maggolee (Horsham).	<ul style="list-style-type: none"> <li>Concept, though work to engage local Indigenous communities about tourism opportunities has been ongoing.</li> </ul>	<ul style="list-style-type: none"> <li>Investment requirements may be minimal depending on opportunity</li> <li>Operational seed funding and support will be required in most cases</li> </ul>	<ul style="list-style-type: none"> <li>Medium priority</li> <li>Advocate, plan</li> </ul>

Source: AEC

#### 4.2.1 Grampians Peaks Trail

The Grampians Peak Trail (GPT) is an established proposal involving a 144 km, multi-day icon walk from Mt Zero to Dunkeld via the ranges of the Grampians National Park.

The through-walk is the central component of the project however the project also encapsulates various access points (to enable sections of the walk to be undertaken. The project includes a multi-faceted range of investments, including the trail itself, a range of direct investments and services to support the walk and associated investment opportunities in the surrounding region to support increased visitation generated by the GPT.

Opportunities relatively to the GPT include private accommodation development at either end of the walk and on the trail itself (such as exists on the Tasmanian Overland Track), private guiding and tour opportunities and a variety of support services for walkers choosing to do the trail (transport, meal delivery, portage, etc.).

These opportunities will to some degree be met through additional services provided by existing tourism operators in the region. Existing operators need to be kept informed of developments and service opportunities to plan for providing additional services. There will also be scope for new service providers to the region, particularly those which have expertise not currently in the region (e.g. provision of multi-day guided walks).

The total cost to construct the GPT base infrastructure (including trail and hiker camps) is estimated in the draft *Grampians Peak Trail Master Plan* as in the vicinity of \$27 million, comprised of:

- Upgrade of Existing Track: \$4.8 million.
- Construction of New Track: \$14.3 million.
- New Boardwalks / Bridges: \$2.5 million.
- Construction of Hiker Camps: \$5.0 million.

There is considerable scope for associated private sector investment in support infrastructure (lodges, etc.) and services.

##### **Key Objectives**

- The GPT would serve as a central 'hero' experience for the Grampians Region that builds on the key existing product strength (the mountains and bushwalking) of the region and lifts it to a national/ international level experience.
- Marketable product on a national and international scale.
- Asset that can be used to draw in and then disperse visitors.
- A trigger for new business opportunities in guiding, transport & food that services the trail.
- The 'hero' status of the GPT would also lift the credibility and desirability of a range of existing shorter walks and nature-based experiences in the Grampians region.
- Maximise associated direct investment opportunities such as accommodation, guiding and support services.
- Develop the GPT to fill a range of product and service niches not currently met within the Grampians Region.

##### **Anticipated Benefits**

According to the draft Grampians Peaks Trail Master Plan (2013), *"the walk is expected to generate 32,000 visitor nights in 2015, increasing to over 80,000 visitor nights by 2025 when all segments of the trail are operational. The total number of walkers using the GPT is expected to increase from 13,800 people in 2015 to over 34,000 people by 2025."*

For comparison walker numbers for existing iconic walks include 7,396 walkers in 2012/13 on Tasmania's Overland Track, 8,458 visitors on New Zealand's Milford Track (2006/07) and just over 10,000 walkers per annum on New Zealand's Routeburn Track.

Numbers on Victoria's Great Ocean Walk are more difficult to track due to the numerous entry and exit points, but are estimated to be over 10,000 per annum.

All of these iconic walks generate significant flow on benefits beyond the actual walker numbers. They provide significant credibility to the wilderness experience available at the destinations, even if most visitors do not undertake the walk. The large number of forecast walkers on the Grampians Peaks Trail indicates potential for significant flow on benefits to the region's tourism industry, villages and service providers.

### **Target Markets**

- Tourism Victoria's *Lifestyle Leader* psychographic (particularly *Inspired by Nature* and *Enriched Wellbeing*) / Tourism Australia's *Experience Seeker*.
- Demographically, the GPT will best suit singles, couples and families with older children (teenagers).

### **Next Stages**

The feasibility of a long distance trail in the Grampians National Park was first investigated by Parks Victoria in 2009. The draft *Grampians Peak Trail Master Plan* was released in 2013. The master plan is the basis for ongoing development of the GPT.

Development of stages of the GPT trail is already underway with support from the Parks Victoria, Regional Development Victoria and the Victorian Government.

Further stages will be progressively developed as funding is secured. The GPT is a State priority iconic walk for development.

#### 4.2.2 Grampians Region Digital Project

Develop a central digital tool to coordinate, promote and inform the visitor experience when visiting the Grampians Region. Potential inclusions within the digital project are extensive, and techniques and technologies are rapidly evolving. Basic features would involve a central database which is adaptable to all screen sizes with content regarding accommodation, attractions and services along with key maps and what's on sections. More ambitious features could revolve about real-time feedback, interactive mapping with activity preferences, locational and time data coordinating to produce a real-time, interactive guide to opportunities (e.g. events, specials), as well as interpretive supplements to attractions and features being visited. The development of the digital project should leverage capabilities and generic digital tools being developed by Tourism Victoria.

##### **Key Objectives**

- Provide a centralised tool to improve the ability of visitors to access and enjoy the region.
- Provide a regional impetus for more individual businesses to develop current digital presences.
- Encourage dispersal through information dispersal.

##### **Anticipated Benefits**

Digital approaches to information provision, promotion, measurement and feedback a genuinely transformative technologies that are evolving at break-neck speeds. The uptake of new digital approaches by market leaders is rapidly followed by these approaches becoming ubiquitous in the market. For the Grampians Region, the first benefit from pursuing the Digital Project is to ensure it does not lag behind market expectations for digital content and tools. As this is such a rapidly moving field, ongoing resources will be required to maintain content and tools that are current.

There is nothing to say that the Grampians Region cannot develop innovative and market-leading digital outcomes in relation to its tourism industry. The impact of the digital presentation of the Grampians Region could be great enough to encourage more visitors than to other regions. Success in being a leading digital tourism region will require greater upfront resources, continuous attention and reinvestment and a fast-moving and risk-tolerant approach. Importantly, the Grampians Region's key target market (Tourism Victoria's *Lifestyle Leaders* psychographic) are particularly attuned to picking up new trends and would be well targeted through a cutting edge, risk-taking digital approach that was authentic to the destination.

##### **Target Markets**

- Tourism Victoria's *Lifestyle Leaders* psychographic are classic early adopters of new technologies, and can anticipated to be key users of digital tools developed for the region.
- The use of digital tools is rapidly spreading to all demographics. Increasingly, a sophisticated layer of digital support is becoming an essential component to tourism development in any region.

##### **Next Stages**

Grampians Tourism has initiated a Digital Strategy Project with consultants in 2014.

The digital field is rapidly evolving. Ongoing resources need to be committed by the Grampians Region to both remaining current in existing digital initiatives and moving into new digital opportunity areas as they arise.

### 4.2.3 Outdoor Adventure Recreation Destination

The Grampians Region aims to be a world class adventure tourism destination. The region is an existing magnet for outdoor adventure activities including bushwalking, camping, rock climbing, mountain biking, trail running, swimming, fishing, paddling, hunting, trail bike riding and horse riding. In particular the northern section of the Grampians National Park is an existing key destination for the outdoor education industry, school and group based programs and individuals offering camping, bushwalking, rock climbing and cycling. It is also an internationally renowned climbing and bouldering area.

