Southern Grampians Shire Local Area Action Plan

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

Date of last modification: 9/11/23

Copyright © A.Stafford & Associates PTY LTD

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

Contents

List of Figures

List of Tables

Acknowledgement of Country

Grampians Tourism acknowledges the traditional owners, Djab Wurrung, Jardwadjali and neighbouring First Peoples, who are the traditional custodians of the area where friends and family visit to enjoy everything the Grampians region has to see and do. We respect their history, culture, and Elders, past and present, and their continuous connection to Country. Southern Grampians Shire Council acknowledges that our Shire is on the traditional lands of the Gunditjmara, Djab Wurrung, Jardwadjali and Buandig people. We recognise the important ongoing role that Aboriginal and Torres Strait Islander people have in our community and pay our respects to their Elders, past, present and emerging.

Abbreviations & Definitions

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

STAFFORD STRATEGY

Part 1:   Executive Summary

1.1. Overview

Southern Grampians Shire is recognised for its rural setting, picturesque natural beauty, high-quality food experiences and captivating array of attractions and experiences.

The Destination Management Plan

Southern Grampians Shire Council and Grampians Tourism (GT) have engaged Stafford Strategy to prepare this Local Area Action Plan (LAAP) to assist Southern Grampians Shire Council, industry, and community to strengthen Southern 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 Tourism and the four member councils of the Grampians region including Southern Grampians Shire Council, Horsham Rural City Council, Northern Grampians Shire Council and Ararat Rural City Council.

Image credit: 3 Peaks Festival, Visit Greater Hamilton

Southern Grampians Shire

Southern Grampians Shire encompasses an area of just under 6,200 square kilometres and is situated approximately 3 hours 30 minutes (310 kilometres) west of Melbourne. As of 2022, the LGA had a population of 16,374 residents.[1]

The LGA is strategically situated as the gateway to the Grampians region, the broader Southern Wimmera Mallee region from the Great Ocean Road region (with many visitors entering Hamilton via Warrnambool and Port Fairy) as well as the Limestone Coast region which is located in south east South Australia and which immediately adjoins the continental coastline and the Victorian border.

In 2022, the Southern Grampians Shire attracted 370,000 visitors, more than half of which were domestic day visitors (61%).

The Experience

Southern Grampians Shire offers a diverse destination experience, with a stunning natural environment, rich cultural heritage, high-quality dining experiences, a boutique shopping experience, thriving regional sporting events and a vibrant arts scene.

Dunkeld, situated in the east of the Shire, is a key visitor destination and is located at the foot of the Grampians mountain range. The town boasts a picturesque setting, surrounded by majestic peaks, rolling hills, and verdant countryside. It serves as an entry point to the renowned Grampians (Gariwerd) National Park and as the southern gateway to the Grampians Peaks Trail. Dunkeld is also renowned for its culinary offerings, that showcase the region's fresh produce and local flavours.

Hamilton, the Shire's primary hub, is a vibrant regional city that has a rich historical heritage and a strong agricultural sector and a growing healthcare and education sector. The town offers a variety of cultural and heritage experiences, delivers a variety of diverse events and its renowned Hamilton Art Gallery is currently undergoing major redevelopment.

While the Shire does include the spectacular Grampians (Gariwerd) National Park, it is also home to a plethora of other stunning natural attractions and visitor drawcards including (but not limited to) Wannon Falls and Nigretta Falls, Byaduk Caves, Black Range State Park, Rocklands Reservoir, Yatmerone Wildlife Reserve and many more.

To further enhance and grow Southern Grampians Shire's visitor economy, opportunities include investigating a greater diversity of accommodation (typology and scale), cultural product development, food and drink experiences and built visitor-ready, bookable attractions.

[1] https://profile.id.com.au/southern-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 Southern Grampians Shire going forward.

Figure 1: Strategic Framework

Vision — **Southern Grampians Shire will be recognised as the region's food and arts hub complemented by its history and heritage profile and supported by growth in nature-based and events tourism, and its strategic location as the major access point to many surrounding regions.**

Strategic Objectives

1. Facilitate investment in the visitor economy that positions the Southern Grampians as an overnight hub for leisure and business along with major sporting and cultural events.
2. Support First Nations-led product development and delivery of tourism experiences especially around Dunkeld and Cavendish.
3. Achieve sustainable visitation patterns by growing visitor dispersal and off-peak visitation to support business sustainability and product development in key nodes such as Dunkeld, Cavendish etc.
4. Increase visitor yield by growing visitor dwell time and growing overnight visitation throughout the LGA.
5. Generate investment in supporting infrastructure that will enable visitor economy growth through improvements in road quality, potable water and sewage systems, wifi and phone connectivity etc.
6. Support a cohesive, integrated, and supported industry and community where tourism benefits are shared throughout the LGA with greater opportunities for new business ventures for locals.

Targets

The following performance targets have been identified for the Southern Grampians Shire.

370,000 to 444,000
20% Growth
In overnight visitors to Southern Grampians Shire between 2022 and 2030.

$39m to $51m
30% Increase
In visitor expenditure in Southern Grampians Shire between 2022 and 2030.

2.6 nights to 3.1 nights
20% Growth
In the average length of stay in Southern Grampians Shire between 2022 and 2030.

Themes

Key themes to guide future investment in Southern Grampians Shire have been identified. These have been selected in response to strategic considerations and objectives for tourism development and to align with the broader State VEMP and the Grampians DMP.

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

1.3. 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 Southern Grampians Shire and/or are considered important building blocks for the sustainability of Southern Grampians Shire as a visitor destination. Other recommendations have been identified in Section 4.1.

