



# Grampians Strategic Investment Plan & Investment Prospectus

## Project Brief – Expressions of Interest

### 1. Background and Context

The Grampians region requires a **Strategic Tourism Investment Plan** and supporting Investment Prospectus to provide direction for the sustainable product development of the visitor economy across the Grampians region which identifies several game-changing projects, and supports the attraction of investment in the next phase of tourism uplift across the region.

Significant recent initiatives in and around the Grampians (Gariwerd) National Park are:

- Completion and launch of the **Grampians Peaks Trail**, at an investment of >\$30m.
- Release of the **Greater Gariwerd Landscape Management Plan** (draft issued December 2020, final expected to be issued by Parks Victoria by the end of 2021).
- **Tourism Infrastructure Program funding** announced for flagship projects totalling \$18.56m in the Grampians (Gariwerd) National Park, including the **GPT Trailheads** (\$5.0m), **Mackenzie Falls Revitalization** (\$7.76m) and the **Brambuk Revitalization** (\$5.8m) projects. The GPT trailheads project will support the visitor service offering along the extent of the GPT, through the provision of car parking, signage toilets and . The scope of the
- Funding announced for the **Ararat Hills mountain bike trail** project (\$3.0m)

New infrastructure priorities need to reflect the changing tourism and economic environments and to refocus development in line with the Greater Gariwerd Landscape Management Plan (refer below for further information) and future arrival forecasts. The Grampians region will need to ensure its infrastructure and experiences meet the needs of current and new markets/demographic and that it can manage the increased volume of traffic with a quality product and experience.

Dispersal in and around the Grampians National Park and managing visitor movement is also critical to our growth. Visitors need additional key experiences developed across the park that supports dispersal to all corners of the region.

With high occupancy levels and strong growth in domestic overnight visitation, investment into new hotels and high-end resorts across the region is also required.

### **Grampians Peaks Trail**

As one of four long-distance walks being developed as part of the Walk Victoria's Icons portfolio, the Grampians Peaks Trail is ideally located in a region renowned for its outstanding natural landscapes, wildlife and cultural values and will position Victoria and the Grampians National Park (Gariwerd) as a key nature-based tourism destination.

Officially launched on 12 November 2021, the Grampians Peaks Trail (the Trail) provides visitors with a 160-kilometre multi-day walking experience which can be undertaken as a whole trail experience or in sections. Stretching from Mount Zero in the north to Dunkeld in the south, the Trail has been strategically aligned to maximise the 'peaks' experience, encapsulating the vistas which make the area a haven for naturalists, artists, and adventure seekers.

The Trail passes through sites of State and National significance and through four separate local government areas: Horsham Rural City Council, Northern Grampians Shire Council, Southern Grampians Shire Council, and Ararat Rural City Council.

The Trail will attract domestic and international visitors and be a significant driver of growth for the regional Victorian Economy. It is anticipated visitors will spend an average \$134 per visitor (high end walkers through to typical independent walker) with over 80,000 visitor nights per annum generated once the project is complete – a forecast total expenditure by visitors of \$85M per annum.

The development of any successful product begins with a clear understanding of the needs of the market. Examination of the key market trends influencing product and experience development for walking visitors to the Grampians region indicates a clear demand and opportunity to provide a nationally significant trail experience.

Whilst the Trail and associated infrastructure earmarked as part of the \$30.2 million commitment will create a world class trail, the real opportunity is attracting private investment that will complement the asset, drive awareness of the destination, and create more jobs for the region. Therefore, for the Trail to become a significant and unique experience, it must also stimulate new private investment in the Grampians region.

Private investment that depends on and benefits from the Grampians Peaks Trail is vital in developing a world class experience. It will ensure the Trail and its experiences will become "must do" experiences for the growing "Walks" market.

Research completed for Tourism Australia suggests that Australia currently attracts less than 1% of the global overnight / multi-night walking market, whereas nearby New Zealand attracts over 2% of the global market. There is undoubtedly room for Australia (and Victorian experiences such as the Grampians Peaks Trail) to grow its share.