Development of infrastructure and access to support these activities is an ongoing need for the Grampians to maintain and develop its status as Victoria's premier outdoor adventure destination. The Grampians Region as a whole should focus on development and promotion of select 'hero' or 'headline' courses, tracks or locations developed to national/international standard ahead of the broader selection of facilities around the region.

In addition to the outdoor adventure opportunities linked to the natural environment, 'manufactured' adventure developments have potential and do not necessarily need to dilute the impact of the natural areas based activities. Developments such as bungee jumping, indoor rock climbing, cable-ski parks, 4x4 parks, hot air ballooning, skydiving, tree-surfing parks and fishing farms have potential. These should be located outside of key tourist village areas (e.g. Halls Gap) with the Pomonal / Lake Fyans / Fyans Creek area logically situated for clustering these activities. However individual opportunities may be suited to many locations throughout the region, particularly where unique landforms or assets create a conducive environment to particular recreation types. Wartook, Dunkeld, Cavendish, Beaufort area and many other areas could suit particular adventure tourism developments.

Greater presence of outdoor adventure guides, tours and equipment sales / hire companies are also suited to expanding the availability of outdoor adventure experiences for different visitor types. Opportunities will continue to develop in support of the Grampians Peak Trail and other developments. A not-for-profit outdoor adventure guiding cooperative could be pursued to increase the supply of guides in the region and bring student guides for training to the region.

#### **Key Objectives**

- Support and strengthen key product strength of the Grampians Region.
- Improve infrastructure and access to support events and private operators accessing and utilising the National Parks and outdoor areas.
- Improve access to lakes with paddling and swimming areas.
- Further support and facilitate the school group market and build stronger connections to the region.
- Focus on improved visitor experiences and offers in the Grampians Region both on and off park through the creation of an activity destinations / hubs.

#### **Anticipated Benefits**

Outdoor adventure (both 'soft' and 'hard') is a key driver of visitation to the Grampians Region. The region's traditional visitor market has grown around activities such as bushwalking, boating and swimming. In recent times activities such as rock climbing and mountain biking have grown in prominence.

As with all tourism experiences, expectations by visitors as the quality and availability of outdoor adventure experiences is constantly increasing. The Grampians must improve its infrastructure simply to remain current with many existing markets, let alone develop new markets about growing outdoor adventure activities.

In the Year Ending June 2013, 3.12 million domestic overnight visitors and 0.66 million international overnight visitors to Victoria participated in adventure tourism<sup>3</sup>, making it a substantial market in its own right. Participants in adventure tourism tend towards the

<sup>3</sup> Tourism Victoria (2013) *Adventure Tourism Market Profile Year Ending June 2013*, Tourism Victoria

sensation seeking psychographics (e.g. Tourism Victoria's *Lifestyle Leaders*), with their positive characteristics of influence over tourism trends, higher than average visitation rates and higher than average incomes. A strong profile as an adventure tourism destination can also create a market perception that a destination is interesting and worthwhile visiting for visitors that do not intend to engage in adventure tourism activities.

### **Target Markets**

- Outdoor adventure infrastructure users will be derived primarily from Tourism Victoria's *Lifestyle Leaders* psychographic / Tourism Australia's *Experience Seeker* psychographic.

### **Next Stages**

Outdoor adventure recreation is already a core focus of the Grampians Region with major existing initiatives such as the Grampians Peaks Trail working within this theme.

However, a coordinated initiative to drive development across this segment for the region is required. There are two key actions required to support this initiative:

- An extensive audit by outdoor adventure category (walking, mountain biking, camping, fishing, rock climbing, hunting, etc.) of available and known potential infrastructure in the region. This is a major exercise and will likely identify many hundreds of infrastructure items.
- Consultation with outdoor adventure enthusiast groups (ideally with some knowledge of the region) as to the status of existing, potential and unidentified further infrastructure and support requirements. Needs and desires are likely to vary significantly by the different groups.

Development of identified priority infrastructure should be considered for incorporation into existing forward plans by regional property and asset managers (local governments, Parks Victoria, etc.). Additional budget attraction will be required for major investment items.

#### 4.2.4 Grampians Region Foundation Villages Project

Halls Gap and Dunkeld are currently the most tourism developed and recognisable villages in the Grampians Region. Dunkeld would benefit from increasing its critical mass of tourism products and services and has already developed detailed plans. A major revitalisation project is required for Halls Gap where the village is seen by the market as not meeting the standards of the surrounding natural environment. Objectives include providing the retail mix sought by visitors in a compact retail precinct and providing sufficient operators in key tourism services. A critical mass of operators in key villages, provided it is sustainable, leads to stronger competition amongst businesses, with better service and product standards resulting.

The types of mechanisms required for both villages include:

- Streetscape and public areas redevelopment.
- Town planning mechanisms (such as simplification of some processes or progressing planning hurdles on critical sites prior to market interest). For example a higher density development footprint linked to public space outcomes could be pre-approved on strategic sites prior to marketing to improve prospects of take-up and development.
- Land supply and aggregation actions (e.g. purchasing of private sites for redevelopment).
- Investment attraction of new developers (ideally complemented by incentives packages) with a focus on accommodation and retail.
- Attraction of new retailers and restaurant operators through measures such as relocation subsidies, in-kind promotional support or matched infrastructure investments.
- Investment attraction of new service providers, including those potentially linked to service opportunities on the Grampians Peak Trail.
- Development of better linkages to greater regional attractions, producers and businesses, through linked shopfronts, business relationships and presences at events and markets. For example interest has been expressed in a shopfront for Grampians region wines in Halls Gap.
- Redevelopment incentives (e.g. infrastructure charges relief for significant refurbishments of existing establishments).
- Comprehensive events and activities programs to improve vibrancy for visitors.

As well as working to modernise, revitalise and improve competitive standards, the revitalisation strategy should develop design approaches to accentuate its unique characteristics.

##### **Key Objectives**

- Revitalise the presentation of Halls Gap which is currently considered tired and outdated by many visitors.
- Introduce new product into Halls Gap that meets the retail mix sought by visitors and locals.
- Provide incentive (direct and through enhanced completion) for reinvestment and update of existing accommodation, retail and dining product.
- Improve the presence of businesses from the Greater Grampians Region in Halls Gap, e.g. develop Halls Gap presences from successful regional restaurants and retailers.
- Develop the increasing potential of Dunkeld as a key tourism hub to drive visitation to the Grampians Region.

##### **Anticipated Benefits**

The tired status of tourism villages in the Grampians Region (particularly Halls Gap) has been identified through market research as a major detractor for visitor experiences.



Public space redevelopment and investment incentive packages have been utilised successfully across Australia and globally to reinvigorate towns and cities. Benefits are principally through increased visitation and increased private sector investment and reinvestment in tourism product. Public sector led revitalisation works where the inherent characteristics of the region are let down by the quality of the built environment such as Halls Gap.

### **Target Markets**

- Villages are the hubs of tourism activity for most visitors to the Grampians Region. Presentation and vitality of villages is particularly important to markets with high expectations, which will tend towards higher value markets and those travelling greater distances (interstate and international).