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. Ensure Southern Grampians water-based assets are prominently featured in marketing programs.	▪ Agridome showcase attraction ⭕ ▪ Dunkeld geothermal bathing experience ⭐ ⭕ ▪ Dunkeld nature playground ⭕ ▪ Hamilton Botanic Garden playspace profiling ⭕ ▪ Implementation of the Volcanic Trail Masterplan (including upgrade of Penshurst Volcanoes Discovery Centre) ⭕ ▪ Multi-use trails across SCSC ⭕ ▪ Reassessment of GPT 2-3-day walking treks from Dunkeld ⭕ ▪ Recreational fishing and competition ⭕ ▪ Develop strategic partnerships with state and federal stakeholders to leverage the positioning of Rocklands as a Victorian destination of significance ⭕
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.	▪ 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 ⭐ ◆ ▪ Strengthen the emerging opportunities with Budj Bim that enables an understanding of the connection of the SG volcanic experience to Budj Bim ◆
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.	▪ Creation of a regional producer's trail ◆ ▪ Secure strong relationships and active participation with state and federal advocacy bodies including Great South Coast Food & Fibre Network ◆ ▪ Support Southern Grampians growers and makers to pursue collaborative opportunities with Great South Coast and Limestone Coast industries ◆
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.	▪ Ansett Museum feasibility and master plan ◆ ▪ Grampians culture passport ticket ◆ ▪ Hamilton Gallery revitalisation ⭐ ⭕ ▪ Hamilton gardens weekends (public and private) ⭕
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.	▪ Advocate for/encourage motel retrofitting ◆ ▪ Designation of sites for worker accommodation and packaging of these to investors ⭐ ◆ ▪ Dunkeld luxury units ⭐ ⭕ ▪ Hamilton CBD branded accommodation (60+ rooms) ⭐ ⭕

⭕ Development Projects   ◆ Strategic Initiatives   ⭐ Priority Project/initiative

Strategic Investment Theme	Detail	Recommendations
6 **Identity, Marketing and Placemaking**	Continue to grow awareness of the Grampians brand to ensure the Southern Grampians is well-recognised and known as a compelling visitor destination	▪ Advocate to streamline State Government planning process ◆ ▪ Destination branding for LGAs in partnership with GT ◆ ▪ Events toolkit for each LGA ◆ ▪ Hamilton Botanic Gardens profiling ◆ ▪ Promotional campaign focusing on non-Grampians National Park assets ◆ ▪ Regional visitor servicing strategy ⭐ ◆ ▪ Review of LGA planning schemes ⭐ ◆ ▪ Strong profiling of Grampians Peaks Trail hub improvements (southern and two-way access) ◆ ▪ Tourism awareness (value of the visitor economy) campaign for industry and residents ◆ ▪ Tourism investment marketing campaign ⭐ ◆ ▪ Tourism planning zones study ◆
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.	▪ 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 ◆ ▪ Southern Grampians local tourism group ◆ ▪ Build relationships with key neighbouring Great Ocean Road and Limestone Coast industry and Local Governments ◆
8 **Supporting Infrastructure**	Supporting visitor economy growth by advocating for investment into infrastructure, transport connections and visitor services.	▪ Southern Joined ▪ Advocacy for peak season public transport options around the Grampians ⭐ ◆ ▪ Dunkeld, Balmoral and Cavendish waste management ⭕ ▪ Electric charging stations around the Grampians ◆ ▪ Hamilton as a hub for caravans/RVs (RV parking, promotional campaigns etc.) ◆ ▪ Public toilet facilities at Dunkeld Arboretum ⭕ ▪ Road improvements to VicRoads ◆ ▪ Lake Hamilton rowing course expansion ◆ ▪ Signage audit & upgrades (directional & interpretive) ◆ ▪ Improved all year road access to Rocklands ◆

⭕ **Development Projects** ◆ **Strategic Initiatives** ⭐ **Priority Project/initiative**

Part 2: Where Are We Now?

2.1. Introduction

Southern Grampians Shire Council (Council) and Grampians Tourism (GT) have developed this Local Area Action Plan (LAAP) to set out the vision and aspirations for the visitor economy for Southern 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 Southern 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 Southern 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 Southern Grampians Shire

Southern Grampians Shire is a local government area (LGA) located in the southwestern part of the Grampians region in Victoria. It covers an area of approximately 5,918 square kilometres and encompasses several towns, rural areas, and natural attractions. The shire is named after the Grampians Mountain ranges, which are a prominent feature of the region.

The Shire encompasses several towns and settlements within its boundaries. Some of the main towns in Southern Grampians Shire include:

- Hamilton: Hamilton is the major town and administrative centre of the Southern Grampians Shire. It is a vibrant regional hub that offers a range of services, amenities, and facilities. Hamilton features a bustling main street, shopping precincts, restaurants, cafes, healthcare services, educational institutions, and cultural attractions.
- Dunkeld: Dunkeld is a picturesque town located at the southern edge of the Grampians (Gariwerd) National Park. The town is the entrance and exit point of the Grampians Peaks Trail. The township offers stunning views of the surrounding landscapes, walking tracks and a culinary experience sourced from the expansive chef's garden through to the region's best sourdough. The proud vibrant community is intrinsically linked to many visitor experiences via museums, galleries, parks and gardens and events including the renowned Dunkeld Cup.
- Penshurst: Penshurst, located at the foot of Mount Rouse is a charming small town known for its historic buildings, and visitor attractions including the Volcanoes Discovery Centre, Botanic Gardens and Yatmerone wetland reserve. The town offers amenities such as a supermarket, cafes, a pub, and racecourse. Ideally located on the Great Southern Touring Route, Penshurst continues to evolve as a destination to discover.
- Balmoral: Balmoral is a rural town, nestled amongst rolling hills on the Glenelg River. l. Serving as a -centre for the surrounding agricultural community, Balmoral offers amenities including a general store, hotel, and various sporting facilities. It is a vital node for nearby Rocklands Reservoir, Victoria's second largest inland waterway.
- Coleraine: Coleraine is a historic town, with a rich agricultural heritage known for its historic buildings, including the Coleraine Courthouse and Railway Station. The town offers amenities such as shops, cafes, extensive sporting facilities including a football oval, racecourse and golf course.
- Tarrington: Tarrington is a small village located 9 km east of Hamilton. The town has a large Lutheran Church and offers amenities that service its small population. It is also home to wineries and cellar doors of the Henty Wine region.

- Glenthompson: Glenthompson is situated on the Glenelg Highway close to the southern part of the Grampians (Gariwerd) National Park. The town offers a small range of amenities and services and also features a tall brickworks chimney, which was the town's main industry for a period of time.
- Byaduk: Byaduk is situated in the southern part of the Shire and was settled in the early 1860s. Its name comes from an Aboriginal word which means "stone tomahawk". From Byaduk, visitors can access the Byaduk Caves as well as see extensive views of the lava flow at Harmans Valley and the tumuli lava blisters off Old Crushers Road.
- Cavendish: Cavendish is a small town known for its beautiful countryside, historic buildings, and proximity to natural attractions such as the Nigretta Falls and the Grampians (Gariwerd) National Park. Cavendish also functions as the service centre for Rocklands Reservoir.

