



Northern Grampians Shire Local Area Action Plan

Prepared for: Northern Grampians Shire Council & Grampians Tourism Board Inc



Contents

PART 1: EXECUTIVE SUMMARY	1
1.1. Overview	2
1.2. Strategic Framework	3
1.3. Recommendations	4
PART 2: WHERE ARE WE NOW?	6
2.1. Introduction	7
2.2. Visitation to Northern Grampians Shire	10
2.3. What We Were Told	14
PART 3: WHERE DO WE WANT TO BE?	21
3.1. Strategic Framework	22
3.2. Visitor Forecasts	24
3.3. Visitor Services	25
PART 4: HOW WILL WE GET THERE?	30
4.1. Recommendations	31
PART 5: APPENDICES	51

List of Figures

Figure 1: Strategic Framework	3
Figure 2: Scope of the LAAP	9
Figure 3: Visitor Economy Snapshot 2022 (September YE)	10
Figure 4: Total Visitation, 2013-2022	10
Figure 5: Visitor type (10-year average, 2013-2022)	11
Figure 6: Visitor Spend, 2013-2022	11
Figure 7: Day trip & domestic overnight visitor origin (10-year average, 2013-2022)	12
Figure 8: International overnight visitor origin (7-year average, 2013-2019)	12
Figure 9: Motivation of travel (10-year average, 2013-2022)	13
Figure 10: Visitor Forecasts, 2023 - 2032	24
Figure 11: The Visitor Services Eco-System and its Role in the Travel Cycle	25
Figure 12: Comparative Analysis Lessons	27
Figure 13: VIC Visitation (Calendar YE)	29

List of Tables

Table 1: Priority recommendations linked to the Strategic Investment Themes	4
Table 2: Strategic Investment Themes – More Detail	23
Table 3: Comparative Analysis Lessons – Explained	27
Table 4: Recommendation ranking criteria	31
Table 5: Theme 1 Action Plan	34
Table 6: Theme 2 Action Plan	35
Table 7: Theme 3 Action Plan	37
Table 8: Theme 4 Action Plan	38
Table 9: Theme 5 Action Plan	42
Table 10: Theme 6 Action Plan	44
Table 11: Theme 7 Action Plan	47
Table 12: Theme 8 Action Plan	49
Table 13: Full matrix with values	58
Table 14: Full matrix with scores (unweighted score/weighted score)	59

Acknowledgement of Country

Northern Grampians Shire Council (NGSC) acknowledge Traditional Owners; Wotjobaluk, Jaadwa, Jadawadjali, Wergaia, Jupagulk, and Dja Dja Wurrung peoples who are the Traditional Custodians of the land on which we call Northern Grampians Shire Council. We also acknowledge Gunditjmara and Eastern Marr Traditional Owners' connection to Gariwerd (Grampians National Park). We pay our respects to the Elders both past and present and extend that respect to our other Aboriginal clans.

Abbreviations & Definitions

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

Part 1: Executive Summary

DRAFT



1.1. Overview

Northern Grampians Shire offers an abundant and diverse visitor experience, comprising outdoor adventures, cultural experiences, wineries, a rich history as well as stunning natural landscapes.

1.1.1. The Destination Management Plan

Northern Grampians Shire Council and Grampians Wimmera Mallee Tourism (GWMT) have engaged Stafford Strategy to prepare this Local Area Action Plan (LAAP) to assist Northern Grampians Shire Council, industry, and community to strengthen Northern Grampians Shire's visitor economy, further developing their visitor offering and, as a result, assist in building the resilience needed to mitigate economic vulnerability.

The LAAP has been developed to sit directly under the regional Grampians Destination Management Plan (DMP) that has been developed concurrently with this LAAP. The regional DMP guides the development and growth of the broader regional visitor economy. It reflects the needs and aspirations of the community, industry, Grampians Wimmera Mallee Tourism and the four member councils of the Grampians region including Northern Grampians Shire Council, Horsham Rural City Council, Ararat Rural City Council and Southern Grampians Shire Council.

Image credit: Grampians Estate



1.1.2. Northern Grampians Shire

Northern Grampians Shire encompasses an area of just over 5,900 square kilometres and is situated approximately two hours 45 minutes (235 kilometres) northwest of Melbourne. As of 2022, the LGA had a population of 11,948 residents.¹

The Shire comprises several towns, each of which adds to the destination proposition and fabric of the LGA, however, Halls Gap and Stawell serve as the larger destination hubs providing important visitor infrastructure, supported by Great Western and St Arnaud.

In 2022, the Northern Grampians Shire attracted just over half a million visitors, more than half of which were domestic overnight visitors (64%). The Shire has bucked state and national regional visitor trends in two ways: not only did the Shire virtually see no decline in visitation during COVID-19 (and it has seen a significant rebound during COVID-19 recovery years) but it has a far larger proportion of its visitors being overnight compared with day visitors. This should continue to be leveraged as international travel gradually rebounds, looking for new experiences, and domestic visitors increasingly look to travel offshore.

1.1.3. The Experience

Northern Grampians Shire provides stunning natural landscapes, rich cultural heritage, high-quality recreational and adventure experiences, and a variety of winery experiences.

The LGA's most well-known attractions is the iconic Grampians (Gariwerd) National Park that offers majestic mountain ranges, breathtaking lookouts, cascading waterfalls, and abundant wildlife, creating a setting of unparalleled natural splendour. The Park offers an extensive network of walking trails, (including the multi-day Grampians Peaks Trail) and outdoor activities to provide opportunities for exploration, adventure, and an authentic connection to the natural environment.

The Shire also has imbued and deep indigenous heritage, as it lies within the traditional lands of the Barengji Gadjin (the Wotjobaluk, Jaadwa, Jadawadjali, Wergaia and Jupagulk peoples), the Dja Dja Wurrung peoples and the Guditjmara and Eastern Maar peoples.²

To further enhance and grow Northern Grampians Shire's visitor economy, opportunities include investigating a greater diversity of accommodation (typology and scale), infrastructure projects, enhancing transport connectivity, all-weather attractions and built visitor-ready, bookable attractions.

¹ <https://app.rempln.com.au/northerngrampians/community/population/age>

² <https://goldfieldsworldheritage.com.au/place/northern-grampians>

1.2. Strategic Framework

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

Figure 1: Strategic Framework

Vision Northern Grampians Shire will be recognised as Victoria’s premier nature-based destination, leveraging the Grampians Peaks Trail, and will continue to build on its visitor experience offering, with a particular focus on food, drink, wellness, and First People’s tourism.

Strategic Objectives

1. Facilitate investment in the visitor economy that strengthens the position of Halls Gap as the major staging post for accessing the Grampians Peaks Trail and the national park along with new accommodation for Great Western and Stawell as well.
2. Support First Nations-led product development and delivery of tourism experiences throughout the LGA.
3. Achieve sustainable visitation patterns by growing visitor dispersal throughout the LGA to support business sustainability and growth in all of the towns.
4. Increase visitor yield by growing visitor dwell time and growing overnight visitation through expanding the accommodation base and attractions throughout the LGA.
5. Generate investment in supporting infrastructure that will enable sustainable visitor economy growth, especially in peak periods.
6. Support a cohesive, integrated, and supported industry and community which encourages longer trading hours, especially in weekend periods etc.

Targets

The following performance targets have been identified for Northern Grampians Shire.

510,000 to 612,000

20% Growth

In overnight visitors to Northern Grampians Shire between 2022 and 2030.

\$120m to \$156m

30% Increase

In visitor expenditure in Northern Grampians Shire between 2022 and 2030.

2.6 nights to 3.1 nights

20% Growth

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

Themes

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








1.3. Recommendations




Table 1 outlines the priority recommendations that have been identified in response to the strategic investment themes, vision and objectives outlined. The priority recommendations are ones that will either deliver the greatest economic benefit for Northern Grampians Shire and/or are considered important building blocks for the sustainability of Northern Grampians Shire as a visitor destination. Other recommendations have been identified in Section 4.1.

This Local Area Action Plan is developed for Northern Grampians Shire Council and identifies recommendations in partnership with key stakeholders. The implementation of the recommendations is subject to the Northern Grampians Shire Council's long term financial planning process.

Table 1: Priority recommendations linked to the Strategic Investment Themes

Strategic Investment Theme	Detail	Recommendations
 1 Nature, Recreation and Wellness	Continue to showcase and celebrate the Grampians' spectacular natural environment by encouraging immersive nature-based experiences and delivering supportive infrastructure, facilities, and services to create unmatched and sustainable nature-based, recreational, and complementary wellness experiences.	<ul style="list-style-type: none"> Grampians Rail Trail completion (connection from Stawell to Halls Gap) ☆ ○ Queen Mary Botanic Gardens heritage precinct ○ Grampians Getaway – GROW Development ○ Kara Kara National Park project ○ Recreational fishing and competition ○ The Halls Gap Zoo Link development ○ Stawell Gift ○ The Heatherlie Trail ○
 2 First Peoples	Be led by the Grampians' First Peoples' communities to support distinctive and authentic First Peoples' experiences, to build a greater understanding of their stories in both historical and contemporary forms.	<ul style="list-style-type: none"> Brambuk: The National Park and Cultural Centre upgrade ☆ ○ First Peoples' cultural tourism product development ○ First Peoples' place names ◆ Industry training with First Peoples and Elders including a cultural induction for Licensed Tour Operators ☆ ◆
 3 Food and Drink	Elevate the region's food and drink experiences to showcase the quality produce and provenance available and more strongly connect this with the place and people that lie behind the food.	<ul style="list-style-type: none"> Grampians wine cellars profiling ○ Grampians wine discovery centre (showcase and attraction) ☆ ○
 4 Arts and Culture	Continue to foster the development of the Grampians' emerging and diverse arts and culture scene via its many art galleries, museums, art trails, performing art venues and cultural facilities, connecting visitors with authentic, local experiences, and encouraging them to disperse throughout the region.	<ul style="list-style-type: none"> Dark Matter Discovery Centre ☆ ◆ Grampians culture passport ticket ◆ Railway station/silo art ○ Story of gold fields and link to the current gold mine ○ Underground physics lab promotion ◆ WAMA - National Centre for Environmental Art ○ Support the Victoria's Goldfields to be given UNESCO World Heritage status. ◆ Napier Street, St Arnaud retail facades ○
 5 Regional Accommodation	Focusing on the development of additional accommodation supply for the Grampians, including (but not limited to) larger scale, CBD-based hotel properties, higher-end resort/villa accommodation, destination holiday park accommodation, tiny home-style/off-grid accommodation, glamping-style accommodation along with the retrofitting of existing properties.	<ul style="list-style-type: none"> 4-star accommodation at Halls Gap ☆ ○ Advocate for/encourage motel retrofitting ◆ Designation of sites for worker accommodation and packaging of these to investors ☆ ◆ Glamping pods ○ Great Western accommodation development (60 rooms) ☆ ○ Heritage accommodation in St Arnaud ○

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiatives

Strategic Investment Theme	Detail	Recommendations
<p>6</p>  <p>Identity, Marketing and Placemaking</p>	<p>Continue to grow awareness of the Grampians brand to ensure it is well-recognised and known as a compelling visitor destination.</p>	<ul style="list-style-type: none"> ▪ Advocate to streamline State Government planning process ◆ ▪ Events toolkit for each LGA ◆ ▪ Grampians (Gariwerd) National Park Private Investment Strategy ◆ ▪ Grampians (Gariwerd) National Park Public and Private Investment Strategy to support regional dispersal and Central Corridor Experience Masterplan ☆ ◆ ▪ Greater marketing and profiling of the GPT at a state and national level ☆ ◆ ▪ Greater tourism destination marketing campaign funding to encourage dispersal ◆ ▪ Marketing to car clubs and associations (classic, vintage, veteran) ◆ ▪ Regional visitor servicing strategy ☆ ◆ ▪ Review of LGA planning schemes ☆ ◆ ▪ Tourism awareness (value of the visitor economy) campaign for residents ◆ ▪ Tourism investment marketing campaign ☆ ◆ ▪ Tourism planning zones study ◆
<p>7</p>  <p>Industry Development and Collaboration</p>	<p>Fostering the development of the Grampians' industry via ongoing engagement, collaboration, and training to develop a strong and visitor-ready industry across the region.</p>	<ul style="list-style-type: none"> ▪ Development Approval Concierge for tourism businesses ◆ ▪ Distribution of SpendMap data ◆ ▪ Expanding in-region tourism training opportunities for locals ◆ ▪ F&B roster development ◆ ▪ Food & Wine Appreciation training program ◆ ▪ Industry development training (customer service, product/experience development, social media, marketing, grant application writing) ☆ ◆ ▪ Small Business Bus by Business Victoria profiling ◆
<p>8</p>  <p>Supporting Infrastructure</p>	<p>Supporting visitor economy growth by advocating for investment into infrastructure, transport connections and visitor services.</p>	<ul style="list-style-type: none"> ▪ Electric charging stations around the Grampians ◆ ▪ Halls Gap southern gateway ◆ ▪ Halls Gap worker transport ◆ ▪ Heath Street upgrades & bridge ☆ ○ ▪ Lake Bellfield improvement ○ ▪ MacKenzie Falls master plan ○ ▪ Pedestrian priority for Halls Gap (once Heath Street bridge is developed) ☆ ○ ▪ Public (paid) shuttle to key Grampians sites during peak periods ○ ▪ Road improvements to VicRoads ◆ ▪ Signage audit & upgrades (entrance statements, directional & interpretive) ◆ ▪ Staff shuttle (Halls Gap to Pomonal and Ararat) ◆

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiative

Part 2: Where Are We Now?

HALLS GAP

2.1. Introduction

Northern Grampians Shire Council (Council) and Grampians Wimmera Mallee Tourism (GWMT) have developed this Local Area Action Plan (LAAP) to set out the vision and aspirations for the visitor economy for Northern Grampians Shire over the next five years.

This plan has been developed parallel with the Grampians Destination Management Plan (DMP) and aligns strongly with this.

This LAAP provides a key document to assist Council, industry and community to strengthen Northern Grampians Shire's visitor economy, further developing their visitor offering and, as a result, will assist in building the resilience needed to mitigate economic vulnerability.

The area covered by the LAAP is indicated in Figure 2.

2.1.1. Methodology

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

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

2.1.2. Industry and Community Consultation and Investigations

The input received from the community and industry was invaluable and provided a key resource for the LAAP's preparation. The following consultation was undertaken.

- Industry consultations (one-on-one sessions) along with several workshops and focus group sessions with a variety of stakeholders across the LGA.
- A major survey that was distributed to the community and industry focused on Northern Grampians Shire's visitor economy (the findings of which are included in Section 2.3.1). This provided feedback from a wide range of stakeholders which illustrated alignment between community and industry in aspirations and outcomes.

2.1.3. About Northern Grampians Shire

Northern Grampians Shire is a local government area (LGA) located in the Grampians region of Victoria. It is situated approximately 220 kilometres northwest of Melbourne. Northern Grampians Shire covers an area of about 5,919 square kilometres and encompasses several towns, settlements, and rural areas.

The Shire is named after the Grampians mountain ranges, which are a significant natural feature of the region. It is known for its diverse landscapes, including mountains, forests, waterfalls, and wide-open plains. The area is home to rich indigenous cultural heritage, stunning natural beauty, and a range of recreational opportunities.

The major town and administrative centre of Northern Grampians Shire is Stawell. Stawell is a historic gold mining town and hosts the renowned Stawell Gift, a prestigious athletics event held annually on Easter weekend. The event attracts athletes from around the world and is a significant highlight of the town's calendar.