### **Next Stages**

A Structure Plan has been recently developed for Dunkeld. A strategy to action the design initiatives in this plan is required. Further support for the village's development would likely be through public infrastructure development, investment attraction activities and development incentives.

Initial scoping for the development of a revitalisation plan for Halls Gap is underway, however, significant funds are required to develop a comprehensive plan. A comprehensive plan for revitalisation along with adequate ongoing funding to support development incentives and public infrastructure development is required to lift Halls Gap to a world class tourist village status.

#### 4.2.5 Grampians Way Ring Road

The Grampians Way Ring Road project is a proposal to seal existing dirt roads and develop supporting infrastructure in and around the Grampians National Park to support self-driving touring routes. A *Grampians Way Ring Road Scoping Study* was prepared in late 2012 which recommended four projects from 13 options examined.

The Grampians Way Ring Road would be a useful improvement to tourism potential in the Grampians National Park and surrounding villages. It would assist in developing themed touring routes in the region such as food & wine touring routes, wildflower touring routes and villages touring routes. The Ring Road would provide alternative access routes during natural disasters. It would also be an important supporting development to the Grampians Region Villages and Produce Regions Project.

##### Key Objectives

- Improve self-drive touring about the Grampians National Park and nearby surrounds.
- Improve visitor dispersal in the region.
- Improve prospects for individual private sector investments along the touring routes.
- Improve the resilience and flexibility of the region to respond to natural disasters.

##### Anticipated Benefits

Benefits from the Grampians Way Ring Road project will relate to increased ease and comfort of tourists to the region exploring the region by self-driving. Benefits are likely to be more strongly felt in the villages and attractions about the route.

The *Grampians Way Ring Road Scoping Study* highlighted several case studies of the benefits of road projects on tourism outcomes including:

- **Bogong High Plains Road:** The \$10 million costs of sealing the Bogong High Plains Road in Victoria have had a major impact on tourism to the region. In particular, off peak visitation is estimated to have increased by 88%, and 5% of visitors have added an extra night to their stay in the region.
- **South-face Road, Baw Baw:** \$500,000 was spent improving a 30km section of South Face Road at Mount Baw Baw. This has led to 28% increase in visitation during off peak season and a 26% increase during peak season. It is also estimated that the dispersal of visitors through the region has increased by 50%.

The situation and outcomes will be different for the Grampians Way Ring Road however it is clear that strategic road projects can generate significant benefits for regional tourism regions.

##### Target Markets

- The Grampians Way Ring Road will improve touring routes and options for all visitors and locals. Self-driving is the dominant mode of transport for all visitors (intrastate, interstate and international) to the Grampians Region. There is no specific psychographic or socio-economic market targeted.

##### Next Stages

The *Grampians Way Ring Road Scoping Study* recommended four projects involving road sealing and / or supporting infrastructure worth a combined \$6.3 million (in 2012). The project has received funding for Stage 1. Further funding is required to complete the current project, as well marginal options for further road improvements which are anticipated to become viable in the future.

#### 4.2.6 Indigenous Interactive Education Product

There is significant market interest in Indigenous product by certain tourists, particularly from international visitors. The Grampians Region has a strong Indigenous heritage and ongoing culture. A number of Indigenous rock art sites in the Grampians are both accessible and publicly promoted, a rare outcome anywhere in Australia. These are also the only rock art sites in south eastern Australia. Looking forward, demand is underserved for interactive Indigenous experiences, such as Indigenous guided tours to understand the land's features, dreaming and bush tucker. Initiatives to develop quality interactive Indigenous experiences around the Grampians Region should be encouraged and supported. Existing initiatives have been progressed to varying degrees by Brambuk, Budga Budga Cooperative and Budj Bim.

##### **Key Objectives**

- Build on the region's extensive Indigenous heritage.
- Meet demand for authentic interactive Indigenous experiences.
- Develop product with strong appeal to International Visitors.
- Develop quality educational product with unique qualities for the schools market.

##### **Anticipated Benefits**

Well delivered, interactive Indigenous product has strong market interest and would likely be a significant drawcard for tourists to the region, in particular international tourists. Despite the strong market interest in Indigenous tourism product, there is relatively few established products across Australia and even fewer that have developed a reputation for excellence. The Grampians Region is regarded as a leading destination for Indigenous history in Victoria, with over 80% of known Victorian aboriginal art sites in the region. Should it be able to build authentic, interactive Indigenous tourism product, it has the potential to draw a significant market share.

Indigenous tourism product is a natural complement to the Grampians nature-based and landscape related core products.

##### **Target Markets**

- International tourists.
- Tourism Victoria's *Lifestyle Leaders* psychographic / Tourism Australia's *Experience Seeker* psychographic.
- Education market.

##### **Next Stages**

Existing Indigenous tourism initiatives in the region have been supported to date by Tourism Victoria and other stakeholders. However, they are currently in planning, or do not deliver the types of experiences that the market is most interested in.

Developing authentic, interactive Indigenous experiences can only occur through the interest of Indigenous individuals and groups in being in the tourism industry. Progressing the development of Indigenous interactive education product in the Grampians Region needs to start with a program of engagement with local Indigenous communities about the tourism development directions and opportunities being pursued in the region.

## 4.3 Significant Opportunities

*Significant Opportunities* are those that have the potential to be significant generators of tourism visitation in their own right, and be a significant contribution to the critical mass of tourism product in the region, but are anticipated to be less extensive in their potential to develop regional synergies or outcomes across the Grampians Region.

A summary of the *Significant Opportunities* for the Grampians Region are contained in **Table 4.2** followed by more detailed descriptions.

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**Table 4.2: Summary of Regional Priority Opportunities**