The economy of the Southern Grampians Shire is diverse and primarily driven by agriculture, tourism, retail, and services. The region benefits from its natural resources, fertile agricultural land, and the attractiveness of the Grampians (Gariwerd) National Park, which contributes to its economic development. Some of the key sectors of the Shire's economy include the following.

- Agriculture: Agriculture plays a vital role in the economy of the Southern Grampians Shire. The region is known for its grazing, sheep and cattle farming, cropping, and horticulture industries. Farmers produce a range of commodities, including wool, beef, lamb, and cropping. Agriculture contributes to employment, export income, and the overall economic sustainability of the region.
- Tourism: The Southern Grampians Shire benefits from its proximity to the Grampians (Gariwerd) National Park, the Great Ocean Road, and the Limestone Coast of South Australia. These Iconic locations attract significant numbers of tourists each year that traverse throughout the Southern Grampians. Visitors come to explore these natural attractions, which significantly benefit tourism-related businesses including accommodation providers, restaurants, cafes, tour operators, and retail shops, supporting local employment and economic growth.
- Retail and Services: The major town of Hamilton serves as a regional centre and provides a range of retail and service industries. It has shopping precincts, supermarkets, specialty stores, healthcare services, educational institutions, and professional services. These sectors contribute to employment opportunities and the provision of essential services for both residents and visitors.
- Manufacturing and Construction: The Southern Grampians Shire has a small but significant manufacturing sector. It includes food processing, timber products, and metal fabrication industries. Construction activities also contribute to the local economy, with ongoing infrastructure projects and building developments supporting employment and economic activity.
- Arts and Culture: The region has a growing arts and culture sector, with local artists, artisans, and creative businesses contributing to the economy. Galleries, studios, and cultural events showcase the talents and creativity of the community, attracting visitors and supporting the local economy.
- Education and Health: The Southern Grampians Shire has educational institutions, including primary and secondary schools, providing employment opportunities in the education sector. Additionally, healthcare services, such as hospitals, medical centres, and aged care facilities, contribute to the local economy and support the well-being of the community.

The Southern Grampians region is recognised for its stunning natural beauty, diverse landscapes, and outdoor recreational opportunities. Some of the highlights and attractions in the Southern Grampians Shire:

- Grampians (Gariwerd) National Park: A significant part of the Grampians (Gariwerd) National Park is located within the Southern Grampians Shire. The park features majestic mountain ranges, breathtaking lookouts, hiking trails, waterfalls, and a rich array of flora and fauna. The start or finish to the Grampians Peaks Trail is strategically located in the Southern Grampians
- Mount Sturgeon and Mount Abrupt: These iconic peaks provide opportunities for bushwalking and climbing, offering panoramic views of the surrounding landscapes.
- Byaduk Caves: The Byaduk Caves are a unique geological attraction in the Southern Grampians Shire. These ancient lava caves were formed by volcanic activity and can be explored with proper guidance.
- Hamilton Botanic Gardens: Hamilton Botanic Gardens is a highly regarded William Guilfoyle designed amenity located in the heart of the town. It features a wide variety of plants, walking paths, picnic areas, bird aviary and a picturesque lake.
- Wine and Food: The region is home to the Henty Region's vineyards and wineries, where visitors can indulge in boutique wine tasting and cellar door experiences. The Southern Grampians Shire also boasts a range of paddock to plate growers and producers where local produce, including beef and lamb, attract national and international attention.

Figure 2: Scope of the LAAP
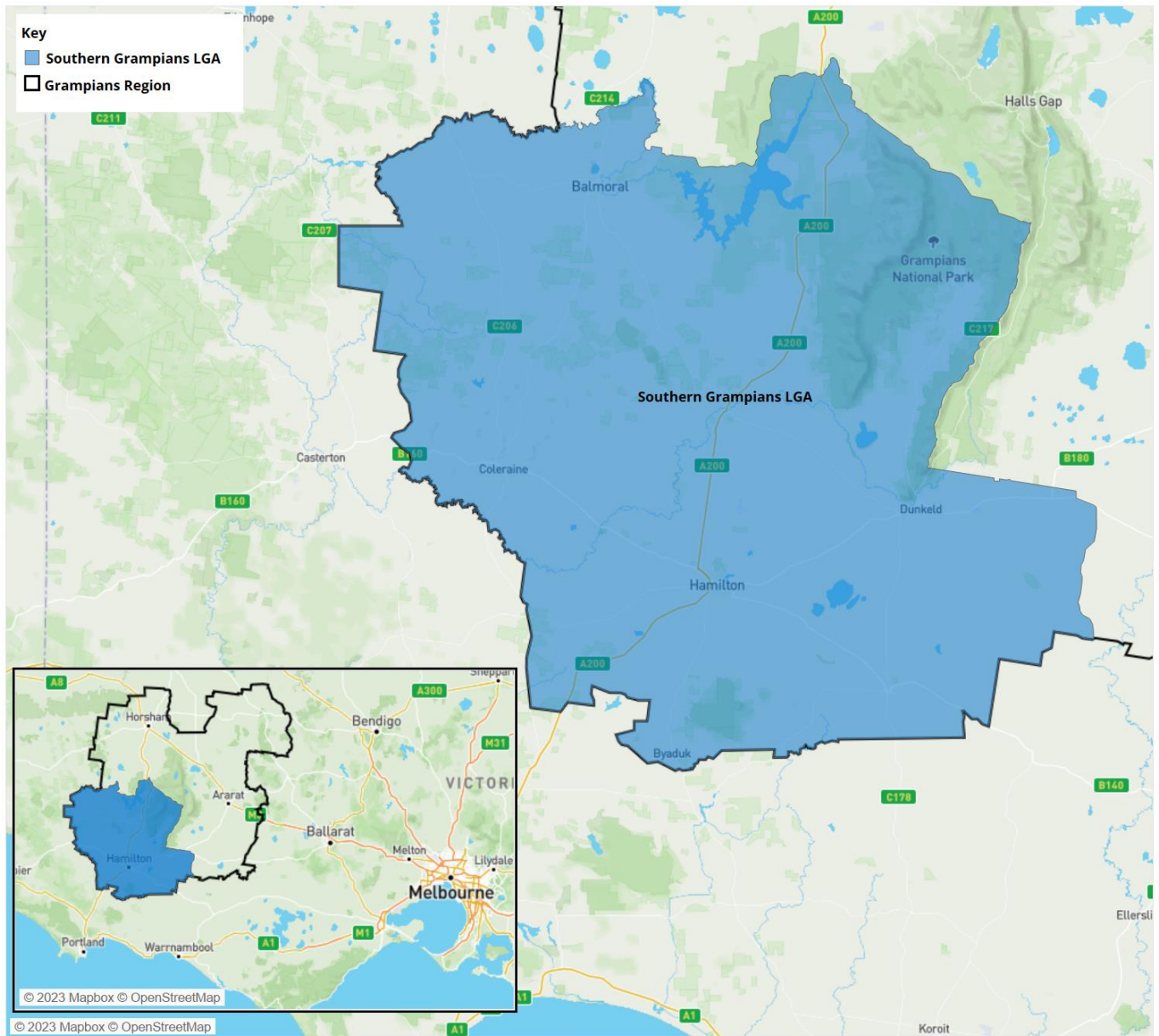
2.2. Visitation to Southern Grampians Shire