Other townships and localities within Northern Grampians Shire include:

- Halls Gap: Halls Gap is a popular tourist destination located within the Grampians (Gariwerd) National Park. It offers a range of accommodation options, cafes, galleries, and outdoor activities such as hiking, rock climbing, wildlife spotting, and scenic drives.
- St Arnaud: St Arnaud is a historic town known for its well-preserved Victorian-era architecture. It has a rich gold mining heritage and features charming streetscapes, museums, and heritage trails.
- Great Western: Great Western is a small town famous for its vineyards and wineries. It is known for producing cool-climate wines, and visitors can enjoy wine tasting, cellar door sales, and vineyard tours.
- Navarre: Navarre, which partly falls in the Northern Grampians Shire, is a rural town situated in the western part of the shire. It is primarily an agricultural area, with farming activities such as sheep and cattle farming and cereal crop production.

The Shire's economy is diverse, with a mix of industries that contribute to the region's economic growth and development. Some of the Shire's key sectors include the following.

- Agriculture: Agriculture plays a vital role in the economy of Northern Grampians Shire. The region is known for its productive agricultural land, supporting a range of farming activities. Agriculture in the area includes grazing, cropping, viticulture, horticulture, and livestock production. Farmers in the region produce commodities such as grains, fruits, vegetables, wool, beef, lamb, and wine grapes. Agriculture contributes to employment opportunities and generates income through the sale of agricultural products.
- Tourism: Tourism is a major sector, which primarily leverages Grampians (Gariwerd) National Park. The park attracts visitors with its stunning

natural landscapes, hiking trails, waterfalls, and wildlife. Popular tourist destinations within the Northern Grampians Shire include Halls Gap, Stawell, and the nearby Grampians wineries. Tourism-related businesses, such as accommodations, restaurants, cafes, tour operators, and retail shops, benefit from visitor spending and contribute to the local economy. Further product development and profiling across the food, drink, wellness and First People's product areas will complement the Shire's existing offering.

- **Manufacturing:** The Shire has a diverse manufacturing sector. It includes food processing, timber products, metal fabrication, machinery, and equipment manufacturing. Thomas Foods is a major company within the shire. The food processor largely contributes to the local economy through employment, both local and migrant workers and exports 'Grampians lamb' near and far. The manufacturing industry provides employment opportunities and contributes to the local economy by producing goods for domestic and export markets.
- **Retail and Services:** The major towns in Northern Grampians Shire, such as Stawell and St Arnaud, serve as retail and service centres for the region. They offer a range of retail outlets, including supermarkets, specialty stores, and local businesses. The towns also provide essential services such as healthcare, education,

professional services, and hospitality, supporting local employment and meeting the needs of residents and visitors.

- **Mining:** The Shire has a history of mining activities, particularly gold mining. While the scale of mining has reduced compared to the past, there are still mining operations in the region, contributing to employment and economic activity.

These sectors collectively contribute to the economy of the Shire, providing employment opportunities, driving economic growth, and supporting the overall development of the region. The agricultural heritage, manufacturing capabilities, tourism attractions and retail services contribute to the economic vitality of the area.

The Shire offers a range of recreational opportunities, including bushwalking, camping, fishing, cycling, and exploring the natural beauty of the Grampians (Gariwerd) National Park.

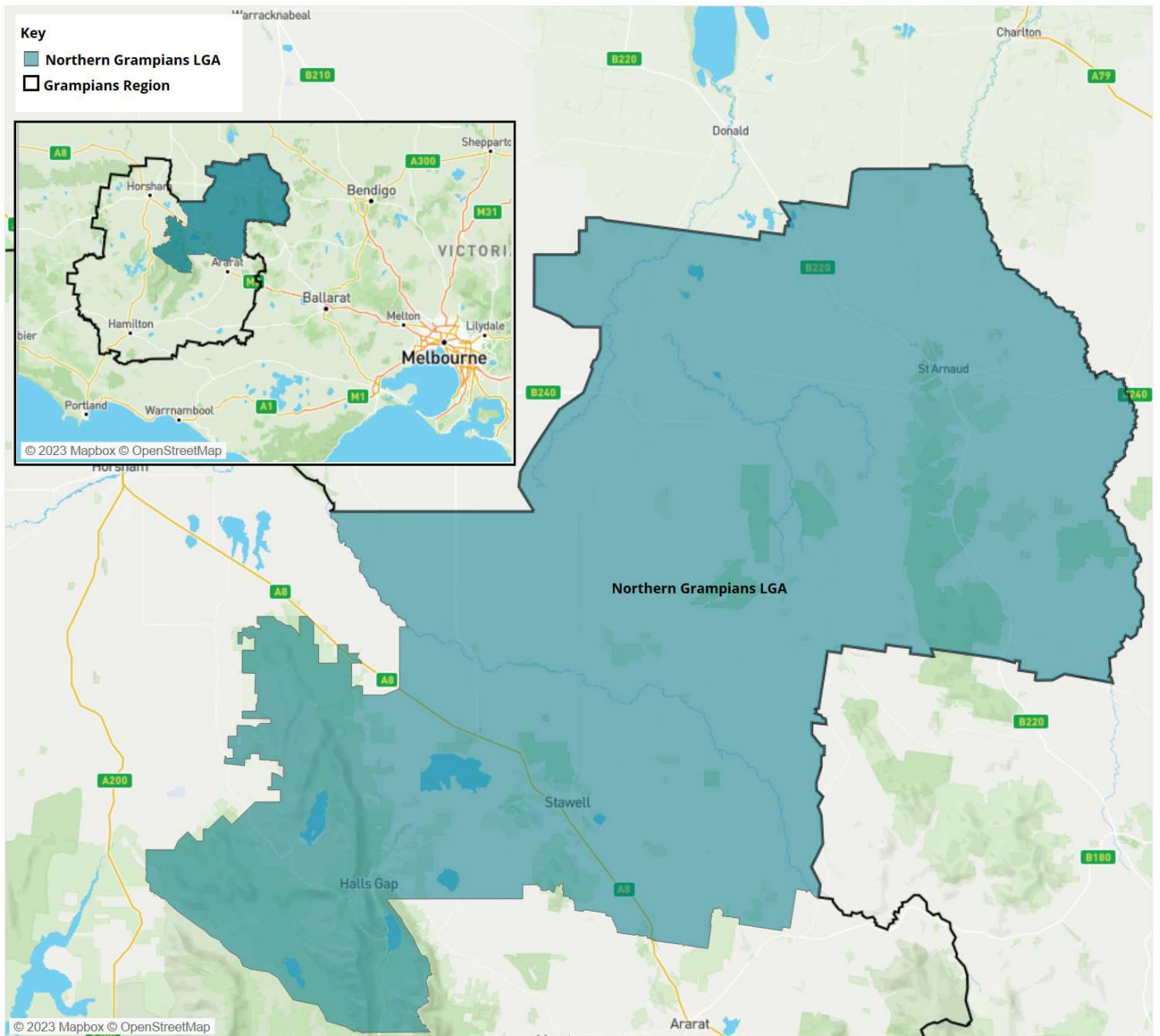
Although there is a diverse range of experiences available in the Shire, experiences that are often noted include:

- **Exploring Halls Gap town:** Halls Gap is a town nestled in the heart of the Grampians. The town has art galleries, boutique shops, and cafés.
- **Iconic sites and experiences within Grampians (Gariwerd) National Park:** the Park is a major highlight of the region and contains rugged mountains, stunning lookouts, and iconic rock formations.

- **Brambuk the National Park & Cultural Centre:** Provides visitors with the opportunity to learn about the Indigenous culture and history of the area.
- **Halls Gap Zoo:** Located in Halls Gap, the Halls Gap Zoo offers a unique opportunity to see a variety of native and exotic animals including getting up close to kangaroos, koalas, and wombats, and meeting rare and endangered species from around the world.
- **Grampians Grape Escape:** Targeted at wine enthusiasts this is an annual food and wine festival held in Halls Gap. It showcases the best of the region's wineries and local produce, offering wine tastings, gourmet food stalls, and live entertainment.
- **Exploring St Arnaud:** St Arnaud is a historic gold rush town with well-preserved architecture and heritage sites. St Arnaud is on the Silo Art Trail, including wall art murals of local faces throughout the town.
- **Experience Wartook Valley:** Wartook Valley is a picturesque region within the Grampians, known for its scenic beauty and wildlife and includes sites like Boroka Lookout, Mackenzie Falls, and Lake Wartook.

In summary, the Shire provides a rich and diverse visitor experience, including outdoor adventures, cultural experiences, a rich history, wineries as well as stunning natural landscapes.

Figure 2: Scope of the LAAP



2.2. Visitation to Northern Grampians Shire

2.2.1. Visitor Economy Snapshot

Figure 3: Visitor Economy Snapshot 2022 (September YE)³



510,000

Trips in 2022

35% domestic day trip
64% domestic overnight
0.5% international overnight



856,000

Nights in 2022

99% domestic overnight
1% international overnight



\$120 m

Spend in 2022

15% domestic day trip
85% domestic overnight
0.4% international overnight



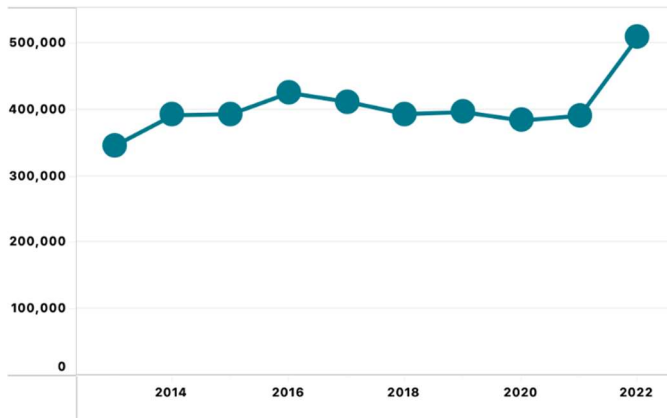
2.6 nights

Average Length of Stay

2.6 nights – domestic overnight
2.7 nights – international overnight

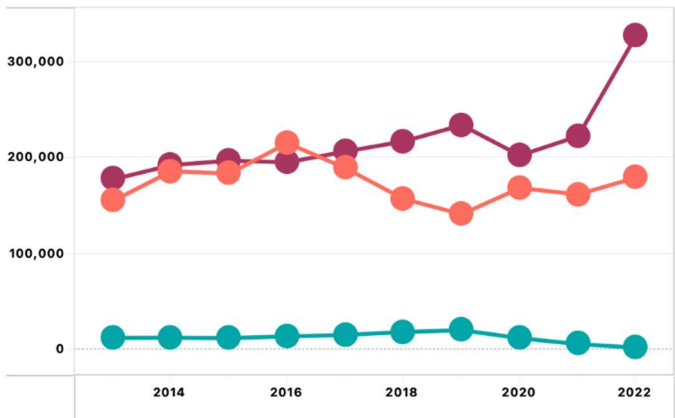
Figure 4: Total Visitation, 2013–2022⁴

Total Visitation to the Northern Grampians Shire



LGA
■ Northern Grampians Shire

Visitation to the Northern Grampians Shire by Visitor Type



Visitor Type
■ Domestic Day ■ Domestic Overnight ■ International Overnight

2.2.2. Historic Visitation

Northern Grampians Shire has a strong visitor base, averaging just over 400,000 visitors over the past 10 years.

Most importantly, unlike most destinations around the country, the Shire’s visitor numbers were only minimally impacted by COVID-19 and have recovered very strongly, increasing by 33% between 2020 and 2022 (total growth of 126,000 visitors). This growth was driven by a significant increase in domestic overnight travel, which, over the same period, grew by 62% (or 125,000 visitors).

It is considered that this growth was driven by the large number of intrastate visitors undertaking regional holidays when intrastate lockdowns were easing and there was a lack of confidence to travel further afield.

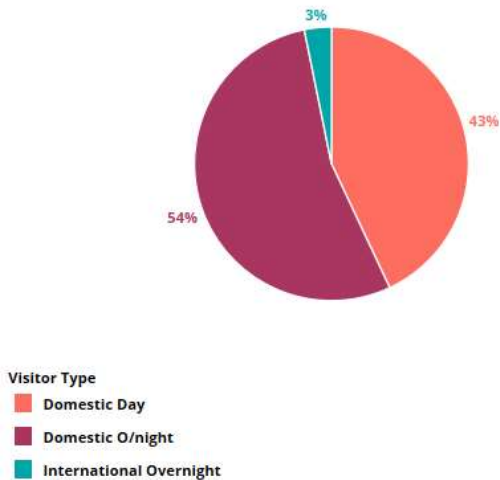
Northern Grampians Shire is the only LGA in the Grampians region to have experienced this level of domestic overnight visitor growth. It is also the only LGA where, over the last 10 years, domestic overnight visitation has comprised a greater share than domestic day visitation (see Figure 5) illustrating its dominance as a leisure hub for domestic visitors.

³ National and International Visitor Survey, Tourism Research Australia. Based on three-year averages, with the exception of COVID-19 impacted data from 2020 to 2022.

⁴ Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

Figure 5: Visitor type (10-year average, 2013–2022)⁵

Visitor Type to the Northern Grampians Shire

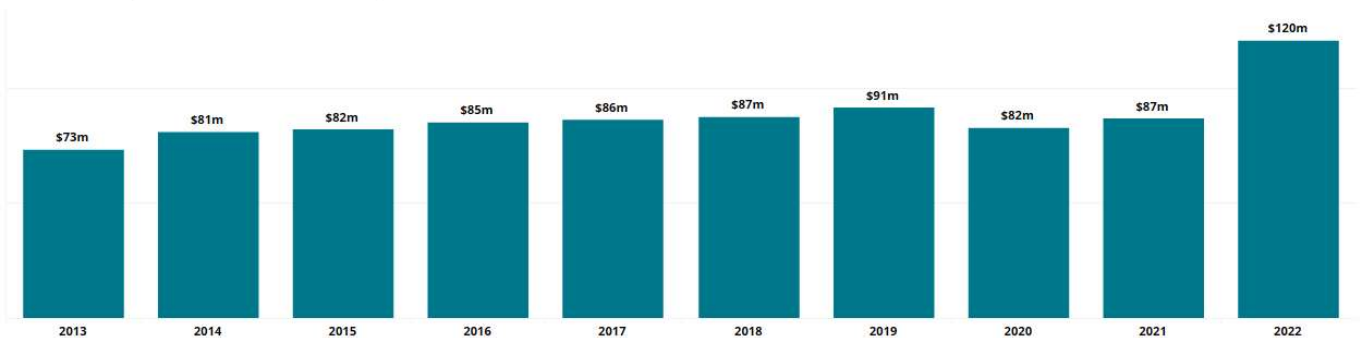


2.2.3. Historic Visitor Spending

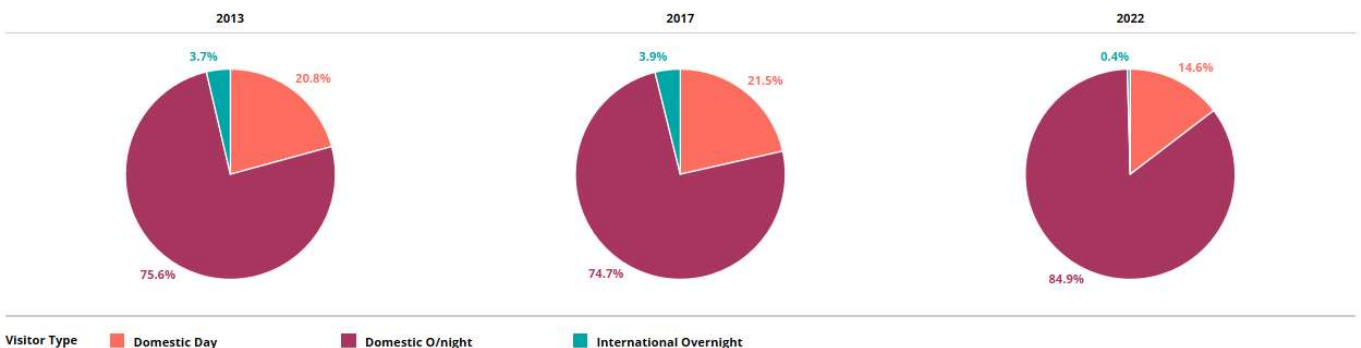
While the day trip market forms an important component of the visitor economy, it typically is relatively low yielding, accounting for

Figure 6: Visitor Spend, 2013–2022⁶

Total Visitor Spend in the Northern Grampians Shire



Spend by Visitor Type in the Northern Grampians Shire



only 15% of visitor spending in the LGA in 2022, despite comprising 35% of total visitation. Domestic day trippers, on average, spent \$98 in the region, compared with domestic overnight visitors who spent 3.2 times this amount at \$312 per trip. Higher spending by overnight visitors is generated because of additional spending on accommodation, food and beverage, transport, attractions etc.