Project	Description	Status	Investment	GRT Priority/Role
<b>Mt Arapiles Accommodation</b> (Accommodation)	Accommodation to support rock climbers at the world renowned Mount Arapiles-Tooan State Park.	<ul style="list-style-type: none"> <li>Mt. Arapiles Precinct Plan and Feasibility Study was developed in 2007. Further work required to for a development option that is acceptable to stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>Dependent of scale and construction difficulties, likely to be smaller scale accommodation (several million \$ capex).</li> </ul>	<ul style="list-style-type: none"> <li>High priority</li> <li>Facilitation, plan</li> </ul>
<b>Wildlife Art Museum of Australia</b> (Attraction, Activity)	A national centre for works of outstanding Australian wildlife and history artists in the Halls Gap East area.	<ul style="list-style-type: none"> <li>Site plans and operation concept prepared, full funding now required.</li> </ul>	<ul style="list-style-type: none"> <li>\$10 million</li> </ul>	<ul style="list-style-type: none"> <li>Medium priority</li> <li>Advocacy</li> </ul>
<b>Nature-based and Eco-Accommodation</b> (Accommodation)	Complimentary accommodation product throughout the region. Candidate locations include: Grampians National Park, Black Range National Park, Mt Arapiles National Park, Pyrenees State Forest, Mt Langi Ghiran & Mt Cole.	<ul style="list-style-type: none"> <li>Legislation from the Victorian Government has opened the potential to develop these sites.</li> <li>Further work required around specific site selection and preparation for market.</li> </ul>	<ul style="list-style-type: none"> <li>Minimum scale developments are likely to start at about \$1.5-\$2.0 million each.</li> </ul>	<ul style="list-style-type: none"> <li>High priority</li> <li>Facilitation, plan</li> </ul>
<b>Grampians Region Village and Produce Regions Project</b> (Amenity)	Activation of regional towns to attract visitors (Natimuk, Wartook-Laharum, Coleraine, Great Western, St Arnaud, Moonambel, Avoca, Beaufort, Henty Wine Region).	<ul style="list-style-type: none"> <li>Strategic planning varies from non-existent to in-progress depending on the village / produce region.</li> </ul>	<ul style="list-style-type: none"> <li>Strategic masterplanning and supporting local law / planning changes likely to cost \$300,000 to \$500,000 for all the villages and produce regions combined.</li> </ul>	<ul style="list-style-type: none"> <li>Medium priority</li> <li>Facilitation, plan, service provision</li> </ul>
<b>Pomonal / Lake Pyans / Halls Gap East Development Zone</b> (Amenity)	Development of a tourism 'spillover' investment zone in the Pomonal / Lake Pyans / Halls Gap East area.	<ul style="list-style-type: none"> <li>Triangle Rural Zone Review for the larger Ararat / Stawell / Halls Gap bounded triangle completed in 2012. Planning changes require completion and Masterplan for the area required.</li> </ul>	<ul style="list-style-type: none"> <li>Strategic masterplanning and supporting local law / planning changes likely to cost \$40,000 to \$80,000.</li> </ul>	<ul style="list-style-type: none"> <li>Low priority</li> <li>Advocacy, plan, service provision</li> </ul>
<b>Hamilton Arts &amp; Cultural Precinct</b> (Attraction, Activity, Amenity)	Arts and cultural precinct to attract visitors and assist in revitalisation in Hamilton.	<ul style="list-style-type: none"> <li>Brown Street Arts and Cultural Precinct Concept Plan was completed in 2011. The Hamilton Arts and Culture Strategic Plan 2013-2017 is due for completion in early 2014</li> </ul>	<ul style="list-style-type: none"> <li>Construction budget yet to be determined by Southern Grampians Shire Council.</li> </ul>	<ul style="list-style-type: none"> <li>Low priority</li> <li>Advocacy</li> </ul>
<b>Grampians Region Events Strategy</b> (Attraction, Awareness)	Strategy to plan, co-ordinate and promote regional and local events across the entire Grampians Region.	<ul style="list-style-type: none"> <li>Strategy development requires funding and delivery.</li> <li>Ongoing investment in strategic events required.</li> </ul>	<ul style="list-style-type: none"> <li>Strategy investment in the vicinity of \$50,000 to \$80,000.</li> <li>Annual event support budget approx. \$500,000 between Grampians Tourism, local councils and Tourism Victoria.</li> </ul>	<ul style="list-style-type: none"> <li>Low priority</li> <li>Facilitate, plan</li> </ul>

Source: AEC

#### 4.3.1 Mt Arapiles Accommodation and Infrastructure

Mt Arapiles is an isolated extension of the Great Dividing Range located approximately 40km west of Horsham. It was made famous as a world-class rock climbing destination when in 1985 Wolfgang Güllich put up Punks in the Gym, which at the time was the hardest rock climb in the world. The Mount Arapiles-Tooan State Park also has general scenic and recreational values.

Plans have been progressed to develop accommodation at Mt Arapiles to support climbing visitors and other tourists attracted by the feature. This may be supported by additional infrastructure to this section of the Park. It is considered important that any accommodation development at Mt Arapiles is sympathetic to preserving the wild and underdeveloped character of much of the Park.

##### **Key Objectives**

- Improve yield from visiting rock climbers.
- Encourage new rock climbers and park users to the region who appreciate greater comfort.
- Improve the supply of higher quality accommodation options in the region.
- Provide a unique nature-based experience.

##### **Anticipated Benefits**

Accommodation at Mt Arapiles would diversify the visitor base to Mount Arapiles-Tooan State Park. In particular, accommodation at the park would enable attracting higher yielding visitors to the region.

##### **Target Markets**

- High yielding rock climbers seeking ultimate accessibility and comfort when climbing at Mount Arapiles.
- Tourists seeking a unique nature-based lodge experience.

##### **Next Stages**

The *Mt. Arapiles Precinct Plan and Feasibility Study* was developed in 2007 to mixed reception. A proposal for an accommodation development which is sympathetic to the character of the mountain and climbers access is required to progress this opportunity with potential developers.

#### 4.3.2 Wildlife Art Museum of Australia

The Wildlife Art Museum of Australia (WAMA) is a progressed concept for a site near Pomonal near Halls Gap. It aims to be the National centre for works of outstanding Australian Wildlife and Natural History Artists.

The WAMA website introduces the project as:

*The AWAF vision is to make WAMA a project of national significance that will attract international and national recognition*

*The objective for WAMA is to be a major arts and cultural destination, which will complement other tourism attractions in the region sharing the spectacular backdrop of the Grampian Ranges.*

*The Museum with its supporting studios and conference facilities will be surrounded by wetlands and native gardens on 15 hectares of natural bushland at Halls Gap in the Northern Grampians.*

*The Board is committed to the creation, collection and preservation of Australian wildlife and natural history art. The museum and galleries will recognise the works of outstanding Australian wildlife artists, from the early contributions of our first inhabitants through to contemporary artists.*

#### **Key Objectives**

- Build complimentary product in line with regional tourism development themes of wildlife, nature and landscapes.
- Develop complimentary bad-weather activities about the key Halls Gap / Grampians National Park destination.
- If ambition achieved, create a product of national / international repute.

#### **Anticipated Benefits**

Arts and culture is a key way that tourists access and interpret local culture and experiences. WAMA's focus on wildlife and natural history is a natural fit with the Grampians Region.

WAMA has the potential to be a compliment to existing product in the region. It also has the potential to bring a new niche of tourists to the region with a focus on the arts. In Tasmania, Hobart's Museum of Old and New Art (MONA) attracted over 400,000 visitors in its first 18 months, or about one quarter of all visitors to the State. MONA has been a runaway success and is not easily replicated, however it does demonstrate the potential of high quality arts attractions for tourism development.

#### **Target Markets**

- Tourism Victoria's *Lifestyle Leaders* psychographic, particularly *Creative Opinion Leaders* and *Inspired by Nature* types.
- Art enthusiasts.
- Education market.

#### **Next Stages**

The Australian Wildlife Arts Foundation (AWAF) released a Vision Statement for the WAMA project in 2013. The project has a site, approvals and development and operations structure in place. AWAF estimates the cost of developing WAMA at \$10 million and is seeking donations and contributions to develop the project.

### 4.3.3 Nature-based & Eco-Accommodation

The ability for visitors to fully immerse themselves in the natural environment in the Grampians Region is currently mostly confined to day activities and camping. Consumer research and product analysis demonstrates there is a general lack of higher quality and regionally distinctive accommodation to act as marker of the distinction of the region. Nature-based lodges and eco-accommodation is a good fit for the region but will require access to unique sites, likely on National Park or other public lands, about the Grampians National Park, Black Range National Park, Mt Arapiles National Park, Pyrenees State Forest, Mt Langi Ghiran and Mt Cole areas. Opportunities to support the Grampians Peaks Trail with eco-lodge style developments near track will also exist.