2.2.1. Visitor Economy Snapshot

Figure 3: Visitor Economy Snapshot 2022 (September YE)[2]

370,000
Trips in 2022
61% domestic day trip
39% domestic overnight
0.1% international overnight

344,000
Nights in 2022
99.6% domestic overnight
0.4% international overnight

$39 m
Spend in 2022
37% domestic day trip
63% domestic overnight
0.2% international overnight

2.6 nights
Average Length of Stay
2.4 nights - domestic overnight
3.0 nights - international overnight

Figure 4: Total Visitation, 2013–2022[3]

Total Visitation to the Southern Grampians Shire

LGA
■ Southern Grampians Shire

Visitation to the Southern Grampians Shire by Visitor Type

Visitor Type
■ Domestic Day   ■ Domestic O/night   ■ International Overnight
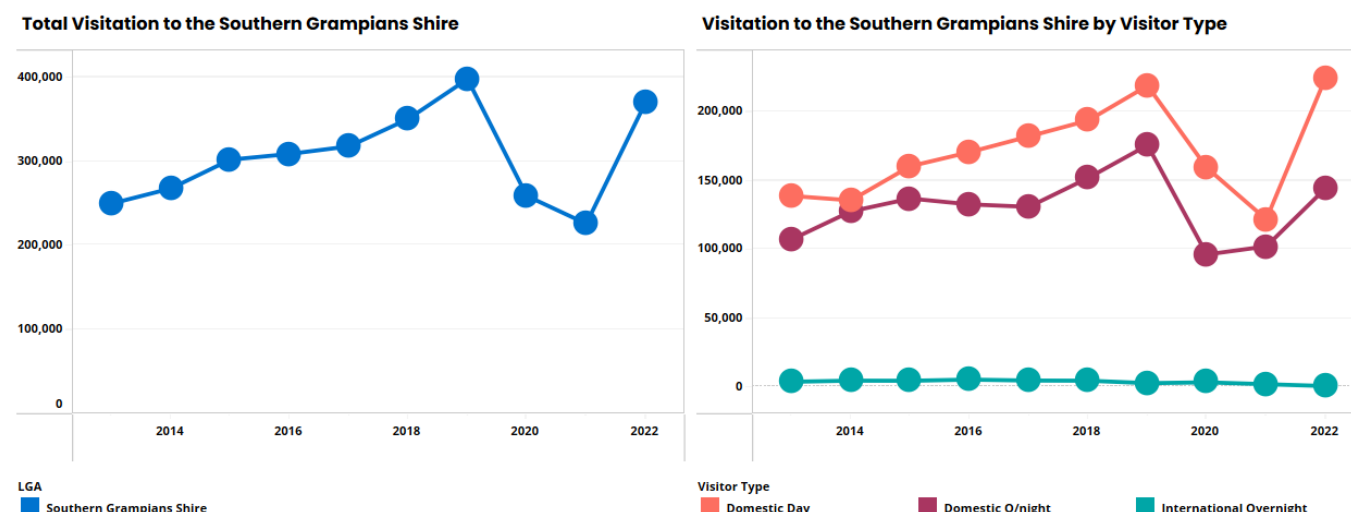
2.2.2. Historic Visitation

Before COVID-19, Southern Grampians Shire was experiencing strong visitor growth, with total visitation increasing from 250,000 in 2013 to just below 400,000 in 2019.

Like most destinations around Australia, COVID-19 saw visitation to the LGA decline to a low of 226,000 in 2021, however, the Shire has experienced a strong rebound in visitation, with 370,000 visitors travelling to the LGA as of 2022.

This rebound was driven by strong growth in domestic day trip visitation (increasing by 41%, or 66,000 visitors, between 2020 and 2022) and domestic overnight visitation (growing by 50% or 48,000 visitors).

The Shire has predominately attracted a domestic day trip market, with this market comprising 56% of all visitors over the last 10 years.

---

[2] 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.
[3] 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)[4]

Visitor Type to the Southern Grampians Shire

Visitor Type
- Domestic Day
- Domestic O/night
- International Overnight
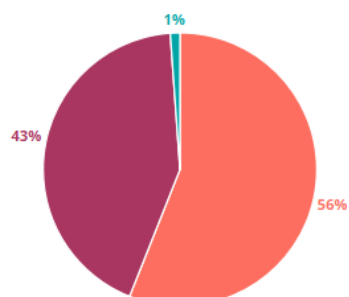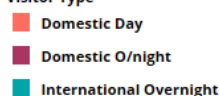
2.2.3. Historic Visitor Spending

While the day trip market forms an important component of the visitor economy, it typically is relatively low yielding, accounting for only 37% of visitor spending in the region in 2022, despite

comprising 61% of total visitation. Domestic day trippers, on average, spent $64 in the region, compared with domestic overnight visitors who spent 2.7 times this amount at $173 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 longer length of visitor stays;
- developing evening-based visitor products to encourage overnight stays; and
- introducing all-weather product for times of inclement weather.