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

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

⁵September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

⁶Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

2.2.4. Source Market

Currently, Northern Grampians Shire is largely an intrastate visitor destination.

- The domestic day trip market is overwhelmingly made up of Victorians, comprising 99% of all travellers over the last 10 years. The remaining 1% originate from South Australia.
- Victorians also make up most domestic overnight visitors, totalling 81% of all travel over the last 10 years, of which, anecdotally, the majority are from greater Melbourne. This is followed by South Australians (10%), NSW residents (5%), Queenslanders (2%) and those from other states/territories (2%).

- Pre-COVID-19, key international markets included Germany, the UK, and the USA/Canada. These tend to represent more experiential international markets who tend to be free independent travellers that would be drawn to the product that the Shire offers. There is an opportunity to now restart to target international target markets as international travel returns, though the core focus should be the domestic market. With the completion of the GPT, which is an export-ready product, the opportunity exists to promote this specifically to a nature/outdoors market seeking nature and wildlife experiences. This also taps into higher-yielding niche markets such as bird watchers, those visiting to view orchards and wildflowers, and those seeking guided walking experiences.

Figure 7: Day trip & domestic overnight visitor origin (10-year average, 2013-2022)⁷

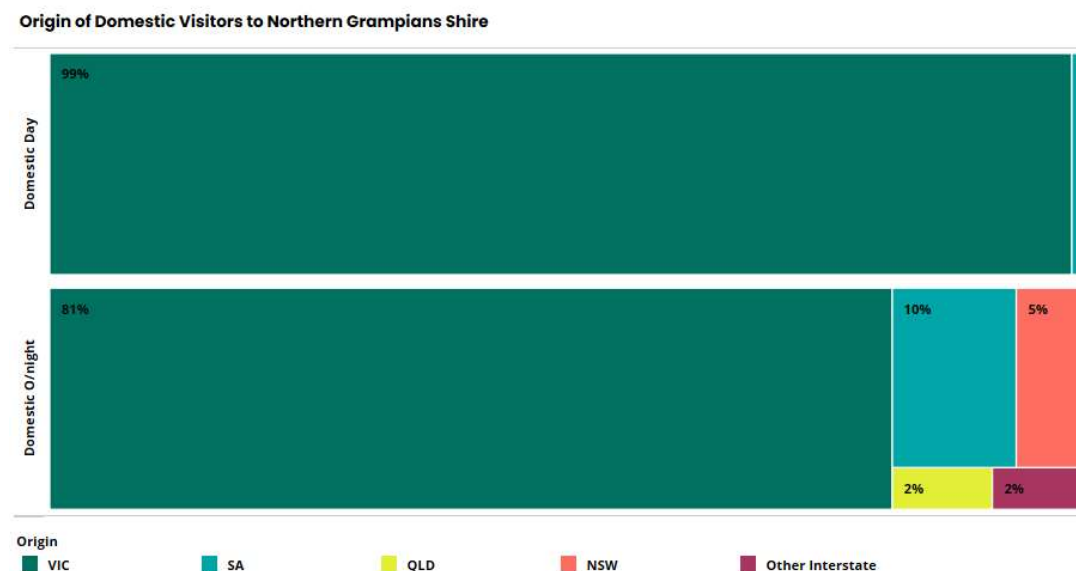
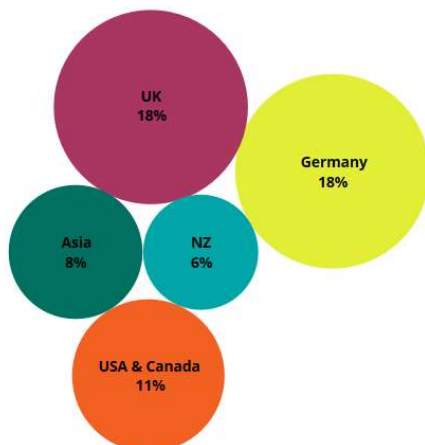


Figure 8: International overnight visitor origin (7-year average, 2013-2019)⁸

Origin of International Visitors to Northern Grampians Shire



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

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















2.2.5. Motivation of Travel

Northern Grampians Shire is primarily a leisure destination, with this being the primary motivation for travel across all visitor markets. This aligns with the current destination proposition of the Grampians and is a strength for the region given the propensity of holiday visitors (when compared with other motivations) to undertake bookable, commissionable products, when available.

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

Figure 9: Motivation of travel (10-year average, 2013–2022)⁹

Visitor Type	Motivation	%
Domestic Day	 Holiday	60%
	 VFR	18%
	 Business	12%
	 Other	9%
Domestic O/night	 Holiday	66%
	 VFR	21%
	 Business	10%
	 Other	4%
International Overnight	 Holiday	94%
	 VFR	4%
	 Business	2%
	 Other	0%

⁹ Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

2.3. What We Were Told

2.3.1. Survey

A survey was distributed over two months to the community and industry throughout Northern Grampians Shire and the broader Grampians region. The survey received 200 responses in total, of which 52 indicated they were primarily associated with the Northern Grampians Shire.



52 responses

Response Rate

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

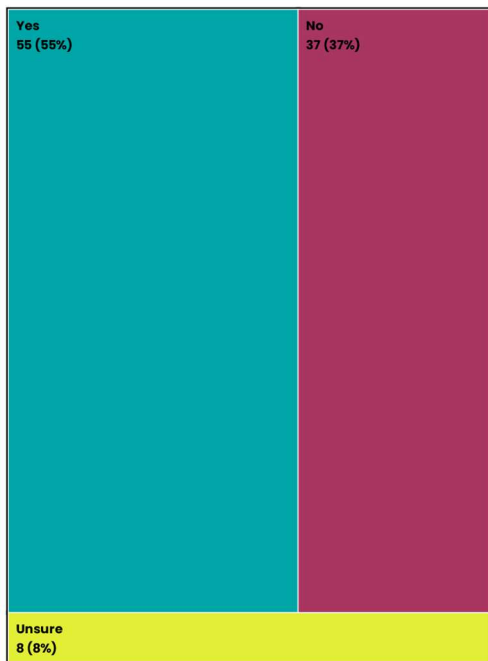
The following provides the findings of the survey responses from Northern Grampians Shire respondents.

2.3.1.1. Question 1

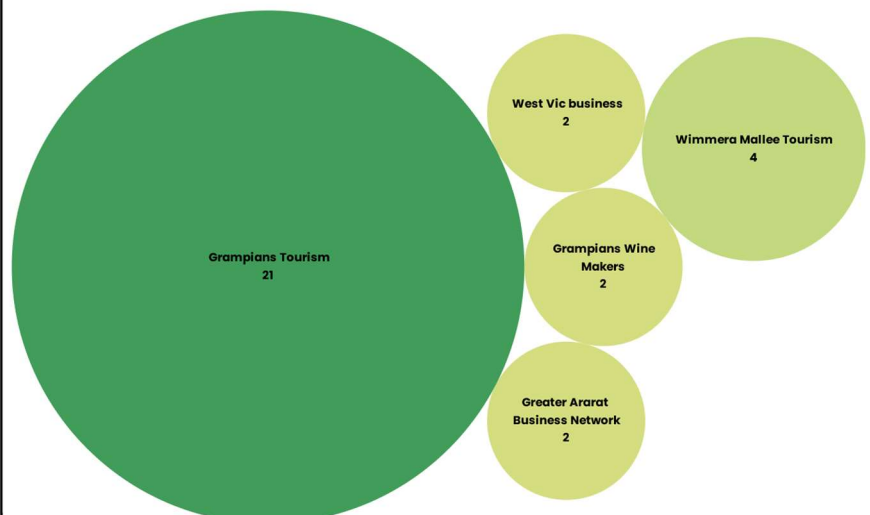
Name – Confidential

2.3.1.2. Question 2

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



Top Networks respondents belong to



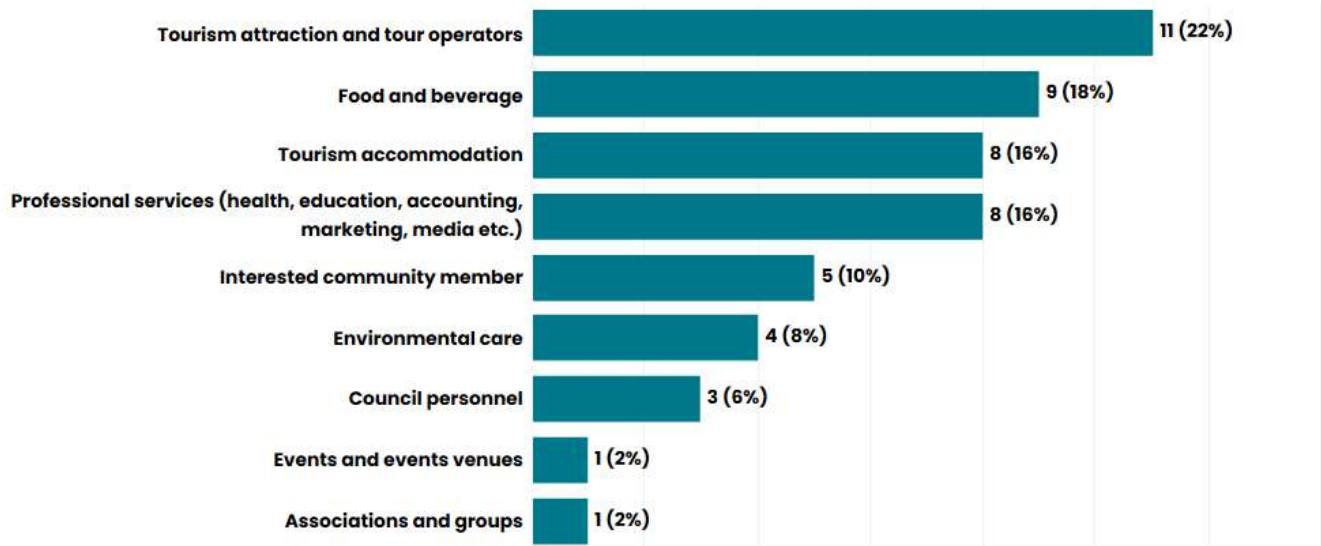
2.3.1.3. Question 3

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

52 indicated Northern Grampians Shire

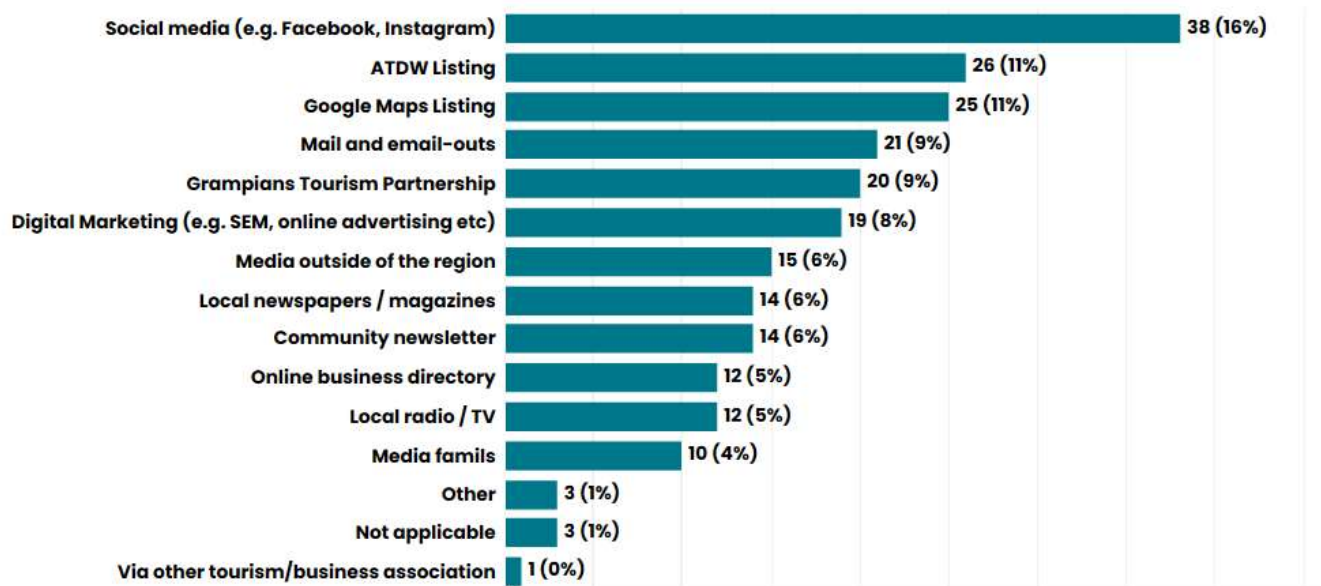
2.3.1.4. Question 4

4. What best describes your business/organisation? (If you fall into more than one category, please select the most relevant category that pertains to you)