The need for this style of accommodation is regional in terms of addressing a key product / experiences gap for the region, however, the opportunities are more localised. Modern nature-based and eco-accommodation is developed with great pains to be integrated into the surrounding environment. However, they need outstanding natural sites in order to be successful. These sites are rarely found outside of National and State Parks. Victoria has recently opened up a process for developing accommodation on public lands.

#### **Key Objectives**

- Develop accommodation product that accentuates the region's key natural assets.
- Improve the supply of higher quality accommodation options in the region.
- Develop complimentary product to the outdoor adventure infrastructure developments in the Grampians Region, such as the Grampians Peaks Trail.

#### **Anticipated Benefits**

High quality accommodation products that are integrated with key regional themes both fill an important niche in the market and help promote the values of the destination.

Historically, iconic accommodation products were the likes of the Gagudju Crocodile Hotel in Arnhem Land (crocodiles being an icon of the Northern Territory), Hamilton Island in the Whitsundays (located on an island within the iconic Great Barrier Reef) or the Sails of the Desert Hotel (with views of Ayers Rock).

Today, expectations of accommodation quality have grown, whilst the discerning tourism market – as exemplified by Tourism Victoria's *Lifestyle Leader* psychographic – seeks more subtle iconic accommodation which is more sympathetic to its environment and surrounds. Examples of current iconic accommodation are Silky Oaks Lodge (Daintree Rainforest, Queensland), The Southern Ocean Lodge (Kangaroo Island, South Australia) or Bay of Fires Lodge (Bay of Fires, Tasmania).

It is anticipated that development of nature-based and eco-accommodation in the Grampians Region will help accentuate the core values of the region, lift the overall standards of accommodation, develop new markets and provide a more coherent image of the region as an iconic, high-quality nature and outdoor destination.

#### **Target Markets**

- Tourism Victoria's *Lifestyle Leaders* psychographic, which dislike poor quality accommodation.
- High yield markets that seek nature immersion experiences without camping.
- Outdoor adventure enthusiasts who seek the ultimate proximity to their activities, a more comfortable accommodation style or to provide partners or children with more comfortable accommodation.

#### **Next Stages**

A small number of nature-based and eco-style accommodation establishments already exist in the Grampians Region. However the availability of suitable sites outside of public lands is limited. The challenges of navigating the process for developments on public lands is too onerous for most boutique to medium investors.



The Grampians Region will need to lead in identifying sites and reducing hurdles to acquisition and developments in order to take opportunities to potential investors. Site selection will be complex, with a large range of planning, stakeholder and environmental management considerations needing to be accounted for as well as the commercial potential for development. Taking the lead on these sites also provides the region the opportunity to guide investment interest into the locations and styles of development that best suit the region. There may also be some opportunity for associated private investment in public infrastructure (e.g. walks and trails development or upgrades) depending on the scale of accommodation projects.

#### 4.3.4 Grampians Region Villages & Produce Regions Project

The Grampians Region contains a number of regional villages and produce regions that are mostly underappreciated by tourists. These villages and produce regions have unique themes and characteristics. The Grampians Region Villages and Produce Regions Project aims to activate these areas, both in development terms and in the consciousness of visitors to the Grampians Region.

The Villages and Produce Regions Project should aim to avoid the regional centres. These centres will be more obvious to visitors and their presence in the project would dilute resources for, and impact from, the primary target villages and produce regions. Villages and regions supported through this initiative are:

- Natimuk (rock climbers and alternative arts village).
- Wartook-Laharum (produce and farm experiences region).
- Colleraine (Picturesque country town).
- Great Western (emerging wine centre).
- St Arnaud (historic wine region).
- Moonambel (historic wine region).
- Avoca (historic wine region).
- Beaufort (Genuine wineries and food).
- Henty Wine Region (State recognised produce region).

##### **Key Objectives**

- Better develop unique regional attractions around the Grampians Region that complement and support the core nature / outdoor adventure / Halls Gap tourism product.
- Provide focus points to tourism investment attraction.
- Improve regional dispersal of visitors.
- Support visitation to key produce and wine regions.

##### **Anticipated Benefits**

Tourists increasingly seek avenues to connect to local culture and environments. Villages are focal points for local communities and are at an accessible scale for visitors to enjoy. Food and wine is a product of local climate, soils and producers' skills and is of endless interest to tourists as an avenue to learning about a region. Tourist expectations have evolved to the point that there is now an expectation of good local food and wine in regional destinations.

The Grampians Region has a long history of food and wine production, and a large number of commercial farmers. However agritourism has increasingly flourished closer to Melbourne, with the Grampians Region recognition for food and wine declining. The immediate benefit from the Grampians Region Villages and Produce Regions Project will be to lift the regions villages, food and wine experiences to be as a whole competitive with regions such as Daylesford, Yarra Valley and Mornington Peninsula. In the longer term, the Grampians Region should aim to regain its position as an original food and wine region, with a distinctive and more authentic character compared to the newer regions closer to Melbourne.

##### **Target Markets**

- All tourist markets, now that high quality villages, food and wine are becoming an expectation of visiting regional areas.
- Tourism Victoria's *Lifestyle Leaders* psychographic are most likely to be first to key into messages about the longer history and greater authenticity of Grampians Region's food and wine.

### **Next Stages**

Individual villages in the Grampians Region have, or are planned to, undertake special master planning attention. However, many other villages and produce regions lack strategic development direction.

A comprehensive exercise across all the region's target villages and produce regions should be undertaken, that builds on existing planning and development work and provides guidance to those without current strategic plans.

There are three key action areas to developing the villages and produce regions:

1. **Planning and investment support** for village and produce regions development, investment attraction, events and activities.
2. **Effective promotion** to potential visitors and existing visitors in the region of village attractions and attributes.
3. **Development of touring routes** between villages with enough visual interest and points of interest along the way to encourage dispersal.

The role of planning around and promoting the regional network of villages and wine and produce region should be undertaken by the Grampians Region Tourism. There is also a critical role for local governments in the region to support the villages and wine and produce regions with infrastructure development and appropriate amendment of their planning schemes and local laws.

#### 4.3.5 Pomonal / Lake Fyans / Halls Gap East Development Zone

The Pomonal / Lake Fyans / Halls Gap East area sits adjacent to Halls Gap and the Grampians National Park and is predominately cleared grazing land. Halls Gap is constrained in size and as it develops further is not a suitable location for more land-intensive tourism developments. There is a need for the Pomonal / Lake Fyans / Halls Gap East 'triangle' to be supported as a spill-over development location for land-intensive tourism operations complimentary to the Halls Gap village product. This is already occurring with establishments such as the Lake Fyans Holiday Park, Grampians Gardens Tourist Park, Grampians Parkgate Resort and Halls Gap Zoo. WAMA is also proposed for this area.

##### **Key Objectives**

- Develop a 'spillover' tourism investment zone for a variety of tourism developments that require greater space than available at Halls Gap.
- Preserve the village atmosphere in Halls Gap.
- Maintain the quality of entrances to Halls Gap under future development pressures.

##### **Anticipated Benefits**

Halls Gap is the dominant tourism destination in the Grampians Region and will remain a key focus of investor attention into the future. There are a range of tourism developments that may work well with the destination's market, however, would damage the character and atmosphere of the area if located in Halls Gap itself. For other opportunities, requirements for substantial areas of land or other factors mean that they cannot be located in Halls Gap.