Figure 6: Visitor Spend, 2013–2022[5]

Total Visitor Spend in the Southern Grampians Shire

Spend by Visitor Type in the Southern Grampians Shire

Visitor Type   Domestic Day   Domestic O/night   International Overnight

---

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

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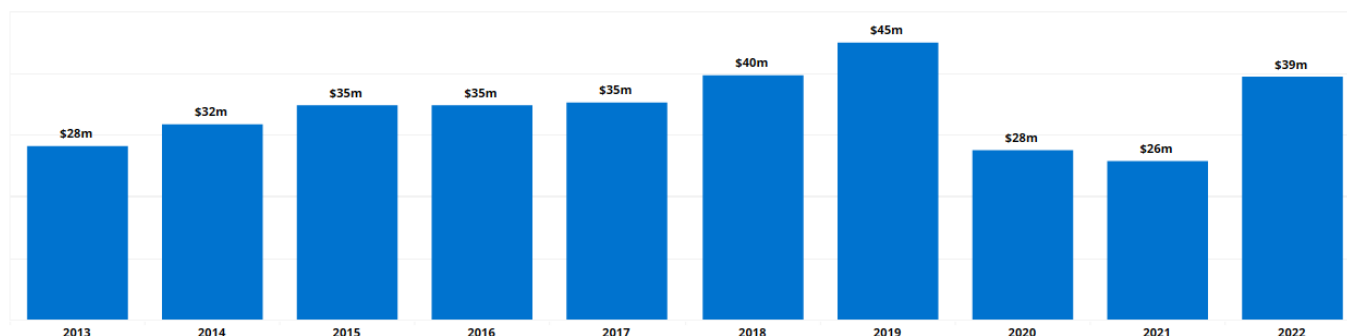
2.2.4.   Source Market

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

- The domestic day trip market is overwhelmingly made up of Victorians, comprising 90% of all travellers over the last 10 years. The remaining 10% originate from South Australia. The Shire has the largest proportion of interstate day trip visitors coming from SA and it is understood this is because of the travel patterns of many visitors who travel into the region as part of the journey from Adelaide and along the Great Ocean Road, rather than using inland routes.
- Victorians also make up most domestic overnight visitors, totalling 77% of all travel over the last 10 years, of which, anecdotally, the majority are from greater Melbourne. This is followed by South Australians (13%), NSW residents (6%),

Queenslanders (2%), and those from other states/territories (2%).

- Pre-COVID-19, key international markets included Asia, the UK, the USA, Germany, and New Zealand but numbers were small.
- If product is refreshed and new facilities (such as new 3-4 star accommodation options developed), the potential could exist to start to attract select international markets.
- The focus however should remain on growing intrastate travellers along with interstate travellers, especially if new product is able to develop including new food trails and walkways (linking to the southern end of the GPT by way of example), with new accommodation options, and leisure product along with a broader range of events and visitor attractions.

Figure 7: Day trip & domestic overnight visitor origin (10-year average, 2013–2022)[6]

Origin of Domestic Visitors to Southern Grampians Shire
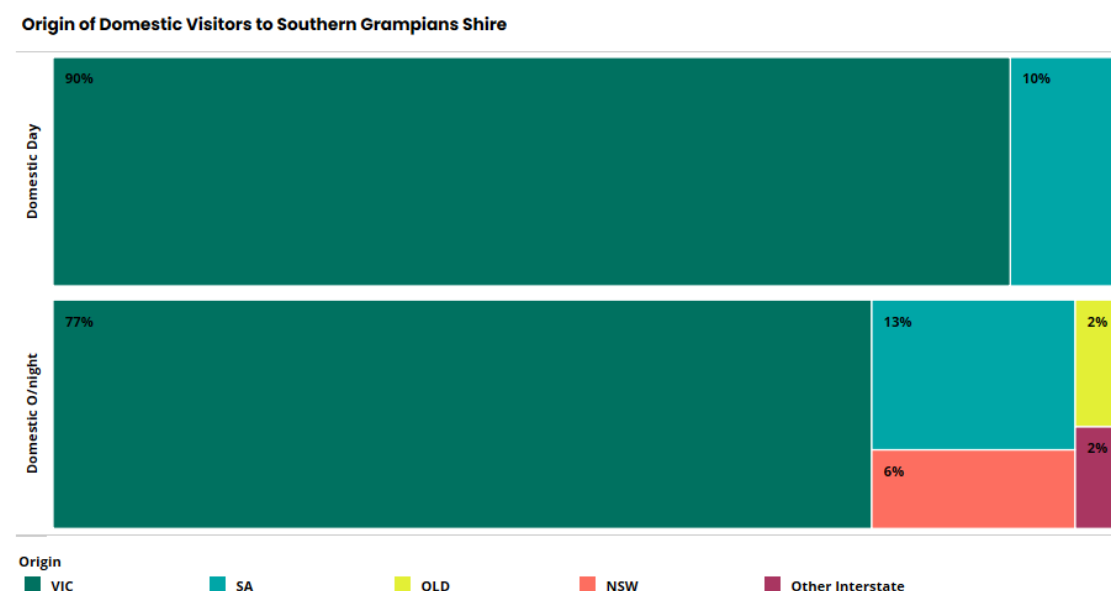
Figure 8: International overnight visitor origin (7-year average, 2013–2019)[7]

Origin of International Visitors to Southern Grampians Shire

---

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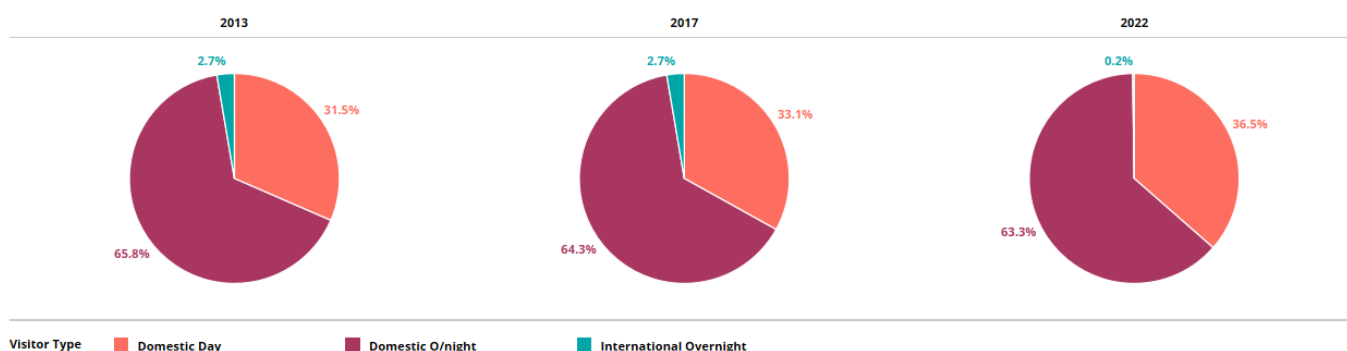[7] A 7-year average period has been used up to 2019 to reflect pre-COVID-19 data. Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