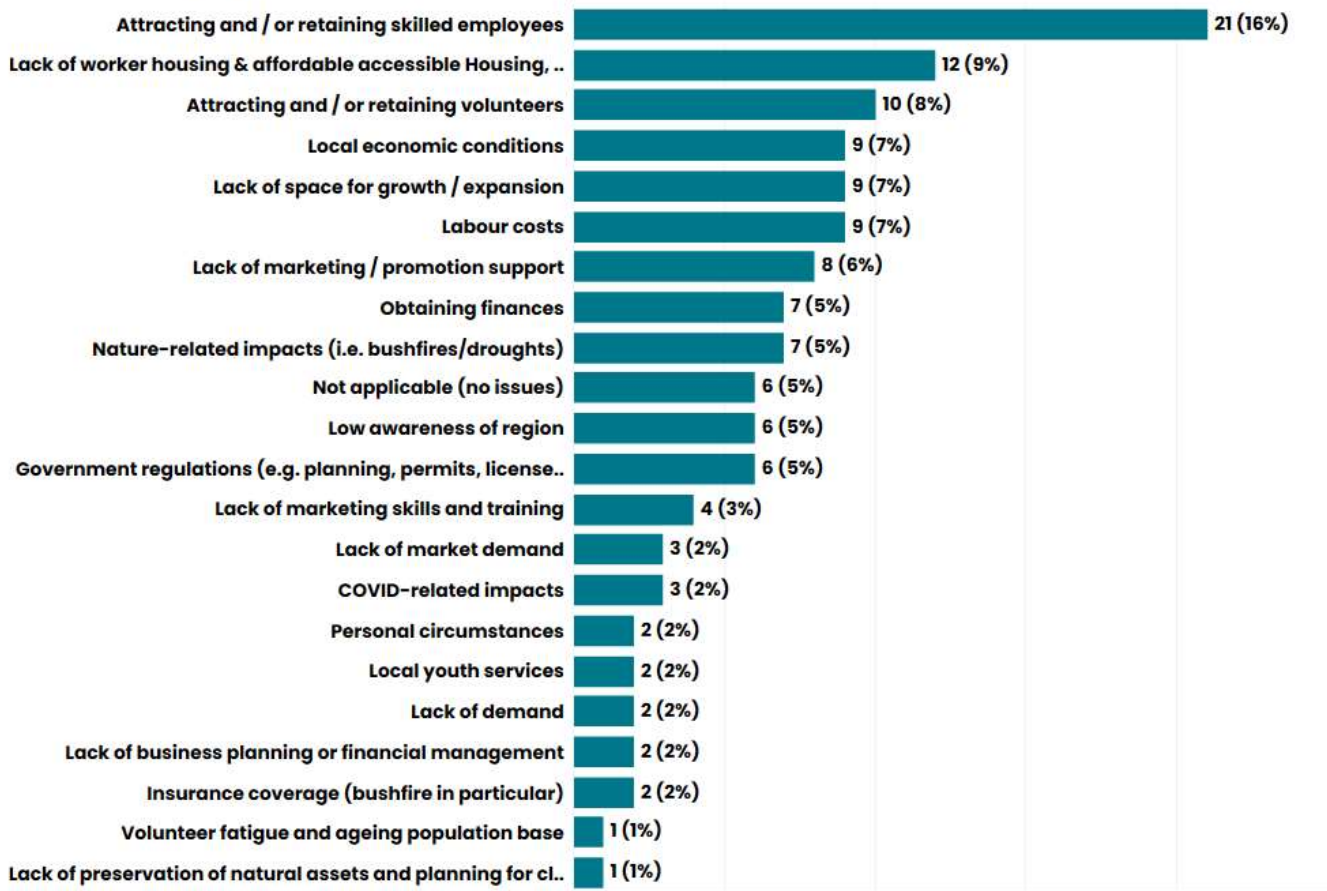
2.3.1.5. Question 5

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



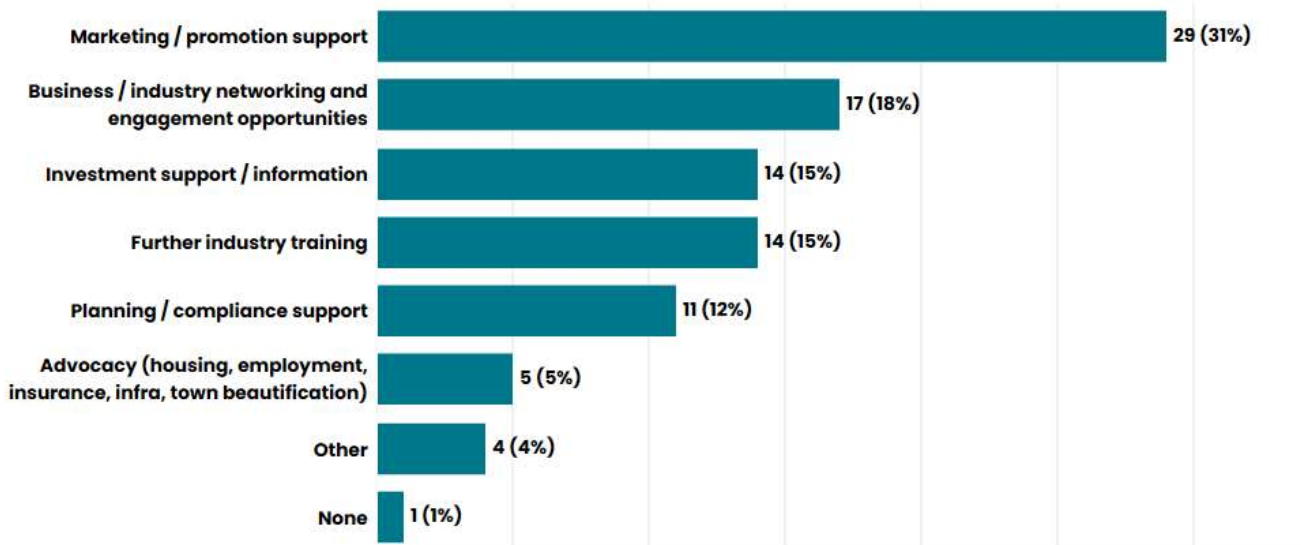
2.3.1.6. Question 6

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



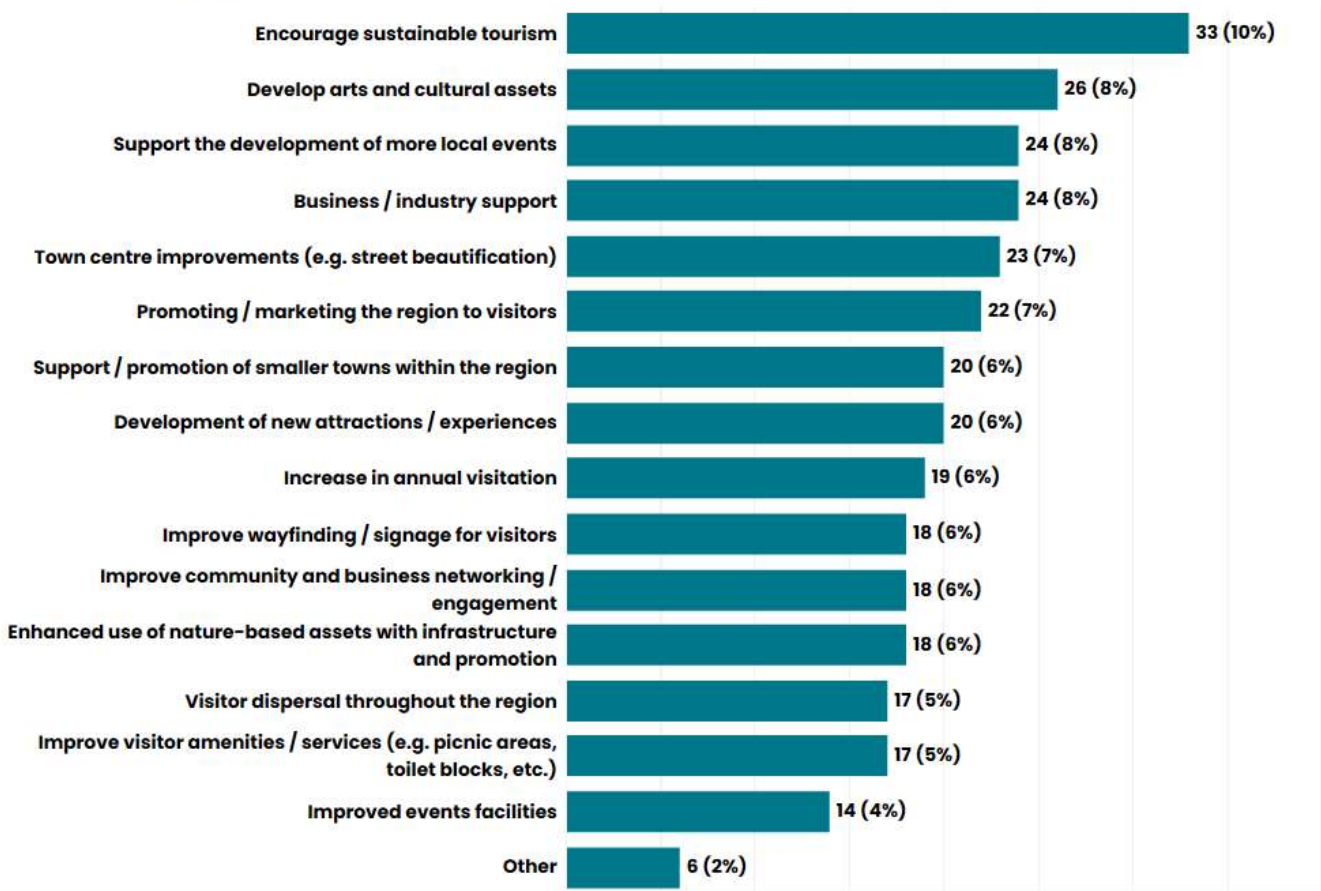
2.3.1.7. Question 7

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



2.3.1.8. Question 8

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



2.3.1.9. Question 9

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



2.3.1.10. Question 10

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



2.3.1.11. Question 11

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



2.3.1.12. Question 12

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

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

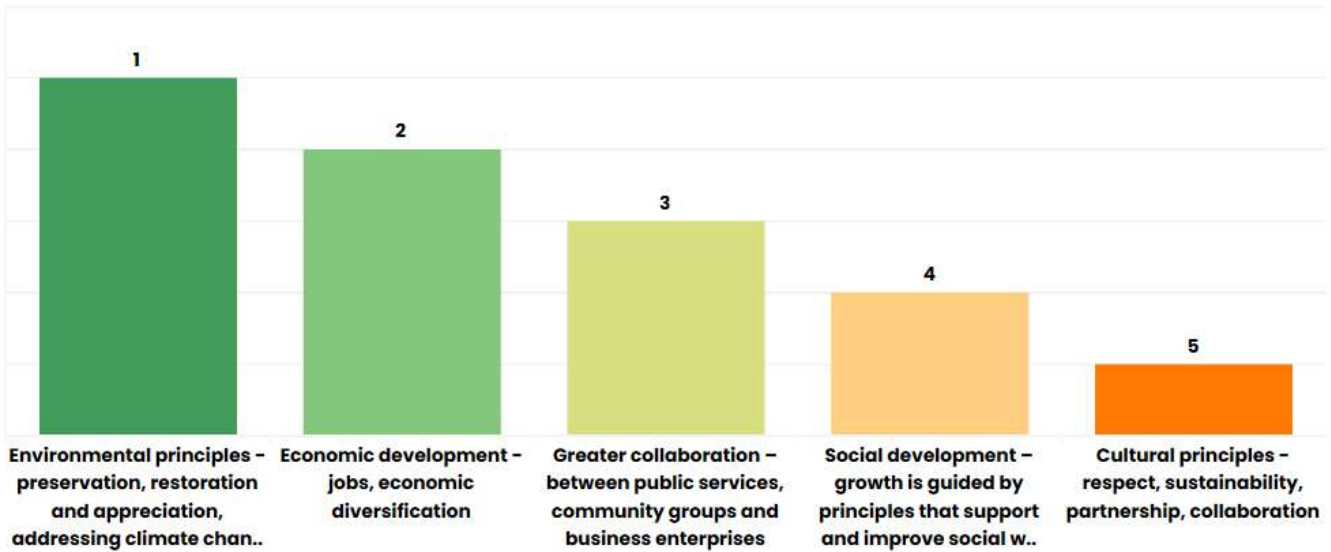
2.3.1.13. Question 13

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

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

2.3.1.14. Question 14

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



2.3.1.15. Question 15

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



Part 3: Where Do We Want to Be?

3.1. Strategic Framework

The following strategic framework has guided the development of this LAAP and should be used to direct tourism development in the LGA going forward. It has been developed to align directly with the Grampians DMP Strategy Framework.

Vision Northern Grampians Shire will be recognised as Victoria’s premier nature-based destination, leveraging the Grampians Peaks Trail, and will continue to build on its visitor experience offering, with a particular focus on food, drink, wellness, and First People’s tourism.

Strategic Objectives

1. Facilitate investment in the visitor economy that strengthens the position of Halls Gap as the major staging post for accessing the Grampians Peaks Trail and the national park along with new accommodation for Great Western and Stawell as well.
2. Support First Nations-led product development and delivery of tourism experiences throughout the LGA.
3. Achieve sustainable visitation patterns by growing visitor dispersal throughout the LGA to support business sustainability and growth in all of the towns.
4. Increase visitor yield by growing visitor dwell time and growing overnight visitation through expanding the accommodation base and attractions throughout the LGA.
5. Generate investment in supporting infrastructure that will enable sustainable visitor economy growth, especially in peak periods.
6. Support a cohesive, integrated, and supported industry and community which encourages longer trading hours, especially in weekend periods etc.

Targets

The following performance targets have been identified for Northern Grampians Shire.

510,000 to 612,000
20% Growth

In overnight visitors to Northern Grampians Shire between 2022 and 2030.

\$120m to \$156m
30% Increase

In visitor expenditure in Northern Grampians Shire between 2022 and 2030.

2.6 nights to 3.1 nights
20% Growth

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

Themes

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



1. Nature, Recreation and Wellness



4. Arts and Culture



7. Industry Development and Collaboration



2. First Peoples



5. Regional Accommodation



8. Supporting Infrastructure











3. Food and Drink



6. Identity, Marketing and Placemaking

Table 2 provides more information on each of the Strategic Investment Themes that have been identified for this LAAP. These align directly with the themes identified within the Grampians DMP.

Table 2: Strategic Investment Themes – More Detail

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

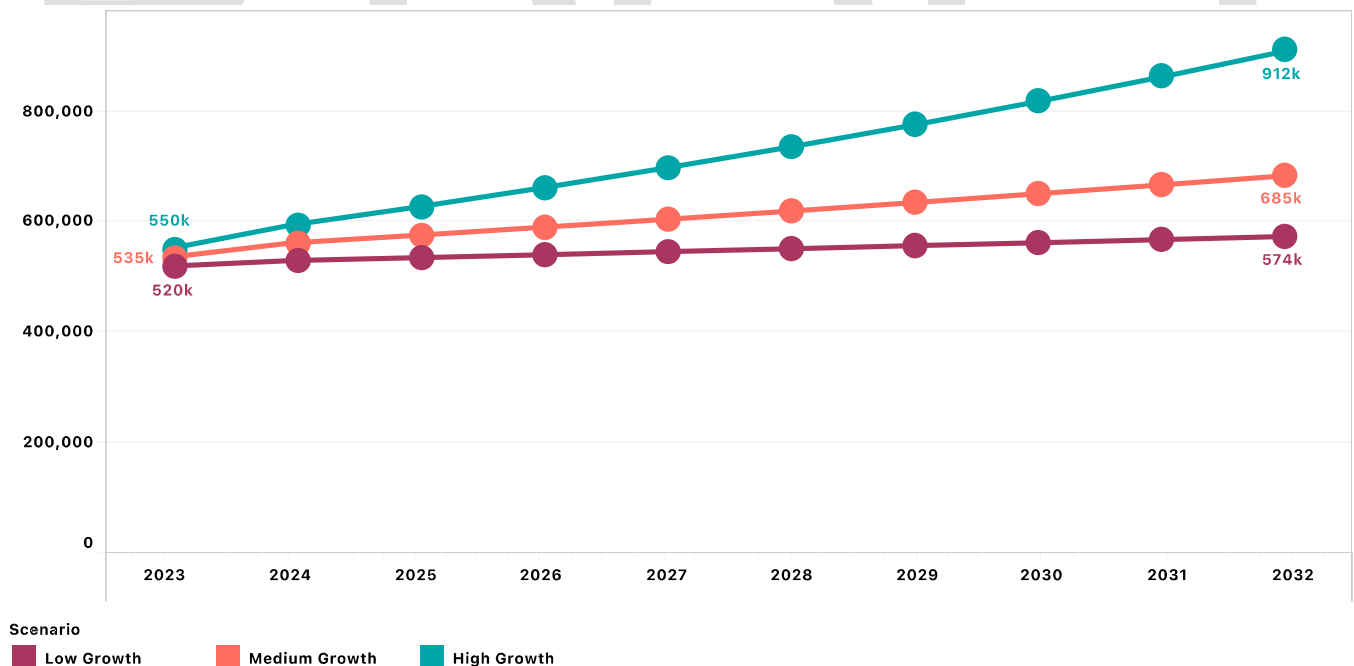
3.2. Visitor Forecasts

Figure 10 provides forecasts for visitor trips to Northern Grampians Shire over the period 2023 to 2032. The forecasts are based on three different scenarios being a low, medium, and high growth.

The data reflects the following.