The opportunity for the Grampians Peaks Trail is to both strengthen the offering of extended walking in Australia and to create a new walking experience for international walkers. This is where private investment is vital. With a higher spend per day and a relatively low volume, private investment will

ensure the Trail's market point of difference and market positioning is unique, thereby strengthening the offering and generating economic development for the communities of Western Victoria.

There is a significant need for infrastructure investment to support the GPT across a range of priorities to improve the off-park and on-park visitor experience – and the need for private investment is recognised in the Grampians Peaks Trail Master Plan (2014) and Grampians Tourism's Destination Management Plan (2014).

Our key brand value is Outdoors & Nature but we are currently not delivering on this brand promise and not delivering a world class visitor experience. Many of our iconic attractions are lacking in terms of comfortable visitor access, innovative viewing options, interpretation and general visitor services, including limited commercial offering.

### **Greater Gariwerd Landscape Management Plan**

After extensive research and engagement, a draft Greater Gariwerd Landscape Management Plan (GGLMP) was issued by Parks Victoria for consultation in 2020. The objective of the GGLMP is to provide a plan that underpins the management of the Greater Gariwerd Landscape over the next 15 years to ensure the parks and reserves are protected for current and future generations.

It will do this by conserving and enhancing the precious natural and cultural values of the landscape and the management of visitors. It seeks to recognise these values, define key strategies to protect them and look to a future in which the values are celebrated as part of the heritage of the Grampians region.

The draft GGLMP was developed in partnership with the Gunditj Mirring Traditional Owners Aboriginal Corporation, the Eastern Maar Aboriginal Corporation and the Barengi Gadjin Land Council Aboriginal Corporation and prepared through consultation with a wide range of interested community and stakeholder groups and individuals.

It is imperative that any future planning for the Grampians region (particularly for any investment and/or initiatives within the National Park) is aligned with the principles, objectives and strategies agreed in the GGLMP.

### **Funding announced for other projects in the region**

**GPT trailheads:** The objective of trailheads is to provide a series of beautiful, functional, memorable places that provide orientation and gathering for both day and overnight walkers; and support visitors to celebrate the commencement and conclusion of each walking experience. They also provide critical safety information for visitors. Trailheads are considered essential for the success of the GPT. Early works have been completed at four trailheads, to support the launch of the GPT. Planning and design of the remaining project elements is underway by Parks Victoria, for completion by the end of 2023. Funding of \$5.0 million has been allocated for the project by the Department of Jobs, Precincts and Regions.

**Mackenzie Falls Revitalization:** Mackenzie Falls is one of Victoria's largest waterfalls, surrounded by beautiful green, lush and unspoiled scenery. It is one of the most visited nature-based tourism sites across the State. As identified in the draft Greater Gariwerd Landscape Management Plan, a number of challenges are faced at the precinct, including over-crowding, congestion on trails and safety risks, including drowning. Parks Victoria has been allocated \$7.76 million by the Department of Jobs, Precincts and Regions for the design and implementation of revitalisation works at the Mackenzie Falls precinct by 2024. Preliminary investigations have been undertaken to assess options for revitalisation of visitor facilities, new visitor experiences and trail improvements, as well as options for complementary facilities and experiences at the Zumsteins day visitor area.

**Brambuk Revitalization:** Brambuk: The National Park and Cultural Centre is an iconic, award winning cultural centre and a park information service. Over the last 30 years, Brambuk has supported Gariwerd Traditional Owners as a gathering place for community business, training, cultural heritage services, cultural activities and celebrations. Parks Victoria is currently working with Traditional Owners to plan a Business and Master Plan for Brambuk. A core objective of the work is the re-imagining of Brambuk to determine how the precinct and its offerings should be reshaped to meet the aspirations of Gariwerd Traditional Owners, and the preferences of current and future tourism markets. Priority initiatives will be delivered via the Brambuk Revitalization project by 2024, for which \$5.8 million has been allocated by the Department of Jobs, Precincts and Regions.