Facilitating these types of developments in the adjacent Pomonal / Lake Fyans / Halls Gap East area will allow Halls Gap to preserve its character and work towards improving the village further whilst enabling more intensive tourism developments in the general area. A key benefit of successfully implementing Pomonal / Lake Fyans / Halls Gap East area for tourism development is not losing future development opportunities due to incompatible sites.

Many successful tourism villages have these dual zones – Port Douglas overflows to Craiglie, the Australian Alps' Ski Villages into Jindabyne, Noosa Heads into Noosaville.

##### **Target Markets**

- The Pomonal / Lake Fyans / Halls Gap East area is about enabling a broad range of tourism developments to take place, which do not apply to any one particular tourism market.

##### **Next Stages**

Ararat Rural City and Northern Grampians Council produced the Triangle Rural Zone Review for the Ararat / Stawell / Halls Gap bounded triangle in 2012. This identified options for planning changes of this broader zone to better enable tourism outcomes – and a number have been adopted by Ararat Rural City and Northern Grampians Council. However, the majority of the area remains Farming Zone, which prohibits many complementary and dedicated tourism uses.

The Pomonal / Lake Fyans / Halls Gap East area has a special roll within this triangle as the commercial spill over zone and complement to the tourist village of Halls Gap. This area requires attentive planning and development management. Key steps to activating this area are:

- Preparing a structure plan of the area, potentially in concert with a Halls Gap Masterplan, to direct future tourism development and preserve the character of the area and the approaches to Halls Gap.
- Undertaking remaining planning changes to enable tourism development in the area.
- Providing investment attraction and facilitation to potential developments in the Pomonal / Lake Fyans / Halls Gap East area. The strategic intend of the area vs Halls

Gap itself should be communicated publicly and to property professionals active in the region, to assist early communication to potential property buyers and investors as to where their plan fits within the strategic development framework for the region.

#### 4.3.6 Hamilton Arts & Cultural Precinct

Hamilton is the second largest civic centre in the Grampians Region and provides a hub of services to the surrounding rural communities in Victoria and into South Australia. The town has a thriving rural centre with a distinctive arts and cultural base derived from its rural foundations. The Hamilton Arts and Cultural Precinct aims to build on Hamilton's cluster of cultural facilities in Brown Street with urban design developing new art venues, artistic community spaces and activities. Key features of the current plan for the Precinct include: sculpture garden; major street installations; artistic, creative and culturally rich facilities; new spaces for community performances and exhibitions; and library garden overlooked by a balcony in front of the Library.

The Precinct will serve a significant community role but also has the potential to develop as a significant hub for tourists to experience and interact with the local culture of the Hamilton region.

##### **Key Objectives**

- Provide a distinctive precinct for visitors to interact with Hamilton's culture and creative community.
- Revitalise a section of Hamilton's CBD.
- Accentuate a distinctive feature (arts and culture community) of Hamilton to improve its destination value.

##### **Anticipated Benefits**

A strong display of local arts and culture provides a solid avenue for visitors to understand and engage with local communities. This is particularly so when an arts and culture precinct is popular with local communities, as the arts and culture scene becomes an avenue for tourists to engage with local people.

The Hamilton Arts & Cultural Precinct is strongly focussed on developing the community's civic and cultural pride. The more successful it is in engaging the local community, the more beneficial it is likely to be to tourism for the Grampians Region.

An example of the value of an active and visible arts community can be seen in another Grampians Region village, Natimuk. Natimuk has developed a critical mass of artists through cheap housing and studio spaces, and inspiration from the nearby internationally regarded rock climbing destination of Mt. Arapiles. The quality of the arts, and the connection to local landscapes and communities through the rock climbing scene, has significantly enhanced Natimuk's status as a tourist destination.

##### **Target Markets**

- Tourism Victoria's *Lifestyle Leaders* psychographic are the core market interested in exploring local culture through arts. This particularly applies to the *Creative Opinion Leaders* type of the Lifestyle Leaders psychographic.

##### **Next Stages**

The *Brown Street Arts and Cultural Precinct Concept Plan* was completed in 2011. The *Hamilton Arts and Culture Strategic Plan 2013-2017* is due for completion in early 2014 and is anticipated to incorporate creative communities, arts and culture services, cultural heritage, creative places, cultural tourism.

Implementation of the Hamilton Arts and Cultural Precinct will be led by Southern Grampians Shire Council. Support funding will be required for a number of the infrastructure projects. The Grampians Region has a role to support funding applications for the precinct, to support investment attraction of associated businesses and to build the precinct and its attractions into the variety of promotional tools for the region.

#### 4.3.7 Grampians Region Events Strategy

Development of a comprehensive annual events program for the Grampians Region with a focus on visitation and key regional themes. There is scope to use events to increase activity levels at Halls Gap and other villages, to promote regional themes (outdoor adventure, nature, food & wine, regional villages), to leverage marketing of the region (spectator or televised events), increase direct visitation (participatory sports and events), increase activity levels in slow times of the year and celebrate seasons or regionally significant dates (e.g. Wildflower season). Certain events may be developed with private partnerships (e.g. sporting events). Other event types such as regular street markets in Halls Gap (supported by regional food, wine, produce, arts & craft and goods producers) would be an avenue to improve interaction of the main tourist town with the surrounding regions.

The development of the Grampians Region Events Strategy should be led by Grampians Tourism. The key enabling action is to audit existing events in the region in time, by theme and estimate visitation associated with these events by local, intrastate and interstate / international sources. Interstate / international and intrastate visitation generated by events should be the focus of Grampians Region Events Strategy, with events dominated by local visitors to remain driven by local governments in the region. From the events audit it will be possible to identify:

- Periods where the region has high levels of events activities, possibly leading to competition within the region for visitors.
- Periods where the region has few events relevant to interstate / international and intrastate visitors, creating opportunities for additional or shifted existing events.
- Concentrations of events in certain areas of the region, possibly leading to poor visitor dispersal.
- Gaps or oversupply in certain periods of events appealing to particular interest groups, such as outdoor sports, arts or food and wine related themes.
- Gaps in events about key visitation periods (e.g. lack of children relevant events about school holiday periods).

##### **Key Objectives**

- Create product with a direct pathway for attracting more visitors and achieving greater regional dispersal for the Grampians Tourism.
- Focus on surrounding towns and villages and not just Halls Gap as the central venue.
- Improve the sense of vibrancy in Halls Gap and other key tourist villages.
- Provide platforms to promote and celebrate the region's attributes.
- Create activity about seasonally slow periods.

##### **Anticipated Benefits**

Events are a powerful tool to encourage visitation in low periods, create vibrancy and celebrate local themes and specialities. Melbourne has been extremely successful in using events to drive tourism throughout the year and Tourism Victoria is strongly supportive of regional efforts to develop tourism through events in Victoria's *2020 Tourism Strategy*.

The Grampians Region has a strong opportunity to develop events related to themes where it has State, national or international reputation. These niche events may be suited to traditionally slow or shoulder seasons, with a key benefit being more consistent visitation and occupancy levels though the year. Niche themes include various adventure sports, wildflowers, wildlife and local produce & wine.

##### **Target Markets**

- Events can potentially be developed to meet any particular market segment.