Figure 9: Motivation of travel (10-year average, 2013–2022)[8]

Visitor Type	Motivation		%
Domestic Day		**Holiday**	46%
		VFR	19%
		Business	14%
		Other	21%
Domestic O/night		**Holiday**	40%
		VFR	34%
		Business	17%
		Other	9%
International Overnight		**Holiday**	68%
		VFR	26%
		Business	4%
		Other	2%

2.2.5.   Motivation of Travel

The majority of visitors travel to the Southern Grampians Shire for leisure purposes, including to holiday and see friends and relatives. This includes travel across all towns and villages in the Shire.

Holiday visitation comprises 46% of domestic day travel, 40% of domestic overnight travel and 68% of international travel. This aligns with the current destination proposition of the Shire and the broader 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 for the Shire and presents the opportunity to promote the tourism assets and experiences to residents to promote to visiting friends and relatives market.

It is understood that the domestic business market is also growing to the Shire, however, to realise its full potential requires investment in accommodation and supporting facilities and infrastructure in main towns such as Hamilton.

[8] 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 Southern Grampians Shire and the broader Grampians region. The survey received 200 responses in total, of which 58 indicated they were primarily associated with Southern Grampians Shire.

58 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 Southern 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?

No 23 (46%)	Yes 23 (46%)

Unsure 4 (8%)

Top Networks respondants belong to

Grampians Tourism
5

Wimmera Mallee Tourism
2
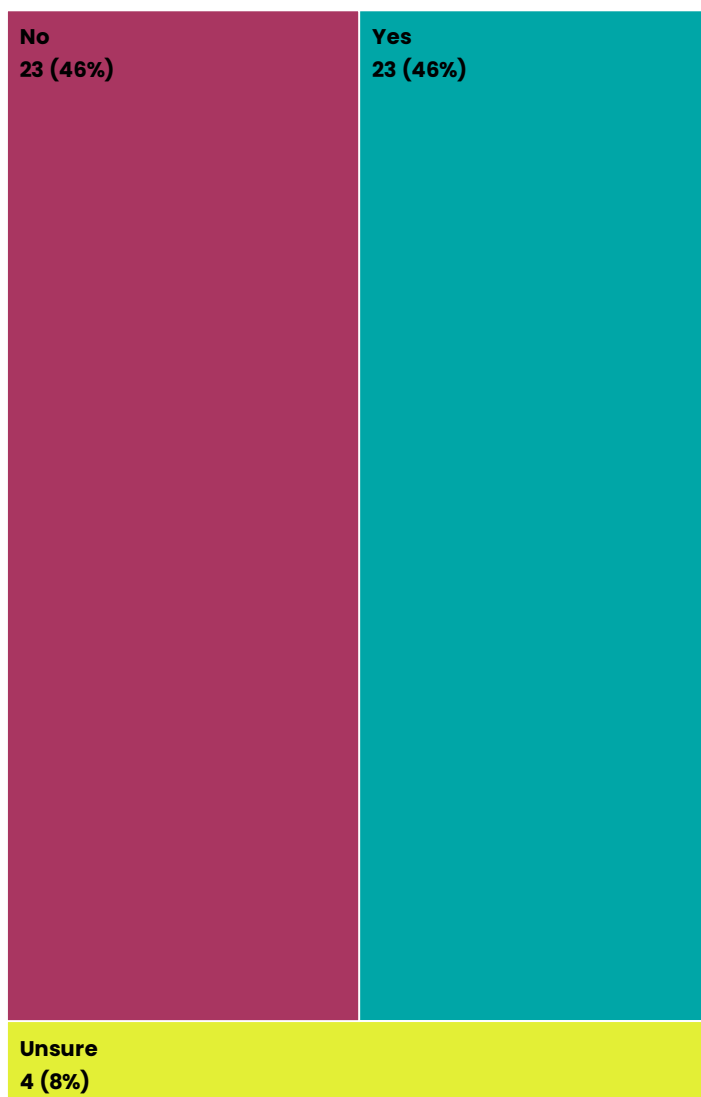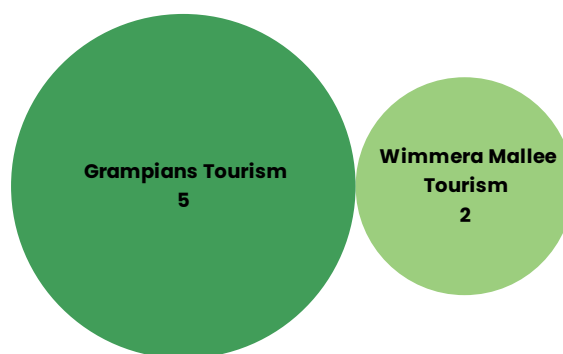
2.3.1.3.   Question 3

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

58 indicated Southern 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)