**Ararat Hills:** The fundamental requirements of this project are to ensure environmental protection, biodiversity conservation and cultural heritage protection as well as advancements for our traditional land-owners. Whilst managing and promoting these fundamental requirements, this project has the opportunity to establish an extensive and exciting network of sustainable mountain bike trails and facilities that drives visitor growth to the region. This includes the mountain bike offering with 50km of trails and two trail heads as well as walking, fitness and nature trails. Parks Victoria is working with Traditional Owners, Ararat Rural City Council and the Department of Jobs, Precincts and Regions to review and if possible, deliver the project by 2023.

## 2. Project Control Group

Governance and decision making for the project will be managed through a Project Control Group. Members include:

- Grampians Tourism
- Northern Grampians Shire Council
- Southern Grampians Shire Council
- Ararat Rural City Council
- Horsham Rural City Council
- Parks Victoria
- Department of Jobs, Precincts and Regions: Regional Development Victoria
- Department of Jobs, Precincts and Regions: Tourism, Events and Visitor Economy
- Grampians (Gariwerd) National Park Traditional Owner Groups

The Project Control Group will be chaired by Grampians Tourism who will also provide administrative support.

The Project Control Group meets approximately monthly. The Project plan should allow for presentations to the Project Control Group on key activities and draft deliverables as appropriate. Separate project discussions will need to be held with representatives from the above organisations as required, coordinated through Grampians Tourism.

### **3. Project Location**

The scope of the work will be completed across the four LGA's involved, but will be project managed by Grampians Tourism, based in Halls Gap.

### **4. Project Scope**

#### **Project Aim: Supporting Investment in Tourism across the Grampians Region**

In the Grampians, visitation has grown dramatically over the last two decades and the 5-year average annual growth in overnight visitation (pre COVID) was at approx. 10%. Our hero brand of big nature, quality food and wine, cultural and heritage attractions, and natural attractions has positioned our region as an attractive investment proposition.

Tourism is dynamic and competitive. Factors affecting its performance and operation include technology change, market influences, social influences and consumer preferences and aspirations. Understanding how such factors influence tourism choices made by consumers is essential for a successful and sustainable tourism industry.

This Grampians Strategic Tourism Investment Plan aims to identify key investment opportunities in and near the Grampians (Gariwerd) National Park and to help conceptualise, plan and facilitate the development of tourism projects.

#### **Grampians Investment Vision and Objectives**

A key first step in the development of the Grampians Strategic Tourism Investment Plan will be the definition of a Strategic Vision and Objectives for which [a] the Strategic Investment Plan will need to address, and [b] investment options considered in the Strategic Tourism Investment Plan will need to be assessed against to information selection, prioritisation and staging of recommendations for investment planning moving forward. Suggested planning principles and core elements to be incorporated into the Grampians Vision and Strategic Tourism Investment Plan include:

- Provide direction for the sustainable tourism product development in the Grampians region which identifies a number of catalyst projects.
- Develop an investment prospectus of major attractions, accommodation and product development opportunities to build on current hero experiences.
- Focus on identifying and attracting private sector investment.

- Infrastructure priorities which reflect the changing tourism and economic environments and to refocus development in line with Gariwerd Landscape Management Plan and future arrival forecasts.
- Identify opportunities to develop Council, State or private land for new adventure tourism development and deliver new adventure trails (walking / mountain-biking / zip lines).
- Deliver transport options for managing flow of visitor around the GNP and to key hero attractions with seamless distribution and GNP ticketing models.
- Identify infrastructure needs to create a network of activity hubs or hero experiences.
- Identify opportunities for tourism providers and infrastructure to increase accessible tourism around the Grampians.

This Project will:

- Outline the vital considerations in identifying the market demand for an investment idea, selection of a location and specific site in the Grampians, and creation of a development concept.
- Identify sites and experiences associated with the Grampians Peaks Trail suitable for private investment.
- Create an Investment Road Map for potential investors to make the process more efficient and to identify and attract potential investors to the project.
- Undertake an accommodation and experience product gap analysis to help meet the future needs of the visitor economy.