- Tourism Victoria's *Lifestyle Leaders* psychographic will be a core target through events targeted for development at the Grampians Region level, with key themes such as nature, adventure sports, food & wine and regional arts & culture.
- An additional target market for events in the Grampians Region will be families, particularly about the school holiday periods.

### **Next Stages**

The Grampians Region Events Strategy has not yet been developed. It is a relatively straightforward initiative to progress given appropriate resourcing and time to develop the audit and formulate a strategy.

Implementing the Grampians Region Events Strategy will require an ongoing budget for strategic sponsorship of events that fit within the direction developed for events for the region. Ongoing resources for developing new events, or attracting existing event organisers to the region, should also be considered.



## 4.4 Destination Specific & Localised Opportunities

*Destination Specific and Localised Opportunities* are those that are anticipated to generate positive tourism outcomes, however, are likely to be localised in their impact, be significantly driven by local community demand or be dependent on factors that are not easy to influence. They are anticipated to create fewer regional synergies or outcomes across the broader Grampians Region.

The key role for Grampians Tourism regarding these opportunities is to increase overall visitation levels and provide generic support for development and business operations (e.g. improve booking and reservations systems).

### 4.4.1 Key Enabling Infrastructure

#### 4.4.1.1 Digital Infrastructure

**Pillar:** Amenity, **Priority:** High

Digital infrastructure differs from the other utilities in that it is rapidly developing as a need to support visitor experiences in the region. There are also visitor and community safety concerns for good mobile communications to facilitate responses to fires and other natural disasters. Many parts of the Grampians Region have poor mobile coverage and high seasonal demand can be an issue in Halls Gap.

Existing telecommunications coverage is strongly driven by commercial considerations, although there is some capacity for communities to subsidise telecommunications companies to install additional communications infrastructure. The new Federal Government has committed additional funding to improve mobile coverage of rural areas and to utilise the NBN to improve mobile services. The tourism industry can be supportive of initiatives to improve coverage, however has little capacity in itself to drive outcomes. The use of mobile coverage and GPS functionality in phones and tablets would be a major aid to self-drive and dispersal of visitors. Improved coverage would also assist in development of websites or Apps for explanation of aboriginal rock art and natural features.

#### 4.4.1.2 Local Touring Roads Improvements

**Pillar:** Access, **Priority:** Medium

Numerous roads across the Grampians Region would benefit from upgrades such as sealing and widening. The Grampians Ring Road project focusses on deficient roads around the core tourism area of the Grampians National Park and has identified several that appear worthwhile to upgrade from a tourism perspective. Road upgrade needs elsewhere in the region have a lesser tourism component, and upgrades primarily need to be driven by local and traditional road funding criteria.

#### 4.4.1.3 Public Transport Improvements

**Pillar:** Access, **Priority:** Low

The Grampians Region is serviced by V/Line from Melbourne to Ararat and Stawell, however bus transfer options to Halls Gap and other areas are limited. The majority of visitors to the Grampians Region are self-driving yet some market segments, such as international visitors and students can be significant users of public transport.

Improved public transport options within the Grampians Region would be positive for tourism, however, would unlikely be a major driver of new visitation. Public transport is almost always a loss making exercise and significant community demand is usually required for funding to be justified.

#### 4.4.1.4 Utilities

**Pillar:** Amenity, **Priority:** Medium

The potential to develop tourism establishments in many parts of the Grampians Region is impeded by lack or cost of utilities such as power connection, water, sewerage and waste services.

Tourism businesses are one user group in a mix of farms, residences and other businesses seeking these services. Infrastructure and service rollouts will largely be determined by cost of delivery relative to the overall user demand. Improved servicing of tourism establishments in the region would be beneficial to the viability of the operators, however, in most cases the broader industry is able to significantly influence rollout schedules.

#### 4.4.2 Other Opportunities

##### 4.4.2.1 Natural Areas Public Use Facilities & Services Improvements

**Pillar:** Amenity, Attractions, Access, **Priority:** Medium

There are a large number of incremental public use facility and service improvements to natural and public areas across the Grampians Region that have been identified at the local level. Identified improvements focus on access and public use facilities at the region's water bodies including:

- Lake Rocklands.
- Lake Fyans.
- Lake Lonsdale.
- Lake Wartook.
- Lake Bellfield day visitor re-development.
- Mora Mora.
- Hamilton.

Access areas and tracks within the region's national parks, state forests and natural heritage areas are also a significant issue across the region including:

- Grampians National Park.
- Mt Arapiles.
- Mt Cole.
- Pyrenees State Forest.
- Black Range.
- Kanwinka Geopark.

Improving these areas is important to continuing to strengthen the ability for visitors to enjoy the region's natural assets. Key investments with greater catalyst potential and regional synergies are discussed elsewhere but other, more localised initiatives are also supported.

##### 4.4.2.2 Dining & Local Produce Retailing Developments

**Pillar:** Amenity, **Priority:** Low

A range of individual opportunities and proposals exist, and will continue to arise, around dining and local food retailing business opportunities. Lifting the quality and local content of food, wine and produce available to visitors in the region is a key improvement required for the destination and actions are recommended around key villages and produce regions. Individual opportunities and proposals that arise around the region are to be supported.

##### 4.4.2.3 Farm & Winery Tourism Developments

**Pillar:** Attractions, Activities, Amenity, **Priority:** Low

Opportunities to develop new tourism product or upgrade existing tourism product in relation to farms and wineries will continue to develop across the region. In general, the Grampians Region has a reasonable cluster of wineries, but a relatively small number of local food and produce producers. A challenge for tourism is that the region's existing farmers are primarily interested in being wholesale producers, and the Grampians Region is not as attractive for tourism focussed producers to establish as the closer regions to Melbourne (e.g. Daylesford Macedon, Yarra Valley, Mornington Peninsula). Clusters of

tourism focussed farm and winery developments will be specifically targeted through the villages and produce regions project, with other developments across the region to be supported as they arise.

#### 4.4.2.4 Regional Arts & Culture Facilities

**Pillar:** Attractions, Activities, Amenity, **Priority:** Medium

Councils across the Grampians Region have, or are looking to develop, arts and culture facilities and events primarily to service their local communities. These facilities and events do service tourists, and should be supported, however they do not generally create enough impact to be a focus for the Grampians Region as a whole. They do assist dispersal around the region and round out the Grampians product that is seen as primarily nature based.

#### 4.4.2.5 Information Centres

**Pillar:** Awareness, **Priority:** Low

The Grampians Region has an extensive number of existing visitor information centres (Ararat & Grampians, Avoca & Pyrenees, Beaufort & Pyrenees, Dunkeld & Grampians, Halls Gap & Grampians, Hamilton & Grampians, Horsham & Grampians, St Arnaud and Stawell & Grampians). Incremental improvements to these centres is supported, however the Grampians Region as a whole should focus on digital information tools as its first priority in this plan.

#### 4.4.2.6 Local Self-Guided Tours and Trails

**Pillar:** Attractions, Activities, **Priority:** Medium

Villages and towns often create self-guided trails between points of interest, for example historical attractions or natural features. These trails add to the local offering for visitors passing through, however have minimal impact for the region as a whole. Whilst they are supported at a local level they are not a focus for the Grampians Region as a whole. Regional trails with strong themes are supported as higher priorities elsewhere.