- The low growth scenario reflects a much more conservative recovery from COVID-19 and ongoing growth, with 4% growth from 2022 – 2024 followed by a growth of 2% per annum for each year thereafter. It reflects far stronger interstate visitor growth by Victorians and outbound international travel as most countries open in 2022-2023.
 - The medium growth scenario reflects a more likely recovery scenario. Under this scenario, growth is modelled at 6% for the three years between 2022 and 2024, followed by a growth rate of 4% per annum for each year thereafter. This scenario assumes a number of the larger recommendations (including accommodation projects) are established over the next 8-year period and many existing facilities are refurbished. It also assumes a strong marketing campaign is maintained.
 - The high growth scenario sees a much stronger COVID-19 recovery of 10% per annum between 2022 and 2024, followed by a growth of 7% for each year thereafter. This scenario assumes a number of new attractions are established coupled with far faster development of new forms of accommodation. The high growth scenario is more aspirational and requires the faster activation of more new tourism products throughout the region.
- Greater promotion of the GPT and the introduction of more supporting industry and product development, are also key requirements to stimulate higher growth forecasts and improved visitor spending levels.
 - The achievement of the high growth forecasts for the Northern Grampians is heavily dependent on the ability of the wider Grampians region being able to deliver on a range of regional strategic initiatives and broader development projects. Whilst these wider regional projects and initiatives are the responsibility of GWMT, they will also benefit the Northern Grampians along with other LGAs.
 - The attainment of the high growth visitor forecasts is therefore dependent on the regional visitor economy uplift forecasted and the ability of Northern Grampians to leverage off this as well as just focus on Northern Grampians' own LGA-specific projects.
 - To achieve stronger visitation and related visitor spending for the future, Northern Grampians needs to work closely with GWMT and the other LGAs in the region, to ensure an integrated and coordinated approach to destination development and marketing occurs.

Figure 10: Visitor Forecasts, 2023 – 2032¹⁰



¹⁰ Derived by Stafford based on historic data from Tourism Research Australia (National and International Visitor Surveys) and COVID-19 recovery forecasts

3.3. Visitor Services

3.3.1. The Role of Visitor Servicing

The role of visitor servicing is to provide quality, relevant and useful information to enhance the visitor customer experience.

Importantly, the visitor servicing landscape does not only cover VICs, but rather, involves a broad ecosystem (see Figure 11) of tools and mediums to deliver to visitors across the entire trip planning cycle. And while there is no “one size fits all model”, visitor services do need to be forward-looking about the types of technologies influencing the travel cycle and aim to “touch” all points of this cycle.

Traditional visitor services (which consisted of primarily physical VICs) had a limited ability to influence all phases of the travel life cycle (they primarily impacted the booking phase), new technology has meant that visitor services have an expanded role to play, being able to assist visitors throughout the entire travel life cycle.

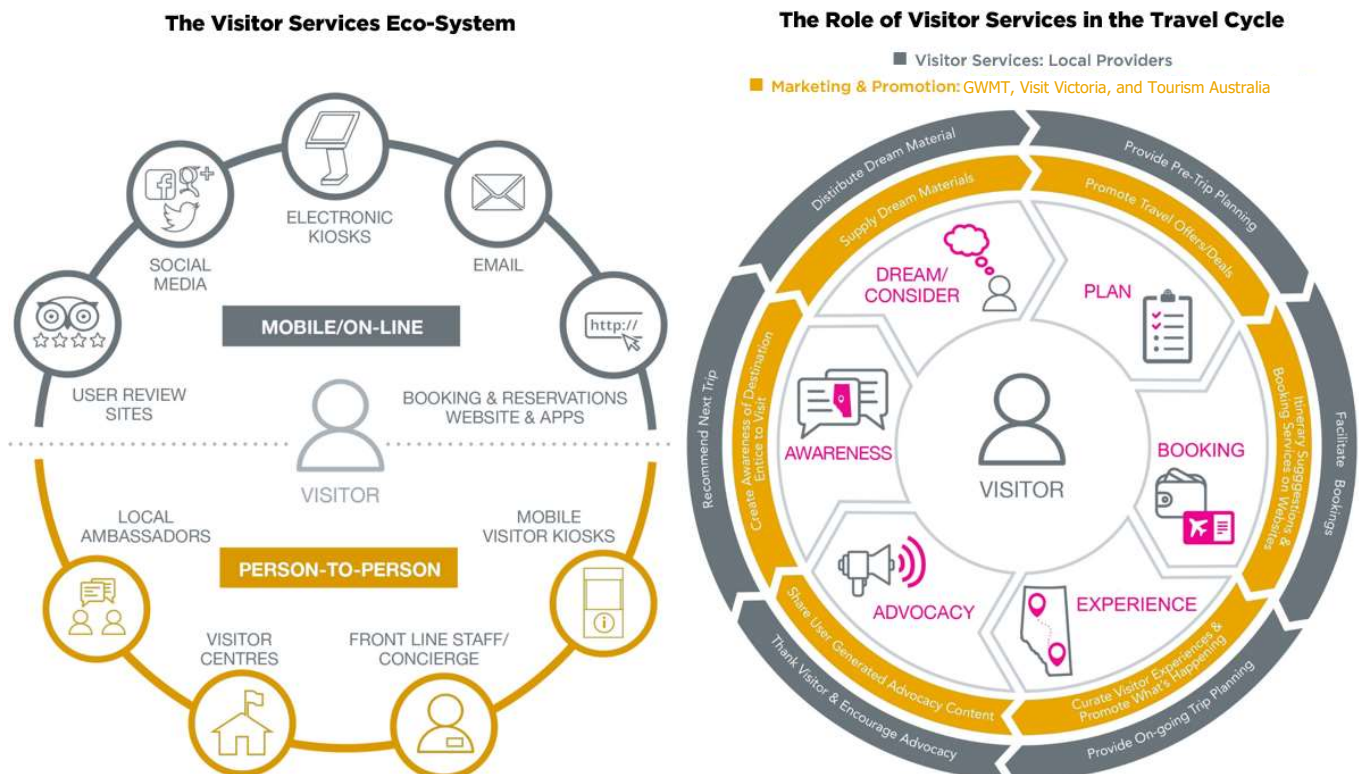
Figure 11 also demonstrates the travel cycle and how visitor services can be utilised to reach visitors. This involves a wide variety

of tools that enable the visitor experience to be managed from trip planning to trip follow-up.

Other points to note include:

- monitoring social media for negative comments and misinformation about the destination now forms an important part of visitor servicing: one bad comment outweighs many positive;
- while utilising multiple channels is key, there is a need to ensure that a consistent visitor experience is across all of them;
- visitors want transparency, which requires accurate and consistent information across all channels – including linking in and ensuring ATDW listings are up-to-date; and
- good visitor services providers strive to demonstrate leadership in working not only with local industry but also with regional tourism groups to ensure consistency, engagement and coordinated efforts.

Figure 11: The Visitor Services Eco-System and its Role in the Travel Cycle



3.3.2. The Role of VICs


3.3.2.1. Overview

While the visitor experience does not start nor does it stop with a VIC, they do form an integral part of the visitor servicing ecosystem. Additionally, they often service the broader community through the provision of meeting rooms, the sale of tickets for local services and performing/undertaking council services.

VICs are also an important contact point for the tourism industry - for operators, local tourism associations and regional tourism boards. In addition, they may also disseminate community information and are increasingly a significant distribution point for information in emergencies.

As per the 2018 Visitor Information Servicing Guidelines, a VIC also “provides a central location (in a fixed building/structure) for visitors to gain access to timely, accurate and impartial visitor information and advice. Visitor Information Services and Centres can help visitors electronically and in person to verify the research they have conducted online”.¹¹

3.3.2.2. Accreditation

The distinctive yellow “i” logo  indicates a VIC that is accredited through the Australian Tourism Accreditation Program (ATAP). The program is administered by the Victorian Tourism Industry Council (VTIC). Accredited VICs must meet a set of industry standards for professionalism, customer service, and regulatory compliance.

The benefits of the accreditation program include the following.¹²

- The Accreditation process assists Visitor Information Services teams and VICs in operating a more professional service and promotes continuous improvement.
- Eligibility to use the Visitor Information trademark. The blue and yellow italic “i” has been in the marketplace for some years now and has become a powerful and sought-after trademark.
- Opportunity to use VicRoads signage (including gateway and directional on major roads).
- Marketing of the Visitor Information brand and network to the travelling public and industry.
- Free listings in official publications such as the official visitors’ guides, touring maps and authorised digital platforms content.
- Access to training opportunities including professional development seminars and the annual Visitor Information Services Summit.
- Participation in the state Visitor Information Servicing Reference Group (as appointed) and the regional Visitor Information Servicing network group to share information and ideas with other Accredited centres and access to research, regular updates, information and advice.

- Access to benchmarking data and monthly reports.

There is a range of criteria that VICs need to comply with to achieve accreditation. The Guidelines have recently been updated to reflect the changing nature of visitor information services, including the ability to have a variety of optional service models (in addition to a physical VIC which acts as a hub) including satellite VICs, seasonal VICs, ancillary VICs, pop-up VICs, ambassadors, digital platforms and static and digital displays.

3.3.3. Visitor Servicing is Changing

The visitor servicing landscape has transformed. This transformation has been driven primarily by well-established advances in technology and digital tools, creating major changes in the way visitors interact with all stages of the travel life cycle (dreaming/considering, planning, booking, experiencing, advocacy, and awareness). Although traditional forms of visitor information servicing (e.g., bricks and mortar VICs, hard copy brochures and signage) have effectively only been able to primarily influence the booking and experiencing stages, the advent of new forms of visitor information servicing means destinations – with the right tools - can play a far more influential role.

There is an ongoing need, however, for face-to-face information validation as visitors are often looking for reassurance that what is online is timely and accurate.

Successful destinations put equal weight on all elements of the visitor experience from visitor servicing to product development, to enhanced service standards, to destination marketing. Within the visitor servicing landscape, these destinations do not just apply a single lens approach; rather, they apply multiple lenses and tools to optimise the delivery of the visitor servicing ecosystem.

These destinations have already moved to a much stronger digital-based visitor servicing approach and have investigated ways to enhance traditional forms of visitor servicing, via mobile VICs, unmanned smart touch screens and roving ambassador programs, just to name some options. These destinations are proactively engaging with visitors and influencing their choices across many channels.

Stafford has completed benchmarking of many visitor servicing models across Australia and globally. From this analysis, several key lessons learnt have been identified.

Figure 12 outlines the key success factors which others have applied and which could be considered for Northern Grampians and the broader Grampians region going forward. This is followed by Table 3 which provides a more detailed explanation.




¹¹ Page 2

¹² Visitor Information Services Guidelines, page 3

Figure 12: Comparative Analysis Lessons



Table 3: Comparative Analysis Lessons – Explained

1.	<p>A centralised approach allows for greater collaboration, economies of scale, brand management, coordination, and delivery of destination goals</p>	
<p>Those VICs that have moved from a stand-alone model to being part of a broader, centrally managed network appear to have not only benefited from greater economies of scale (by way of example through shared merchandising arrangements, training programs and digital strategies) but also were able to more closely align with regional branding and achieve a far more coordinated online presence.</p> <p>Currently, visitor information services (online and on-the-ground) across the region are fairly fragmented and undertaken in various different ways. There appears to be a lack of collaboration and coordination across the region. Visitors do not recognise local government boundaries and visitor information services need to recognise this.</p>		
2.	<p>Technology/digital solutions do not necessarily mean the cheapest option but do provide the opportunity for the greatest reach.</p>	
<p>There is often a false assumption that technology solutions for visitor services come at a lower cost than physical VICs. This is not always the case. The digital space is incredibly saturated and to stand out in the crowd, your physical presence must be of very high quality. This means beautifully designed and responsive websites, regular updates to websites and social media, high-quality imagery, and the integration of new technologies.</p> <p>However, digital visitor services provide the opportunity to reach visitors throughout all stages of the travel cycle. Physical VICs are often more constrained.</p>		
3.	<p>Content is king</p>	
<p>Good quality and unduplicated content is necessary for SEO, encouraging engagement, creating brand awareness, and increasing traffic (as well as a range of other benefits). However, this requires ongoing investment and should be undertaken by experienced professionals in the sector.</p> <p>User-generated content has also become a trusted source for travel information. There is an inherent trust in traveller-to-traveller advice. Websites such as TripAdvisor provide peer reviews for products and destinations without commercial interest. They are highly regarded and at times, feared by regional and state tourism bodies and industry when complaints are registered.</p> <p>Similarly, visitor services must provide visitors with suggestions specific to their interests and must be transparent about the quality of the experience that the visitor can expect. In the crowded online marketplace, visitor service providers must demonstrate they are a trusted source both online and in person.</p>		

4. Physical and digital visitor servicing needs to be carefully balanced



While there is much hype around digital and technology being the way of the future for visitor servicing, best practice research highlights that a model that integrates both of these appears to have a greater impact: it is not a case of one or the other.

Visitors who are relying on tourism websites may not be learning about local experiences and smaller attractions - the “hidden gems” (specialised retail stores, a hiking club, or a building with certain architecture) that visitor services providers can provide. Visitor services providers will need to be positioned as a trusted source for trip planning assistance.

For some destinations around the country, VICs have been closed for one reason or another and replaced with digital visitor services and touch screens etc. In these cases, the closure of VICs must be carefully transitioned and planned. The digital/tech solution must be available to visitors before the closure of any bricks and mortar VICs.

5. Visitor information needs to come to the visitor, not the other way around



Visitor services must move beyond the bricks-and-mortar VIC approach of delivery and proactively reach out to visitors using the method of delivery by which the visitor prefers to be engaged. This includes delivering visitor services through roving ambassadors, mobile VICs, information kiosks and touch screens, high-quality websites and booking platforms etc.

6. VICs can perform other services



In many regions, VICs play an important role not only for visitors but for locals as they are seen as central servicing hubs. Some VICs have leveraged this and now perform a multitude of services for locals including offering a range of council services to ratepayers (for example, animal registrations and rate payments etc.) as well as the provision of meeting rooms for locals. This not only increases utilisation of the VICs, particularly during mid-week periods where visitation for many VICs is lower, but it also assists in creating greater awareness of the VICs and the importance of the visitor economy for locals.

Some VICs have also become emergency centres during major inclement weather and other events because of their central location and their reach within the local community.

It is important, however, that if VICs do assume “dual roles” that additional budget is assigned for this, rather than being distributed via the tourism budget.

7. Volunteer training programs require ongoing investment



Although volunteers are a significant asset for any region, there is often a false perception that volunteer labour comes at no cost. The coordination, management, quality control and ongoing training of volunteers does, however, cost and is ongoing.

VICs with best-practice volunteer programs (such as the Moreton Bay VIC network in Queensland which has an award-winning volunteer team) attribute their success to several key factors including their regional approach to training across all their VICs; their volunteers' commitment to and participation in extensive customer service and professional development training; having a volunteer buddy system for new volunteers; developing their volunteer training program based off a customer service TAFE program; and having this program peer-reviewed by the QVIC association.

8. Location is critical and it must look good



Visitors now have many options for accessing information, whether it be in person or online. The quality of what is offered in both these realms is a strong reflection of the community's pride.

Many major destination VICs (and city VICs) have been redeveloped in recent years and are situated in highly appealing and edgy buildings, including revamped shipping containers and mobile kombi vans as well as internal fit-outs akin to an Apple store. Without this, many visitors will not come in.

Visitors have access to numerous travel resources via websites, mobile applications, online travel agents and social media. They want to access information quickly and conveniently, anytime and anywhere. As a result, many do not feel the need to seek out VICs unless they are conveniently located, are easy to park nearby and have opening hours that suit the visitor.



3.3.4. Existing Visitor Servicing in Northern Grampians Shire

Visitor servicing is but one avenue of change that Northern Grampians Shire could investigate to continue to sustainably grow its visitor economy and to achieve its regional tourism objectives.