### Project Outputs

The three key elements of the Project can be grouped into the following:

- **Where are we now? (the why):** Review of current tourism service offerings in the Grampians region, including key constraints and opportunities. Refer Work Package [1] for key tasks and deliverables required for this element.
- **Where do we want to be? (the what and when):** Creation of a Vision and Objectives for tourism in the Grampians region, and development of an agreed prioritised list of tourism uplift opportunities that form the basis of the Strategic Tourism Investment Plan for the region. Refer Work Package [2] for key tasks and deliverables required for this element.
- **How do we get there? (the how):** The first activity to facilitate implementation of the Strategic Tourism Investment Plan will be development of an Investment Prospectus that supports attraction of investment into the strategic tourism opportunities recommended in the Plan and facilitates planning and design of new tourism initiatives across the region (\*additional detailed information packs will also need to be developed by project partners including councils, Parks Victoria and DELWP). The other aspect of this will be a marketing campaign for the Investment Prospectus, to ensure suitable potential investors are both identified and engaged regarding investment opportunities. Refer Work Packages [3] and [4] for key tasks and deliverables required for this element.

## **WORK PACKAGE [1]: Research and market analysis to underpin the direction of the project**

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### ***TASKS: Work Package 1***

- Undertake a product and accommodation gap analysis.
- Desktop research on existing studies and research particularly those developed by RDV.
- Research into key initiatives (infrastructure and visitor service offerings) currently being planned that enhance the value proposition of investment in tourism opportunities across the Grampians region.

### ***DELIVERABLES: Work Package 1***

- 1.1 Research and market analysis report

## **WORK PACKAGE [2]: Grampians Strategic Tourism Investment Plan**

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### ***TASKS: Work Package 2***

- Creation of a Vision and Objectives for tourism investments in the Grampians region.
- Identification of tourism uplift opportunities (new service offerings and/or improvements to existing service offerings) for targeted public and private investment opportunities (the primary focus will be private sector investment opportunities). The opportunities should be site specific wherever possible, to enable an evaluation of any local planning constraints and opportunities as part of the analysis.
- Development of a strategic evaluation and prioritisation methodology to enable consistent assessment, prioritisation, staging and communication of recommended investments for inclusion in the Grampians Strategic Tourism Investment Plan; and an agreed template to be used for strategic investment planning documentation (to be prepared for each investment option recommended for inclusion in the Plan).
- Working with key stakeholders as required, development and confirmation of assumptions to be used as the basis for analysis and comparison of investment options.
- Working with key stakeholders as required, analysis and prioritisation (and suggested staging as appropriate) of the investment options using the agreed methodology.
- Development of indicative capital costs (order of magnitude) for all identified infrastructure components of recommended priority projects.
- Development of an Investment Logic Map of the tourism investment process to facilitate and optimise public and private investment attraction.
- For each of the priority tourism investment opportunities included in the Grampians Strategic Tourism Investment Plan, and using the agreed template, progress the investment readiness of options to provide a foundation for future Business Case scoping and development. This may include (for each project) a summary of the indicative infrastructure scope, tourism service offering, commercial opportunities and assumptions, outcomes of the strategic evaluation and prioritisation analysis, key knowledge gaps and risks identified that need to be addressed to confirm the project viability of the recommended investment, and a high level implementation plan for each option (complementary to the Investment Prospectus, refer Work Package 3).
- Identified opportunities to develop Council, State or private land for new adventure tourism development and deliver new activities (e.g. walking trails / mountain-biking / zip lines).

### **DELIVERABLES: Work Package 2**

- 2.1 Report outlining Vision and objectives
- 2.2 Options assessment methodology, and investment option summary template
- 2.3 Tourism investment options list (potential maximum scope of the Plan)
- 2.4 Outcomes of strategic evaluation and prioritisation analysis, and recommendations for inclusion in the Plan.
- 2.5 Consolidation of the outputs from Work Package 1 and Work Package 2 into a Strategic Tourism Investment Plan report.