Category	Value
Tourism accommodation	11 (22%)
Tourism attraction and tour operators	8 (16%)
Interested community member	7 (14%)
Retail and visitor information	5 (10%)
Professional services (health, education, accounting,..	5 (10%)
Events and events venues	5 (10%)
Food and beverage	3 (6%)
Council personnel	2 (4%)
Construction, manufacturing and trades	2 (4%)
Environmental care	1 (2%)
Associations and groups	1 (2%)
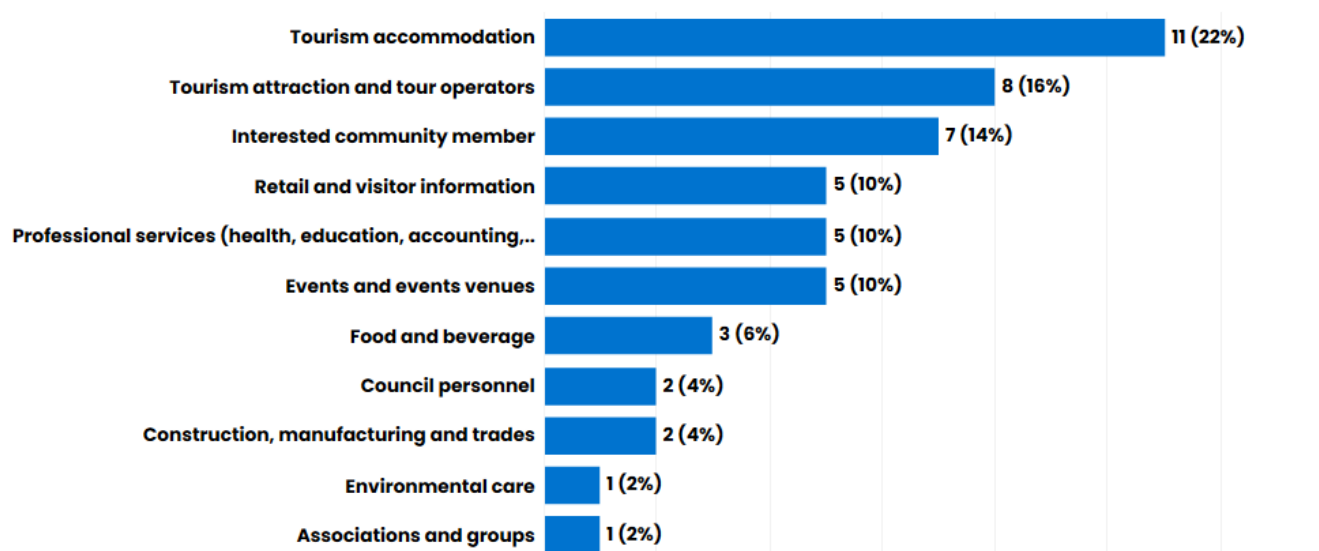
2.3.1.5.   Question 5

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

Category	Value
Social media (e.g. Facebook, Instagram)	38 (22%)
ATDW Listing	16 (9%)
Mail and email-outs	15 (9%)
Google Maps Listing	15 (9%)
Digital Marketing (e.g. SEM, online advertising etc)	15 (9%)
Local newspapers / magazines	14 (8%)
Community newsletter	12 (7%)
Local radio / TV	10 (6%)
Online business directory	9 (5%)
Media outside of the region	9 (5%)
Grampians Tourism Partnership	5 (3%)
Media famils	4 (2%)
Not applicable	3 (2%)
Via other tourism/business association	2 (1%)
Word of Mouth	1 (1%)
Other	1 (1%)

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.

Issue	Count (%)
Attracting and / or retaining skilled employees	19 (13%)
Government regulations (e.g. planning, permits, license..	17 (12%)
Low awareness of region	14 (10%)
Local economic conditions	14 (10%)
Lack of marketing / promotion support	14 (10%)
Obtaining finances	9 (6%)
Lack of worker housing & affordable accessible Housing, ..	9 (6%)
Lack of market demand	6 (4%)
Attracting and / or retaining volunteers	6 (4%)
Not applicable (no issues)	5 (3%)
Lack of space for growth / expansion	5 (3%)
Lack of marketing skills and training	5 (3%)
Labour costs	5 (3%)
Nature-related impacts (i.e. bushfires/droughts)	4 (3%)
Lack of demand	3 (2%)
Lack of business planning or financial management	3 (2%)
Lack of Council support	2 (1%)
COVID-related impacts	2 (1%)
Lack of preservation of natural assets and planning for cl..	1 (1%)

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.

Opportunity	Count (%)
Marketing / promotion support	34 (32%)
Business / industry networking and engagement opportunities	21 (20%)
Planning / compliance support	19 (18%)
Investment support / information	18 (17%)
Advocacy (housing, employment, insurance, infra, town beautification)	7 (7%)
Further industry training	4 (4%)
Other	2 (2%)
None	1 (1%)
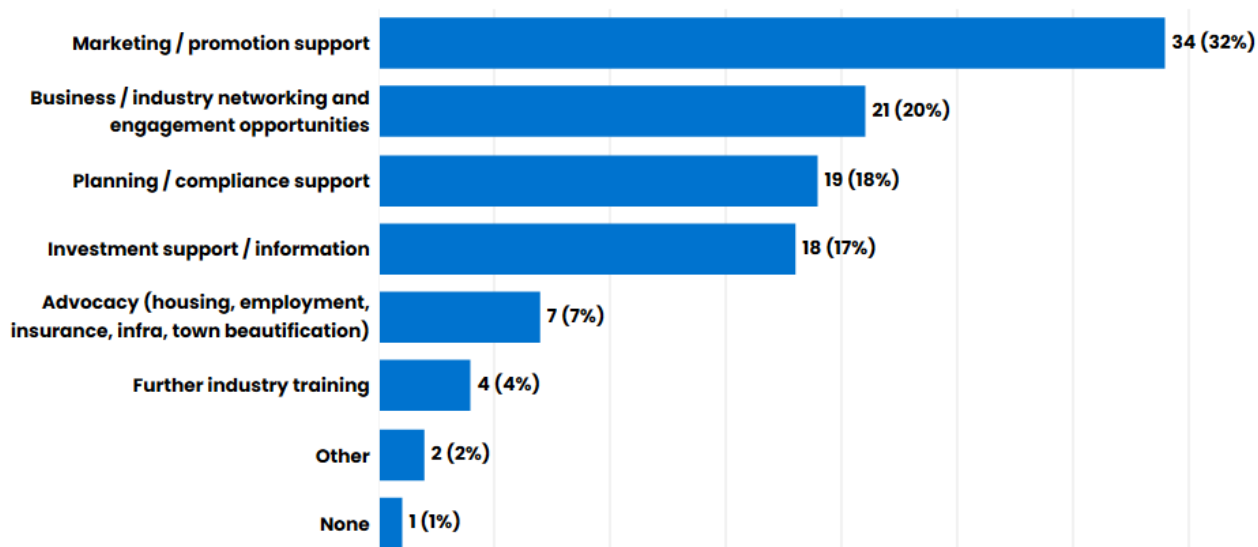
2.3.1.8. Question 8