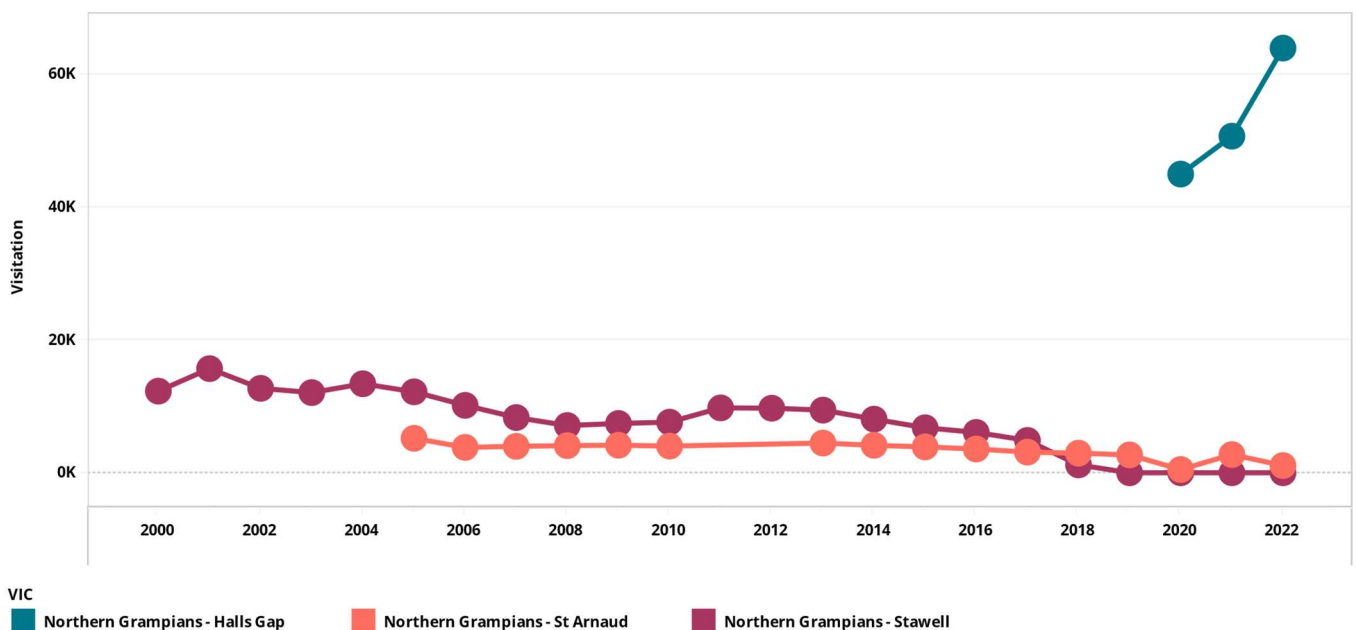
Figure 13 provides a snapshot of visitation into the Shire's VICs over the period 2000 – 2023. When reviewing this data, it is important to note the following.

- It is COVID-19 impacted with closures of the VIC being reflected in the years 2020 and 2021.
- Northern Grampians Shire only has recently acquired running the Halls Gap VIC so the data available is limited.
- Data was not available between 2012 and 2013 for St Arnaud VIC.

No financial data was made available to assess the net cost of delivering visitor information services in the Shire, however, as more and more visitors use the internet to access information and make bookings, there is a need to continue to evaluate whether the LGA's and broader region's current investment in visitor servicing is achieving the best return on investment and generating strong enough reach to a sufficiently broad visitor base.

To support a cohesive and well-integrated regional visitor information servicing approach, consideration should be given to a regional VIC review to maximise opportunities, improve digital connectivity especially, and to share cost efficiencies so the net cost of offering visitor information services per visitor can be reduced and to grow the number of visitors using visitor information centres and online services.

Figure 13: VIC Visitation (Calendar YE)¹³



¹³ Data provided by Council



Part 4: How Will We Get There?

4.1. Recommendations

4.1.1. Overview

A wide variety of recommendations have been identified through consultation, research, and analysis completed for this LAAP. These recommendations, listed in the “Initiatives” column, have been categorised according to whether they are Development Projects or Strategic Initiatives:

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

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

4.1.1.1. Timeframes

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

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

4.1.1.2. Responsibility

The stakeholder(s) listed under the “Key Stakeholders” column have been noted as the potential drivers of the initiative/action. This does not mean they are the funder of the recommendation or that they should be the only stakeholder involved in achieving that recommendation. The LAAP is produced for Council in partnership with these key stakeholders.

4.1.1.3. Cost Estimates

Estimated costs for the development and/or the completion of business cases/feasibility studies to progress projects have also been outlined. These are estimates only that need to be confirmed by more in-depth analysis. The estimated cost is the cost to council and is subject to Council’s long term financial planning process.

4.1.1.4. How recommendations were prioritised

4.1.1.4.1. Prioritising the Strategic Initiatives

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

4.1.1.4.2. Prioritising the Development Projects

To determine the priority Development Projects, each has been assessed against the weighted criteria outlined in Table 4. A weighted score has been used to reflect that some of the criteria have a stronger positive impact or a higher level of importance to each stakeholder than others.

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

The full project ranking matrices are included in Appendix 2 and Appendix 3.

Table 4: Recommendation ranking criteria

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

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

4.1.2. Theme 1: Nature, Recreation and Wellness

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

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

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

4.1.2.1. Priority Recommendations

The following are the priority recommendations under this theme. They have been prioritised using the detailed project ranking matrix explained in Section 4.1.1.4.

Grampians Rail Trail completion (connection from Stawell to Halls Gap): The Rail Trail Project will help disperse visitors to other parts of the NGSC region including Stawell. As understood, this project also potentially includes:

- The Halls Gap Zoo Link is the footpath/cycling trail to link Halls Gap to the Halls Gap Zoo. NGSC has completed a feasibility study on this project but Council still needs to complete a detailed design and planning study to enable it to make a decision on whether funding can be sought to deliver the project. This project is noted as important to create a walking-cycling dedicated connection from Halls Gap to Stawell, especially with the strong focus of Halls Gap as a major walking trail hub and the need for greater visitor dispersal. Stronger visitor dispersal will support greater visitor economic benefit spreading to other parts of the region with the potential to also encourage greater length of stay and higher visitor spend.
- The Heatherlie Trail links to Heatherlie Quarry and takes approximately 45 minutes to walk. It is a historical walk offering insight into traditional quarrying methods for stone cutting including construction of Parliament House in Melbourne and other notable buildings. The walk takes visitors past buildings and equipment used in mining operations and aims to extend the walking experiences which the region has focussed development on for visitor economy growth.

Grampians Getaway – GROW Development: This project includes the expansion of camping and caravan park Grampians Getaway to include a wellness spa and yoga retreat near Halls Gap. A planning permit for the development has been approved as of August 2023.

The Halls Gap development is already partially developed and occupied by existing tourist accommodation, Grampians Getaway, including a large man-made lagoon.

The new development, worth \$25 million, is proposed to provide short-term accommodation including 36 luxury suites and an associated wellness day spa including treatment rooms, yoga and gathering spaces. It also includes a swimming pool and gym and additional staff accommodation.¹⁴

The development will provide a higher level of accommodation to the provider's lower cost offering already available on site.¹⁵

Stawell Gift: Nearly 700 runners attended the Stawell Gift in 2023. With Council and the Stawell Gift Event Management Board's strong desire to grow spectators attending and economic uplift from the event. The event provides the chance to showcase Northern Grampians Shire and its various local products and brands. This project, therefore, aims to enhance the event by looking at options for increasing visitor length of stay in the region through adding supplementary products and experiences to encourage visitors to not only watch the race, but also to disperse to visit other parts of the region. This will lead to increased visitor spend in the region on accommodation, food and beverage and goods and services including guided tours and retail.

¹⁴ <https://www.theweeklyadvertiser.com.au/articles/green-light-for-northern-grampians-tourism-projects-in-great-western-and-halls-gap/?section=1045>

¹⁵ Ibid

Table 5: Theme 1 Action Plan

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
○	Grampians Rail Trail completion (connection from Stawell to Halls Gap) ☆	<ul style="list-style-type: none"> Advocate for the completion of the Grampians Rail Trail as per the Grampians Region Cycling Masterplan. Identify potential grant funding streams to fund the completion of the trail. 	\$500k	NGSC, PV, VicRoads	Medium - long term
	The Halls Gap Zoo Link	<ul style="list-style-type: none"> Complete the detailed design and costing for the Halls Gap Zoo Link If favourable result, apply for grant funding to implement development. 	\$500k		
	The Heatherlie Rail Trail	<ul style="list-style-type: none"> Investigate the project and conduct a feasibility study. If favourable result, apply for grant funding to implement development. 	TBC		
○	Grampians Getaway – GROW Development	<ul style="list-style-type: none"> Continue to support the operator/investor to activate the opportunity efficiently 	\$25m	NGSC, GWMT	Short-medium term
○	Kara Kara National Park project	<ul style="list-style-type: none"> Continue to work with PV to facilitate water management to the top dam (Teddington Reservoir). Continue to advocate for the completion of the project which includes upgrades to campsites and facilities. 	\$200K	PV, NGSC, Dja Dja Wurrung Clan	Medium term
○	Queen Mary Botanic Gardens heritage precinct	<ul style="list-style-type: none"> Prepare concept and design concept for the beautification and activation of Queen Mary Gardens. The plan may include additional alfresco seating, landscaping, public art, and wayfinding at the primary entry point from Melbourne via Sunraysia Highway to create a welcoming, first impression of St Arnaud. 	\$50k for the plan and \$500k for activation and marketing	NGSC	Medium term
○	Recreational fishing and competition	<ul style="list-style-type: none"> Consider delivery of a feasibility study for a recreational fishing competition in the region. 	\$65k	ARCC, HRCC, NGSC, SGSC, Local Fishing Clubs, GWMT	Long term
○	Stawell Gift	<ul style="list-style-type: none"> Work in partnership with the Stawell Gift Event Management Board to increase local economic impact of the Stawell Gift. Identify opportunities to build local support for the event. 	N/A	NGSC, SGEM	Short-medium term

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiative

4.1.3. Theme 2: First Peoples

The Grampians region has extensive First Peoples’ history, with Gariwerd, in particular, being home to the Djab Wurrung and Jardwardjali people for the past 20,000 years.¹⁶ The region is also home to 80% of all First Peoples’ rock art in Victoria.¹⁷

This theme recognises that First Peoples’ product offering must be “...led by Traditional Owners and First Peoples’ communities to learn from and celebrate this enduring connection is crucial.”¹⁸

4.1.3.1. Priority Recommendations

The following are the priority recommendations under this theme. They have been prioritised using the detailed project ranking matrix explained in Section 4.1.1.4.

Brambuk - The National Park and Cultural Centre upgrade¹⁹:

This project involves the upgrade of Brambuk’s buildings, the rejuvenation of indoor and garden spaces, the development of cultural programs for First Peoples and the creation of new visitor experiences.²⁰

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

The project also includes commissioning the development of outdoor art installations, which will be located between the Visitor Centre and Cultural Centre buildings.²¹ It will bring together the work of artists from the three Gariwerd Traditional Owner

communities into one space to share their connection with Gariwerd Country.

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

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

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

Table 6: Theme 2 Action Plan

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
○	First Peoples’ cultural tourism product development	<ul style="list-style-type: none"> Support the Aboriginal Land Councils (Barengi Gadjin Land Council, Gunditj Mirring Traditional Owners Aboriginal Corporation, Eastern Maar Aboriginal Corporation, Dja Dja Wurrung Clans Aboriginal Corporation) to facilitate and foster authentic and unique cultural experiences and share their cultural story with visitors when they are ready to do so. 		GWMT, BGLC, GMTO, EMAC, DDWCAC, ARCC, HRCC, NGSC, SGSC, RDV, VV	Medium – longer term
○	Brambuk: The National Park and Cultural Centre upgrade ☆	<ul style="list-style-type: none"> Maintain support the development of Brambuk. 		NGSC, PV, TOS	Short-medium term

¹⁶ <https://www.dceew.gov.au/parks-heritage/heritage/places/national/grampians#:~:text=Known%20as%20Gariwerd%20by%20local,Aboriginal%20art%20motifs%20in%20Victoria>

¹⁷ <https://www.visitgrampians.com.au/see-do/culture/indigenous-culture/aboriginal-rock-art-sites>

¹⁸ Ibid

¹⁹ Brambuk: the National Park and Cultural Centre, Barengi Gadjin Land Council, Eastern Maar, Gunditj Mirring Traditional Owners Aboriginal Corporations and Parks Victoria, page 4.

²⁰ The project is supported by the Victorian Government through the Department of Jobs, Precincts and Regions.

²¹ The project is supported by the Victorian Government through Creative Victoria.

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
◆	First Peoples' place names	<ul style="list-style-type: none"> Collaborate with TOs and Land Councils to advocate for more active use of First Peoples' names. 		RDV, PV, TOs, BGLC, GMTO, EMAC, DDWCAC, ARCC, HRCC, NGSC, SGSC	Short – medium term
◆	Industry training with First Peoples and Elders including a cultural induction for Licensed Tour Operators ☆	<ul style="list-style-type: none"> Encourage industry operators to participate in cultural awareness training (delivered by TOs, First People and/or other stakeholder). Discuss with TOs the potential to development a local cultural induction program for Licensed Tour Operators. 		RDV, GWMT, VV, TOs, BGLC, GMTO, EMAC, DDWCAC, NGSC	Short - long term

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiative

DRAFT



4.1.4. Theme 3: Food and Drink

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

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

4.1.4.1. Priority Recommendations

The following are the priority recommendations under this theme. They have been prioritised using the detailed project ranking matrix explained in Section 4.1.1.4.

Grampians wine discovery centre (showcase and attraction):

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

Many vineyards and winemakers nationwide indicate they are keen to explore tourism uses on-site but are challenged by issues

including insurance, finding sufficient staff and biosecurity issues. This is often the case for more boutique producers.

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

Table 7: Theme 3 Action Plan

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
○	Grampians wine cellars profiling	<ul style="list-style-type: none"> Work in partnership with GWMT to audit of all regional cellar doors Contribute toward the development of promotional collateral and an online marketing program 	\$50K	GWMT, Grampians Winemakers Inc, Wineries, DJSIR, RDV, NGSC	Short - medium term
○	Grampians Wine Discovery Centre (showcase and attraction) ☆	<ul style="list-style-type: none"> Investigate the opportunity to produce a feasibility study assessing the viability of developing a major wine discovery centre. 	\$30K	Grampians Winemakers Inc, Wineries, GWMT, RDV, NGSC	Medium - long term

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiative

4.1.5. Theme 4: Arts and Culture

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

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

4.1.5.1. Priority Recommendations

The following are the priority recommendations under this theme. They have been prioritised using the detailed project ranking matrix explained in Section 4.1.1.4.

Dark Matter Discovery Centre: The Dark Matter Discovery Centre was in GWMT's recent Investment Prospectus and would be a fantastic all-weather attraction for Stawell. Importantly, there is no similar form of attraction elsewhere in Australia making this discovery centre unique. A quality science focussed attraction will offer an exciting facility to attract not only the broad leisure market to the region, but also the education market with potential for primary and secondary school students.

WAMA - National Centre for Environmental Art: WAMA received \$6.75 million in State Government grant funding as part of the Regional Tourism Infrastructure Fund. The entire project is estimated at \$9.0 million and there is a need to continue to support and advocate for the development of the precinct. It will deliver Australia's first art and environment precinct with the centrepiece being a world-class art gallery dedicated to art inspired by the natural environment, surrounded by indigenous wildlife, native botanic gardens and bushlands. This will provide the Grampians with an additional all-weather visitor attraction.