### **WORK PACKAGE [3]: Development and design of a Grampians Tourism Investment Prospectus**

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#### **TASKS: Work Package 3**

- Provide an overview of the tourism investment process starting with concept, consultation, feasibility, approvals, financial arrangements and construction.
- Provide key data on the recent performance of Grampian's visitor economy and information on statistical resources available to help assess market opportunities.
- Identify the process and consequences of obtaining development approval for the investment concept.
- Highlight local government's central role in informing and assisting tourism investors.
- Outline the process involved and special requirements that come into play if interested in investing in a project on public land.
- Describe the principal elements for business planning and obtaining funding to turn a concept into reality.
- Note: The information prepared will need to be bundled into common tourism investment information, and information tailored to each of the LGAs as appropriate.

### **DELIVERABLES: Work Package 3**

- 3.1 Grampians Region Tourism Investment Prospectus:
  - a. Electronic version of document designed in a format suitable to be printed as a pamphlet / other hard copy promotional material as appropriate
  - b. Information suitable for use as web page content for promotion of investment attraction opportunities

### **WORK PACKAGE [4]:**

#### **Development of a targeted Grampians Tourism Investment Attraction marketing / investor awareness campaign**

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*Note: Quotes and proposals are being sought for Work Package [4], but this is considered an optional item, and will be contracted at the discretion of the Project Control Group after successful completion of Work Packages [1], [2] and [3].*

#### **TASKS: Work Package 4**

- Create a marketing campaign (strategy and implementation plan), including recommendations for:
  - PR initiatives required to support investment attraction



- Social Strategy and social marketing campaign and initiatives to support investment attraction and increased tourism
- Provision of marketing and investment attraction Campaign Management services to support implementation of the Grampians Tourism Investment Attraction marketing campaign.

**DELIVERABLES: Work Package 4**

- 4.1 Grampians Tourism Investment Attraction Marketing Campaign (strategy and implementation plan)
- 4.2 Proposal for marketing and investment attraction Campaign Management services

**Project budget**

Budget allocated for the delivery of Work Package 1, 2 & 3 - **\$150,000 (excluding GST)**

**Please note: A separate budget allocation is available for the Marketing / Investor Awareness Campaign (Work Package 4) (to be negotiated as separate contracted item)**

**Project Timeframes**

- Commence – December 2021
- Completed – April 30, 2022

**Project Assistance and Contact**

- Main contact for project will be supplied by Grampians Tourism. Other assistance will be provided by representatives from the Project Control Group as and when required.

**Conditions of Engagement**

- The contract is a lump sum contract, inclusive of all the works specified and all travelling accommodation and all associated costs.

**The proposed fee payment schedule is as follows:**

- 20% on acceptance of contract
- 20% at completion of Work Package 1: Research report
- 35% at completion of Work Package 2: Strategic Tourism Investment Plan
- 25% at completion of Work Package 3: Grampians Tourism Investment Prospectus
- Completion of Work Package 4: Marketing Investor Awareness Campaign (to be negotiated as separate contracted item)

Final reports are to be received and approved by RDV, and reports must also acknowledge State Government support.

All intellectual property, including all reports, photographic material and supporting data gathered or produced as part of this consultancy are to remain the property of Grampians Tourism and Council Partners.

**Contract Indemnity**

The contractor(s) will perform all work under the consultancy at their own risk and shall indemnify and hold harmless the Project Steering Group against all liabilities, losses, damages, costs and expenses arising out of or in connection with the services provided by the consultant and any act or omissions by the contractor of his/her officers, employees or agents.

**Response to brief**

The project proposal should include:

1. Proposed methodology to be delivered and costs
2. Timing - proposed timing of activity
3. Personnel involved and experience/qualifications to undertake the task, job roles, time allocation/budget breakdown
4. Demonstration of relevant project experience
5. Proposed fee for services