#### 4.4.2.7 Community Amenity Infrastructure

**Pillar:** Amenity, **Priority:** Medium

Community amenity infrastructure across the Grampians Region is utilised to varying degrees by visitors. Outside of tourism focussed towns such as Halls Gap the usage is primarily by locals. In tourist towns such as Halls Gap, standards and availability of community amenity infrastructure must meet benchmarks and expectations, however, these facilities in themselves are not significant drivers of visitation to the region.

#### 4.4.2.8 Accommodation Developments & Enhancements in the Regional Centres

**Pillar:** Accommodation, **Priority:** High

Accommodation standards across the Grampians Region are, in general, dated, including in the larger regional centres (Horsham, Stawell, Ararat and Hamilton). New investments in modern accommodation is desirable and should be encouraged, but is not a major driver to new tourism potential for the region. The primary driver of investments in this sector will be increased visitation and interest from new operators in the region.

#### 4.4.2.9 Local Events

**Pillar:** Attractions, Activities, **Priority:** Low

The Grampians Region should focus its resources on developing a select calendar of headline events that have the greatest visitation impacts, generate the highest profile outside the region and best advance the region's strategic tourism themes around nature, outdoor adventure, food & wine.

#### 4.4.2.10 Retail Revitalisation

**Pillar:** Amenity, **Priority:** Medium

Revitalisation of retail areas and increase in local content within retailers in towns across the Grampians Region would improve the presentation and interest of the region to visitors. However, the retail base in most of the Grampians Region's centres is primarily keyed to servicing local populations. Retail revitalisation is a worthwhile objective, however, outside of clear tourism areas needs to be driven at the local level with support from tourism rather than driven by the Grampians Region as a whole.

## 5. Implementing the Roadmap

Several opportunities presented in the *Investment Roadmap* have already undertaken significant planning and implementation preparations.

### 5.1 Further Investigations

In support of the *Grampians Tourism Destination Plan & Investment Roadmap*, further detailed investigation and implementation work will need to be undertaken around leading opportunities that do not have existing supporting studies. This work will:

- Develop key strategies and actions required to fulfil market investment in stated projects.
- Develop business cases that detail a clear path for project investment conversion.
- Practical processes for taking action to progress opportunities.

A number of the opportunities will be subject to further study in part B of the *Investment Roadmap*.

### 5.2 Implementation Requirements

Key requirements for implementation of the initiatives in this *Investment Roadmap* are:

- **Planning:** Due to diverse land uses (urban, rural and protected) and government jurisdictions there is always cause for conflict amongst neighbouring land users. Strong planning guidance is required to support future development desired by the region.
- **Policy and Local Law Changes:** Changes to policies and local laws will be required either as a key initiative in itself or to support a number of the initiatives in the Plan.
- **Investment Attraction:** Private sector investments need to be encouraged to achieve a number of the investments. This will not be a simple process as there are genuine constraints to why investments have not already occurred. Investment attraction requires understanding the investment proposition, addressing constraints to the investment, developing the investment case and bringing the investment case to relevant investor's attention.
- **Direct Public Investment:** Direct investment and infrastructure development by local, State and/or Federal governments in the Grampians region is required on an ongoing basis and to support a number of initiatives in this *Investment Roadmap*.
- **Lobbying:** An effective regional voice is required where State or Federal investments and changes to policies are required to enact an initiative. Similar to investment attraction, successful lobbying requires an understanding of the issues to the investments or changes and where possible bringing solutions to the process.
- **Coordination:** Regional organisations such as Grampians Tourism have an important role bringing together disparate parts of the existing industry so that the result is stronger than the sum of the parts.

*Destination Specific & Localised Opportunities* will be primarily implemented by the local governments and existing asset managers (e.g. Parks Victoria) that constitute the Grampians Region.

### 5.3 Action Planning

In addition to further investigations on certain initiatives, Grampians Tourism should include in their annual business plan actions to progress each of the initiatives. The Action Plan should include the following components:

- **Initiative:** Which initiative does the action relate to?
- **Action:** What needs to be done?
- **Responsible:** Who is responsible including potential partners?

- **Tools:** What tools are required/useful?
- **Budget:** What is it going to cost?
- **Timeframe:** When is it going to be commenced by and when should it be completed?

## Appendix A: Six A's of Tourism

The following is reproduced and adapted from Tourism Western Australia (2009) *Five A's of Tourism*, Perth.

The following six 'A' factors represent the essential requirements for successful tourism:



Developing a suitable combination of these factors is at the heart of tourism planning. These can be used by regional tourism organisations to focus activity.

### Attractions

Tourists are motivated to leave their normal place of residence (the origin market) and travel to destinations. What they are actually travelling to can be considered the attraction base of the destination area. A tourist attraction is a place of interest that tourists visit, typically for its inherent or exhibited cultural value, historical significance, natural or built beauty, or amusement opportunities.

Some examples include historical places, monuments, zoos, museums and art galleries, botanical gardens, buildings and structures (e.g. castles, libraries, former prisons, skyscrapers, bridges), national parks and forests, theme parks and carnivals, ethnic enclave communities, historic trains and cultural events. Many tourist attractions are also landmarks.

Tourist attractions are also created to capitalise on unexplained phenomena such as a supposed UFO crash site near Roswell, New Mexico and the alleged Loch Ness monster sightings in Scotland. Ghost sightings also make tourist attractions.

### Activities

Attractions also include the activities that can be undertaken at the destination. These may be physical, for example, diving and white water rafting or they may be passive, for example, sunbaking and relaxing on a beach.

### Access

Transport is needed to physically move tourists from where they live to where they are visiting. Globally, air transport dominates the movement of international visitors. In Australia roads and private motor vehicles serve as significant forms of access. Sealed roads offer greater opportunities for vehicle access. A healthy ground touring sector, either day or extended coach tours, is also required to serve the needs of tourists who prefer not to transport themselves.

### Accommodation

All destinations need accommodation nearby otherwise tourists will have nowhere to sleep. This seems basic enough but investors will only invest in accommodation infrastructure if there is sufficient economic return. Many areas of Australia are blessed with excellent attractions and are readily accessible but (for a whole range of reasons) lack tourist accommodation. In recent years the market has seen a proliferation of accommodation types from basic camping and backpacking facilities to mega-resorts. Successful accommodation development, more than ever before, depends on building the right type of facility to suit the needs of a profitable segment of the market.

## Amenities

Amenities are the services that are required to meet the needs of tourists while they are away from home. They include public toilets, signage, retail shopping, restaurants and cafes, visitor centres, telecommunications and emergency services. Because many of the amenities are government services delivered by local, state and national agencies, a high degree of co-operation is needed, particularly where tourist services may be seen to be competing with the needs of local residents.

## Awareness

Having the best attractions, access, accommodation and amenities in the world is totally useless if the awareness factor is missing. Awareness in this sense has three meanings.

Firstly, the local population must have a positive **attitude** (another A) toward tourism. If the local community sees "tourists as terrorists" then this will have a negative impact.

Secondly, those in the front line of tourism, that is, those who directly interface with tourists must have strong, positive attitudes towards tourists. This includes the shops, post offices, road houses and the many other businesses that come in contact with tourists, not just the hotels and restaurants. In all a local community must be made aware of the value of tourism. The third plank in the awareness platform is market awareness. The destination or more importantly, the destination's image must be a strong, positive one and firmly implanted in the tourist's mind.



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