Table 8: Theme 4 Action Plan

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
◆	Dark Matter Discovery Centre ☆	<ul style="list-style-type: none"> Continue to support the potential development of a Dark Matter Discovery Centre for Stawell which would create a unique, all-weather attraction for the region. 	\$20K	NGSC, SUPL	Medium term
◆	Underground physics lab promotion	<ul style="list-style-type: none"> Continue to support the ongoing development of the Stawell Underground Physics Laboratory and profile its achievements (with data collection noted as having begun in 2023). 	\$20k	NGSC	Short-medium term
○	WAMA - National Centre for Environmental Art	<ul style="list-style-type: none"> Profile the facility's development as it occurs to build awareness and excitement. 	\$0	NGSC, WAMA	Short - medium term
◆	UNESCO World Heritage status.	<ul style="list-style-type: none"> Support the Victoria's Goldfields to be given UNESCO World Heritage status. 	\$10K	Goldfields World Heritage Bid, Partner Councils, HV	Short - long term

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
○	St Arnaud railway station/silo art	<ul style="list-style-type: none"> Investigate a precinct starting point for the St Arnaud Mural Trail at the Raillery Hub. Develop a wayfinding Mural Trail to encourage dispersal through the town. Collaborate with St Arnaud's artistic community groups to develop a proposal for interpretive wayfinding. Investigate a wayfinding trail that communicates St Arnaud's heritage story and links to the Raillery Gallery and Silo Art Trail in addition to the heritage precinct circuit. 	\$80k	RDV, NGSC	Short-medium term
○	Story of gold fields and link to the current gold mine	<ul style="list-style-type: none"> Commission professional media providers to capture high-quality media of the gold fields and mining story in the LGA. Incorporate this media into destination marketing for the LGA. Develop self-guided gold field tours incorporating this media. 	\$150k	NGSC	Medium term
○	Napier Street, St Arnaud retail facades	<ul style="list-style-type: none"> Host a visioning workshop to gauge the will of current owners to participate in a restoration program and demonstrate the benefits of a restoration program. Identify grant funding streams to undertake a program of restoration for the facades on Napier Street. Commission a specialist to develop a program of restoration including a heritage architectural master plan. 	\$500k	NGSC, builder owners and private investors	Medium-long term

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiative



DIVATI

4.1.6. Theme 5: Regional Accommodation

The quality of accommodation throughout regional Victoria remains a challenge, with 68% of regional accommodation being budget or mid-scale.²² There are a number of gaps in the Grampians' accommodation offering. These gaps include the typology of properties on offer along with the size/scale of product offered. To continue to appeal to a contemporary visitor market and grow visitor yield, there is a need to stimulate investment into existing accommodation stock and to introduce new accommodation properties.

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

4.1.6.1. Priority Recommendations

The following are the priority recommendations under this theme. They have been prioritised using the detailed project ranking matrix explained in Section 4.1.1.4.

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

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

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

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

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

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

It is noted that due to the significant pent-up demand for worker's accommodation, rents in the region have risen significantly, offering developers and investors attractive returns on investment for longer-term rental periods, especially with guaranteed lease arrangements with local businesses.

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

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

²² STR August 2022

Table 9: Theme 5 Action Plan

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
○	4-star accommodation at Halls Gap ☆	<ul style="list-style-type: none"> Prepare feasibility and business case to identify opportunities and encourage operators and their investors. Prepare investment prospectus for sending to investors 	\$45.0m for development and \$65k for feasibility and business case	NGSC	Medium - long term
◆	Advocate for/encourage motel retrofitting	<ul style="list-style-type: none"> Host an annual workshop in each LGA with motel and accommodation operators to promote the benefits of accommodation retrofitting, demonstrating case studies of success and where this has led to improved ROI and demand 	\$45k	ARCC, HRCC, NGSC, SGSC, VV, RDV, GWMT	Short - medium term
◆	Designation of sites for worker accommodation and packaging of these to investors ☆	<ul style="list-style-type: none"> Work with Councils to identify potential sites that are suitable for marketing the development of worker accommodation. Develop a prospectus to take to worker accommodation investors. 	\$120k for site determination, planning study and investment prospectus	ARCC, HRCC, NGSC, SGSC, GWMT, RDV	Short - medium term
○	Great Western accommodation development (60 rooms) ☆	<ul style="list-style-type: none"> Support the existing developer/investor to achieve required planning approvals (where these meet Council requirements). Provide data for any planning and feasibility work required. 	\$20.0m	NGSC	Short - medium term
○	Glamping pods	<ul style="list-style-type: none"> Undertake a pre-feasibility study looking at the development of glamping pods in the region. 	\$6.5m	ARCC, HRCC, NGSC, SGSC, GWMT	Medium - long term
○	Heritage accommodation in St Arnaud	<ul style="list-style-type: none"> Undertake a site assessment to determine potential sites suitable for heritage accommodation in St Arnaud. Develop a top-line feasibility study. If feasible, prepare an investment prospectus to identify opportunities and encourage operators and their investors. 	\$40k for top-line feasibility study and site assessment	NGSC	Medium - long term

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiative

4.1.7. Theme 6: Identity, Marketing and Placemaking

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

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

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

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

4.1.7.1. Priority Recommendations

The following are the priority recommendations under this theme. They have been prioritised using the detailed project ranking matrix explained in Section 4.1.1.4.

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

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

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

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

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

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

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

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

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

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

For most councils, the majority of land is designated as rural, or zoned strictly for agricultural purposes. This effectively makes it

extremely difficult for landowners to introduce core tourism and ancillary development such as worker accommodation, eco-cabins, glamping, walking and cycling trails across farmland, farm gate agri-tourism experiences and farm produce experiences etc.

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

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

Table 10: Theme 6 Action Plan

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
◆	Advocate to streamline State Government planning process	<ul style="list-style-type: none"> ▪ Continue to collectively advocate to State Government planning regarding the need to streamline the planning process and the blockages that are occurring 	\$40k	GWMT, ARCC, HRCC, NGSC, SGSC, RDV, DJSIR	Short term
◆	Events toolkit for each LGA	<ul style="list-style-type: none"> ▪ Develop an events toolkit for each LGA to demonstrate that each is 'open' for events and to make event planning easier for event organisers. 	\$20k	GWMT, ARCC, HRCC, NGSC, SGSC	Short term-medium term
◆	Grampians (Gariwerd) National Park Private Investment Strategy	<ul style="list-style-type: none"> ▪ Develop a strategy via PV to identify and encourage different forms of private tourism investment to support the growth potential of GPT 	\$50k	PV, RDV, GWMT	Short term
◆	Grampians (Gariwerd) National Park Public and Private Investment Strategy to support regional dispersal and Central Corridor Experience Masterplan ☆	<ul style="list-style-type: none"> ▪ Develop a GPT central corridor experience masterplan that links private tourism products to public infrastructure so the GPT is integrated well into the visitor economy. 	\$150k	PV, GWMT, NGSC	Short – medium term
◆	Greater marketing and profiling of the GPT at a state and national level ☆	<ul style="list-style-type: none"> ▪ Advocate for greater marketing and profiling of the GPT at a state and national level ▪ Aim to secure funding to profile the GPT via inflight publications, in major tourism-traveller publications online, via relevant websites etc 	\$150k	PV, GWMT, VV	Short-medium term
◆	Greater tourism destination marketing campaign funding to encourage dispersal	<ul style="list-style-type: none"> ▪ Advocate for greater tourism Destination Marketing Campaign funding to encourage visitor dispersal ▪ Package up tours and products to illustrate regional dispersal options 	\$80k	GWMT, ARCC, HRCC, NGSC, SGSC, RDV	Short term

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
◆	Marketing to car clubs and associations (classic, vintage, veteran)	<ul style="list-style-type: none"> Develop a direct marketing campaign targeted at car clubs and associations profiling the region's drive trails and appropriate packages. 	\$50k	GWMT, NGSC, VV	Short-medium term
◆	Grampians culture passport ticket	<ul style="list-style-type: none"> Undertake top-line demand and cost assessment for a regional cultural passport ticket. If the concept is viable, host a workshop with all Councils and cultural facilities to gauge buy-in and interest and to promote the potential benefits. 	\$45k	GWMT, RDV	Medium - long term
◆	Regional visitor servicing strategy ☆	<ul style="list-style-type: none"> Undertake regional visitor servicing strategy to reassess visitor servicing needs and the various options for delivery. 	\$100k	ARCC, HRCC, NGSC, SGSC, GWMT	Short-medium term
◆	Review of LGA planning schemes ☆	<ul style="list-style-type: none"> Secure grant funding for reviews of LGA planning schemes to introduce tourism development on rural/agricultural land. 	\$100k	RDV, VPA, GWMT, ARCC, HRCC, NGSC, SGSC	Short - medium term
◆	Tourism awareness (value of the visitor economy) campaign for residents	<ul style="list-style-type: none"> Raise community awareness of the value and importance of the visitor economy as a mechanism to support community social licence, economic outcomes, and environmental and cultural benefits. 	\$40k	ARCC, HRCC, NGSC, SGSC, GWMT	Medium term
◆	Tourism investment marketing campaign ☆	<ul style="list-style-type: none"> Secure additional funding for a dedicated promotional campaign. 	\$120k	GWMT, RDV	Short term
◆	Tourism planning zones study	<ul style="list-style-type: none"> Undertake a study across the region to develop dedicated zones to support new tourism development. 	\$65k	GWMT, ARCC, HRCC, NGSC, SGSC, VPA, RDV	Short term

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiative



4.1.8. Theme 7: Industry Development and Collaboration

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

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

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

4.1.8.1. Priority Recommendations

The following are the priority recommendations under this theme. They have been prioritised using the detailed project ranking matrix explained in Section 4.1.1.4.

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

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

- programs focused on regenerative tourism practices, experience development and storytelling including our First Peoples' connection and stories, and across the key visitation drivers of Nature/GPT, Arts & Culture, Food & Drink, etc.;
- customer service upskilling and the development of both business capabilities and sustainable business practices;
- help in clustering and bundling experiences to make itineraries interesting and appealing;

- programs focused on social media and how to correctly utilise the various social media tools available (including what tool is best for specific types of marketing);
- grant writing support;
- help participating in additional programs to develop product offerings;
- providing the opportunity to network along the value chain to develop relationships with other suppliers.
- ATDW training to ensure the product is listed on the appropriate state and national tourism websites; and
- programs on understanding the difference between start-up, market-ready, accredited, and export-ready tourism products.

Development Approval Concierge for tourism businesses:

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

Table 11: Theme 7 Action Plan

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
◆	Development Approval Concierge for tourism businesses	<ul style="list-style-type: none"> Identify potential grant funding streams that could be applied to fund the Concierge position. Work with each Council to develop a role description for the position. Go to the market to advertise for the position. 	\$127k (over three years) for p/t staff member	GWMT, ARCC, HRCC, NGSC, SGSC, RDV	Short term
◆	Distribution of SpendMap data	<ul style="list-style-type: none"> Distribute SpendMap data to businesses on a bi-annual basis to show businesses consumer spending trends throughout each LGA (for those LGAs that subscribe). 	\$12k	ARCC, HRCC, NGSC, SGSC, GWMT	Short-medium term
◆	Expanding in-region tourism training opportunities for locals	<ul style="list-style-type: none"> Work with local providers to expand in-region training opportunities including building a business case for more in-region training to grow local skills to support a broader range of roles and support out-of-the-box employment. Undertake an annual skills needs survey in collaboration with registered training organisations (RTOs) to build a business case for more in-region training and gain an understanding of the current skills needs. 	\$20k	ARCC, HRCC, NGSC, SGSC, GWMT, RDV, DJSIR	Short-medium term
◆	F&B roster development	<ul style="list-style-type: none"> Work with F&B operators in each major town to get buy-in from those interested in signing up for an F&B roster system. Work with operators to develop the roster. Profile those operators who are involved in the roster system. 	\$20k	ARCC, HRCC, NGSC, SGSC, GWMT	Short - medium term
◆	Food & Wine Appreciation training program	<ul style="list-style-type: none"> Provide targeted training and support for F&B operators to upskill. 	\$40k	DJSIR, GWMT, ARCC, HRCC, NGSC, SGSC	Short - medium term
◆	Industry development training (customer service, product/experience development, social media, marketing, grant application writing) ☆	<ul style="list-style-type: none"> Work with DJSIR to develop a region-wide industry training program for tourism industry operators. Leverage the \$34m State and Federal investment in the Grampians Peaks Trail by implementing a targeted LTO training program for operators keen to commence operations on the trail or existing operators wanting to upskill further. 	\$100k	GWMT, DJSIR	Medium term
◆	Small Business Bus by Business Victoria profiling	<ul style="list-style-type: none"> Profile the Small Business Bus by Business Victoria and encourage industry operators to utilise the service. 	\$10k	DJSIR, GWMT, ARCC, HRCC, NGSC, SGSC	Medium term

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiative

4.1.9. Theme 8: Supporting Infrastructure

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

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

4.1.9.1. Priority Recommendations

The following are the priority recommendations under this theme. They have been prioritised using the detailed project ranking matrix explained in Section 4.1.1.4.

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

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

Heath Street upgrades & bridge: The Heath Street Bridge development and street upgrades are considered critical infrastructure for Halls Gap. This project is set to transform the visitor experience by redirecting traffic congestion away from the centre of the village as well as increasing capacity for walkers to safely access the trailhead from Halls Gap.

This project seeks to transition Heath Street from a 'back of house' area to a vibrant part of the Village Centre. In addition to the development of the new bridge over stoney creek, it includes formalisation of the road space, a new road connection to Grampians Road, expansion of car parking along the western street edge, as well as new pedestrian paths and planting of canopy vegetation.

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

Many global studies have found that the pedestrianisation of towns results in people staying longer and spending more money in towns which could result in significant economic benefits for Halls Gap.²³

²³ Car-free cities: are Australians ready to take back the streets? (<https://www.themandarin.com.au/104759-car-free-cities-are-australians-ready-to-takeback-the-streets/>)

Table 12: Theme 8 Action Plan

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
◆	Advocate for peak season public transport options around the Grampians ☆	<ul style="list-style-type: none"> Develop a peak season public transport options plan to take to the government as an advocacy piece. As a region, continue to advocate for improved peak season public transport options around the Grampians. 	\$150k	ARCC, HRCC, NGSC, SGSC, RDV, GWMT	Short term
○	Cycle trail link from Pomonal to Halls Gap	<ul style="list-style-type: none"> Develop a cycle trail link from Pomonal to Halls Gap. Identify any grant funding sources to fund the trail. 	\$185k	ARCC, NGSC	Medium – long term
◆	Electric charging stations around the Grampians	<ul style="list-style-type: none"> Identify investment required to support electric charging stations around the Grampians working in collaboration with Councils to ensure duplication of effort does not occur. 	\$1.2m	ARCC, HRCC, NGSC, SGSC, GWMT, RDV	Short-medium term
◆	Halls Gap worker transport	<ul style="list-style-type: none"> Explore options for the development of a minibus service to support workers in Halls Gap 	\$100k	NGSC	Short-medium term
◆	Halls Gap southern gateway	<ul style="list-style-type: none"> Investigate options to develop the previously proposed southern gateway at Halls Gap to provide an enhanced sense of arrival when entering Halls Gap. 	\$125k for gateway study and design work	NGSC	Medium – long term
○	Heath Street upgrades & bridge ☆	<ul style="list-style-type: none"> Continue to advocate for Heath Street upgrades and redevelopment 	\$25.0m	NGSC	Medium – long term
○	Lake Bellfield improvement	<ul style="list-style-type: none"> Investigate options to enhance the public's access to Lake Bellfield via soundless boat access (rowing or kayaking), providing a jetty and other recreational services. 	\$5.0m est. for improvements and \$45k for assessment study	NGSC	Medium – long term
○	MacKenzie Falls master plan	<ul style="list-style-type: none"> Commission the development of a master plan for MacKenzie Falls looking at car parking, signage, visitor flows etc. as well as dispersal once visitors leave MacKenzie Falls. 	\$7.8m for est. development and \$120k for masterplan	PV, Council and GWMT	Short-medium term
○	Pedestrian priority for Halls Gap (once Heath Street bridge is developed) ☆	<ul style="list-style-type: none"> Advocate for Halls Gap to go “car-less” once Heath Street bridge is developed. Develop advocacy material that supports this including case studies of where this has worked well elsewhere. 	\$60k for advocacy material and campaign	NGSC	Medium term

Type	Initiative	Action	Estimated Cost	Key Stakeholders	When
○	Public (paid) shuttle to key Grampians sites during peak periods	<ul style="list-style-type: none"> Identify potential operators who may have an interest in operating a public (paid) shuttle to key Grampians sites during peak periods (MacKenzie Falls, Wonderland Car Park, Silverband Falls, Reed Lookout). Undertake discussions with State Government regarding potential funding streams that could assist in subsidising the service. 	\$250k for peak period operator support for shuttle service	GWMT, ARCC, HRCC, NGSC, SGSC	Short-medium term
◆	Road improvements to VicRoads	<ul style="list-style-type: none"> Continue to advocate for road improvements to VicRoads. 	\$35k for advocacy	VicRoads, RDV, GWMT, ARCC, HRCC, NGSC, SGSC	Short term (ongoing)
◆	Signage audit & upgrades (entrance statements, directional & interpretive)	<ul style="list-style-type: none"> Commission a regional tourism signage audit that focuses on both direction and interpretive signage and provides recommendations for improvements. 	\$100k	GWMT, ARCC, HRCC, NGSC, SGSC	Medium term
◆	Staff shuttle (Halls Gap to Pomonal and Ararat)	<ul style="list-style-type: none"> Undertake an assessment (including liaison with staff and employers in Halls Gap and Pomonal) to understand demand potential. If demand exists, explore either a paid option or explore grant funding streams that could support the operation of the service. 	\$85k	NGSC, ARCC, GWMT	Medium term

○ Development Projects ◆ Strategic Initiatives ☆ Priority Project/initiative

Part 5: Appendices

DRAFT

Appendix 1 Full Survey Questions



Grampians Destination Management Plan & Local Area Action Plans

Have your say

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

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

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

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

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

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

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

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

- No
- Unsure
- Yes (please specify)

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

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

* 4. What best describes your business/organisation?

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Appendix 2 Full Matrix with Values

Table 13: Full matrix with values

Opportunity Name	Ability to encourage stronger international	Ability to encourage stronger interstate	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding f..	Alignment with State VEMP	Catalyst project to stimulate other inve..	Dispersal of Visitors	Employment (Operational) Potential	Estimated Visitation	Landowner	Level of Public Investment Required (as a % of total investm..	Private Sector Interest (as a % of total investment)	Regionally Significant, all-weather attraction..	Requireme nt for ongoing oper..	Short term to Activate	Uniqueness of Product
4-star accommodation at Halls Gap	Strong	Strong	Strong	Limited	High	Strong	Limited	21-50 FTE	Medium	Private	Low	High	None	None	No	Locally Unique
Brambuk upgrade	Strong	Medium	Limited	Strong	High	Medium	Strong	5-10 FTE	High	Parks Victoria	High	Very Low or None	High	Medium	Yes	State-wide Unique
Car-less Halls Gap (pedestrian prio..	Strong	Strong	Strong	Strong	Medium	Strong	Limited	n/a	High	Mixed	High	Very Low or None	None	Medium	No	Nationally Unique
Cycle trail link from Pomonal to Ha..	Limited	Limited	n/a	Medium	Low	Limited	Strong	n/a	Medium	Mixed	High	Very Low or None	None	Medium	No	Locally Unique
Grampians wine cellars profiling	None	None	Limited	None	High	Limited	Limited	Less than 5 FTE	Medium	Private	Low	High	None	None	No	Locally Unique
Grampians wine discovery centre (..	Strong	Medium	Medium	Limited	High	Limited	Strong	Less than 5 FTE	Medium	Council	High	High	Medium	None	No	Regionally Unique
Great Trail development	Limited	Limited	Medium	Limited	High	None	Medium	Less than 5 FTE	Medium	Other Govt.	High	Very Low or None	None	Medium	No	Locally Unique
Great Western accommodation d..	Limited	Medium	Limited	None	High	Medium	Medium	5-10 FTE	High	Private	Very Low or None	High	None	None	Yes	Locally Unique
Heath Street upgrades & bridge	None	None	n/a	Medium	None	Strong	Limited	n/a	n/a	Council	High	Very Low or None	None	None	No	None
Heritage accommodation in St Arn..	Medium	Medium	Limited	Limited	Low	Medium	Limited	11-20 FTE	Medium	Private	Very Low or None	High	None	Limited	No	None
Kara Kara National Park project	Limited	Medium	Limited	Medium	Medium	none	Strong	0	Medium	Parks Victoria	High	Very Low or None	None	High	No	Locally Unique
Lake Bellfield improvement	Limited	Limited	Limited	Limited	Medium	Limited	Medium	Less than 5 FTE	Medium	Other Govt.	High	Very Low or None	None	Medium	No	Locally Unique
Mackenzie Falls master plan	n/a	n/a	n/a	Medium	None	Medium	Limited	n/a	High	Parks Victoria	High	Very Low or None	None	Medium	Yes	n/a
Napier Street retail facades	None	None	Limited	Limited	None	None	None	n/a	None	Council	High	Low	None	Limited	No	None
Public (paid) shuttle to key Grampi..	Limited	Limited	Limited	Medium	Medium	Medium	Strong	Less than 5 FTE	Medium	Parks Victoria	High	Very Low or None	None	High	Yes	Regionally Unique
Queen Mary Botanic Gardens herit..	Limited	Limited	None	Limited	Low	Limited	Limited	n/a	Medium	Council	High	Very Low or None	None	Medium	No	Locally Unique
Railway station / silo art	Limited	Limited	Limited	Limited	Medium	None	Medium	n/a	Medium	Council	High	Very Low or None	None	Medium	No	Locally Unique
Reassessment of GPT 2-3-day walk..	Limited	Limited	Limited	Limited	High	Limited	Medium	n/a	Medium	Parks Victoria	High	Very Low or None	None	Medium	No	Locally Unique
Stawell Gift Race enhancements	None	Limited	Limited	Medium	None	Limited	Limited	5-10 FTE	Medium	Council	High	Very Low or None	None	Limited	Yes	Regionally Unique
Story of gold fields and link to curr..	None	None	Limited	Limited	None	None	Medium	Less than 5 FTE	Medium	Other Govt.	Medium	Medium	Low	Medium	No	Locally Unique
Updated entrance way & admin bu..	Limited	Limited	Limited	Limited	Low	Limited	Limited	Less than 5 FTE	Medium	Private	Very Low or None	High	None	None	Yes	Locally Unique
WAMA - National Centre for Enviro..	Medium	Limited	Strong	Medium	Medium	Limited	Limited	5-10 FTE	Medium	Private	High	Low	High	Limited	No	Regionally Unique

Appendix 3 Full Matrix with Scores

Table 14: Full matrix with scores (unweighted score/weighted score)

Opportunity Name	Strategic Investment Theme	LGA	Ability to encourage stronger international...	Ability to encourage stronger interstate...	Ability to Grow Visitor Yield Score	Ability to Secure Govt. Funding fo...	Alignment with State VEMP Score	Catalyst project to stimulate other inve...	Dispersal of Visitors Score	Employment (Operational) Pot..	Estimated Visitation Score	Landowner Score	Level of Public Investment Required (...)	Likelihood to be profiled by Visit Victor...	Private Sector Interest (as a % of tota...	Regionally Significant, all-weather attraction ..	Requirement for ongoing oper...	Short Term to Activate Score	Uniqueness of Product Score	Total
4-star accommodation at Halls Gap	Regional Accommodation	Northern Grampians	3 / 6	3 / 9	3 / 15	1 / 2	3 / 12	3 / 15	1 / 4	4 / 12	2 / 8	3 / 6	2 / 8	1 / 2	3 / 12	0 / 0	4 / 8	0 / 0	1 / 4	37 / 123
Brambuk upgrade	First Peoples	Northern Grampians	3 / 6	2 / 6	1 / 5	3 / 6	3 / 12	2 / 10	3 / 12	2 / 6	3 / 12	0 / 0	0 / 0	3 / 6	0 / 0	3 / 15	2 / 4	1 / 4	3 / 12	34 / 116
Car-less Halls Gap (pedestrian priority) once Heath Street bridge is developed	Supporting Infrastructure	Northern Grampians	3 / 6	3 / 9	3 / 15	3 / 6	2 / 8	3 / 15	1 / 4	1 / 3	3 / 12	1 / 2	0 / 0	3 / 6	0 / 0	0 / 0	2 / 4	0 / 0	4 / 16	32 / 106
Cycle trail link from Pomonal to Halls Gap	Supporting Infrastructure	Northern Grampians	1 / 2	1 / 3	1 / 5	2 / 4	1 / 4	1 / 5	3 / 12	1 / 3	2 / 8	1 / 2	0 / 0	1 / 2	0 / 0	0 / 0	2 / 4	0 / 0	1 / 4	18 / 58
Grampians wine cellars profiling	Food and Drink	Northern Grampians	0 / 0	0 / 0	1 / 5	0 / 0	3 / 12	1 / 5	1 / 4	1 / 3	2 / 8	3 / 6	2 / 8	1 / 2	3 / 12	0 / 0	4 / 8	0 / 0	1 / 4	23 / 77
Grampians wine discovery centre (showcase and attraction)	Food and Drink	Northern Grampians	3 / 6	2 / 6	2 / 10	1 / 2	3 / 12	1 / 5	3 / 12	1 / 3	2 / 8	2 / 4	0 / 0	2 / 4	3 / 12	2 / 10	4 / 8	0 / 0	2 / 8	33 / 110
Great Trail development	Nature and Recreation	Northern Grampians	1 / 2	1 / 3	2 / 10	1 / 2	3 / 12	0 / 0	2 / 8	1 / 3	2 / 8	1 / 2	0 / 0	1 / 2	0 / 0	0 / 0	2 / 4	0 / 0	1 / 4	18 / 60
Great Western accommodation development (60 rooms)	Regional Accommodation	Northern Grampians	1 / 2	2 / 6	1 / 5	0 / 0	3 / 12	2 / 10	2 / 8	2 / 6	3 / 12	3 / 6	3 / 12	2 / 4	3 / 12	0 / 0	4 / 8	1 / 4	1 / 4	33 / 111
Heath Street upgrades & bridge	Supporting Infrastructure	Northern Grampians	0 / 0	0 / 0	1 / 5	2 / 4	0 / 0	3 / 15	1 / 4	1 / 3	1 / 4	2 / 4	0 / 0	0 / 0	0 / 0	0 / 0	4 / 8	0 / 0	0 / 0	15 / 47
Heritage accommodation in St Arnaud	Regional Accommodation	Northern Grampians	2 / 4	2 / 6	1 / 5	1 / 2	1 / 4	2 / 10	1 / 4	3 / 9	2 / 8	3 / 6	3 / 12	0 / 0	3 / 12	0 / 0	3 / 6	0 / 0	0 / 0	27 / 88
Kara Kara National Park project	Nature and Recreation	Northern Grampians	1 / 2	2 / 6	1 / 5	1	2 / 8	0 / 0	3 / 12	0 / 0	2 / 8	0 / 0	0 / 0	1 / 2	0 / 0	0 / 0	1 / 2	0 / 0	1 / 4	14 / 49
Lake Bellfield improvement	Supporting Infrastructure	Northern Grampians	1 / 2	1 / 3	1 / 5	1 / 2	2 / 8	1 / 5	2 / 8	1 / 3	2 / 8	1 / 2	0 / 0	1 / 2	0 / 0	0 / 0	2 / 4	0 / 0	1 / 4	17 / 56
Mackenzie Falls master plan	Supporting Infrastructure	Northern Grampians	1 / 2	1 / 3	1 / 5	2 / 4	0 / 0	2 / 10	1 / 4	1 / 3	3 / 12	0 / 0	0 / 0	1 / 2	0 / 0	0 / 0	2 / 4	1 / 4	1 / 4	17 / 57
Napier Street retail facades	Identity, Marketing and Placemaking	Northern Grampians	0 / 0	0 / 0	1 / 5	1 / 2	0 / 0	0 / 0	0 / 0	1 / 3	0 / 0	2 / 4	0 / 0	0 / 0	1 / 4	0 / 0	3 / 6	0 / 0	0 / 0	9 / 24
Public (paid) shuttle to key Grampians sites during peak periods	Supporting Infrastructure	Northern Grampians	1 / 2	1 / 3	1 / 5	2 / 4	2 / 8	2 / 10	3 / 12	1 / 3	2 / 8	0 / 0	0 / 0	2 / 4	0 / 0	0 / 0	1 / 2	1 / 4	2 / 8	21 / 73
Queen Mary Botanic Gardens heritage precinct	Nature and Recreation	Northern Grampians	1 / 2	1 / 3	0 / 0	1 / 2	1 / 4	1 / 5	1 / 4	1 / 3	2 / 8	2 / 4	0 / 0	1 / 2	0 / 0	0 / 0	2 / 4	0 / 0	1 / 4	15 / 45
Railway station / silo art	Arts and Culture	Northern Grampians	1 / 2	1 / 3	1 / 5	1 / 2	2 / 8	0 / 0	2 / 8	1 / 3	2 / 8	2 / 4	0 / 0	2 / 4	0 / 0	0 / 0	2 / 4	0 / 0	1 / 4	18 / 55
Reassessment of GPT 2 3-day walking treks from Dunkeld	Nature and Recreation	Northern Grampians	1 / 2	1 / 3	1 / 5	1 / 2	3 / 12	1 / 5	2 / 8	1 / 3	2 / 8	0 / 0	0 / 0	0 / 0	0 / 0	0 / 0	2 / 4	0 / 0	1 / 4	16 / 56
Stawell Gift Race enhancements	Nature and Recreation	Northern Grampians	0 / 0	1 / 3	1 / 5	2 / 4	0 / 0	1 / 5	1 / 4	2 / 6	2 / 8	2 / 4	0 / 0	1 / 2	0 / 0	0 / 0	3 / 6	1 / 4	2 / 8	19 / 59
Story of gold fields and link to current gold mine	Arts and Culture	Northern Grampians	0 / 0	0 / 0	1 / 5	1 / 2	0 / 0	0 / 0	2 / 8	1 / 3	2 / 8	1 / 2	1 / 4	1 / 2	2 / 8	1 / 5	2 / 4	0 / 0	1 / 4	16 / 55
Updated entrance way & admin building for Halls Gap Zo	Nature and Recreation	Northern Grampians	1 / 2	1 / 3	1 / 5	1 / 2	1 / 4	1 / 5	1 / 4	1 / 3	2 / 8	3 / 6	3 / 12	2 / 4	3 / 12	0 / 0	4 / 8	1 / 4	1 / 4	27 / 86
WAMA - National Centre for Environmental Art	Arts and Culture	Northern Grampians	2 / 4	1 / 3	3 / 15	2 / 4	2 / 8	1 / 5	1 / 4	2 / 6	2 / 8	3 / 6	0 / 0	3 / 6	1 / 4	3 / 15	3 / 6	0 / 0	2 / 8	31 / 102



Copyright © A.Stafford & Associates PTY LTD

All rights reserved. No material may be reproduced without prior permission. While we have tried to ensure the accuracy of the information in this publication, Stafford Strategy accepts no responsibility or liability for any errors, omissions or resultant consequences including any loss or damage arising from relying upon information in this publication.

staffordstrategy.com.au ACN 079 055 100 ABN 34 565120 454

SYDNEY OFFICE

A 3.02 POST 46a MacLeay Street, Potts Point NSW 2011, Australia
E sydney@staffordstrategy.com.au
P +61 2 9331 6222

MELBOURNE OFFICE

A 36 Cobden Street North Melbourne VIC 3051, Australia
E melbourne@staffordstrategy.com.au
P +61 416 200 458

BRISBANE OFFICE

A PO BOX 265 Sandgate QLD 4017, Australia
E brisbane@staffordstrategy.com.au
P +61 417 721 342

WELLINGTON OFFICE

A Level 1, 2 Broderick Road, Johnsonville 6037, Wellington, NZ
E wellington@staffordstrategy.co.nz
P +64 21 337 377