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

Outcome	Value
Town centre improvements (e.g. street beautification)	29 (9%)
Promoting / marketing the region to visitors	29 (9%)
Improve wayfinding / signage for visitors	28 (9%)
Support the development of more local events	26 (8%)
Improve visitor amenities / services (e.g. picnic areas, to..	25 (8%)
Visitor dispersal throughout the region	24 (8%)
Support / promotion of smaller towns within the region	24 (8%)
Increase in annual visitation	22 (7%)
Development of new attractions / experiences	17 (5%)
Improved events facilities	16 (5%)
Enhanced use of nature-based assets with infrastructur..	16 (5%)
Business / industry support	16 (5%)
Encourage sustainable tourism	14 (4%)
Improve community and business networking / engage..	13 (4%)
Develop arts and cultural assets	8 (3%)
Improved infrastructure (roading, toilets, accessible faci..	5 (2%)
Other	3 (1%)

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.

Rank	Category
1	Destination marketing / promotion
2	Roads / transport infrastructure / accessibility
3	Development / support of local events
4	Town centre improvements
5	Development of new attractions / experiences
6	Conference centres / community facilities
7	Signage and wayfinding
8	Professional development / training
9	Business / industry networking opportunities

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).

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

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

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.
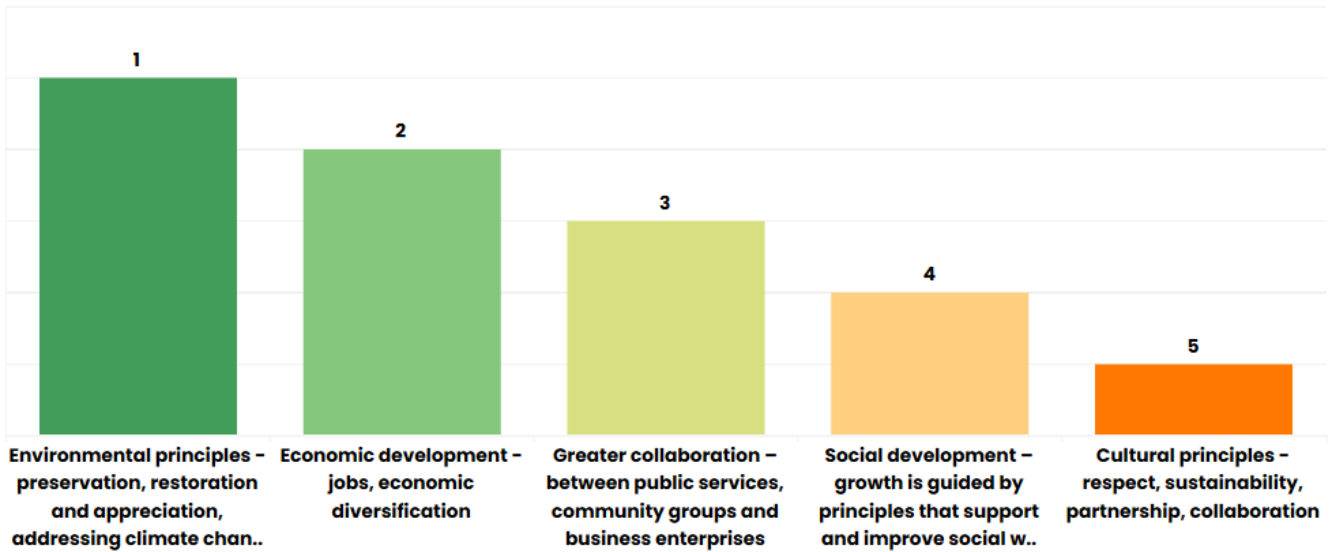
2.3.1.15. Question 15

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	**Southern Grampians Shire will be recognised as the region's food and arts hub complemented by its history and heritage profile and supported by growth in nature-based and events tourism, and its strategic location as the major access point to many surrounding regions.**

Strategic Objectives

1. Facilitate investment in the visitor economy that positions the Southern Grampians as an overnight hub for leisure and business along with major sporting and cultural events.
2. Support First Nations-led product development and delivery of tourism experiences especially around Dunkeld and Cavendish.
3. Achieve sustainable visitation patterns by growing visitor dispersal and off-peak visitation to support business sustainability and product development in key nodes such as Dunkeld, Cavendish etc.
4. Increase visitor yield by growing visitor dwell time and growing overnight visitation throughout the LGA.
5. Generate investment in supporting infrastructure that will enable visitor economy growth through improvements in road quality, potable water and sewage systems, Wi-Fi, and phone connectivity etc.
6. Support a cohesive, integrated, and supported industry and community where tourism benefits are shared throughout the LGA with greater opportunities for new business ventures for locals.

Targets

The following performance targets have been identified for the Southern Grampians Shire.

370,000 to 444,000
20% Growth
In overnight visitors to Southern Grampians Shire between 2022 and 2030.

$39m to $51m
30% Increase
In visitor expenditure in Southern Grampians Shire between 2022 and 2030.

2.6 nights to 3.1 nights
20% Growth
In the average length of stay in Southern Grampians Shire between 2022 and 2030.

Themes

Key themes to guide future investment in Southern 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**
2. **First Peoples**
3. **Food and Drink**
4. **Arts and Culture**
5. **Regional Accommodation**
6. **Identity, Marketing and Placemaking**
7. **Industry Development and Collaboration**
8. **Supporting Infrastructure**

Table 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. Ensure Southern Grampians water-based assets are prominently featured in marketing programs.
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 the Southern Grampians 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 Southern 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.

- The achievement of the high growth forecasts for Southern 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 Grampians Tourism, they will also benefit the Southern 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 the Southern Grampians to leverage this as well as just focus on the Southern Grampians' own LGA-specific projects.
- To achieve stronger visitation and related visitor spending for the future, Southern Grampians needs to:
  - work closely with Grampians Tourism and the other LGAs in the region, to ensure an integrated and coordinated approach to destination development and marketing occurs; and
  - work with its partners in the Great Ocean Road an Limestone Coast to encourage multi-region visits and longer in-region dwell time.

Figure 10: Visitor Forecasts, 2023 – 2032[9]

---

[9] 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
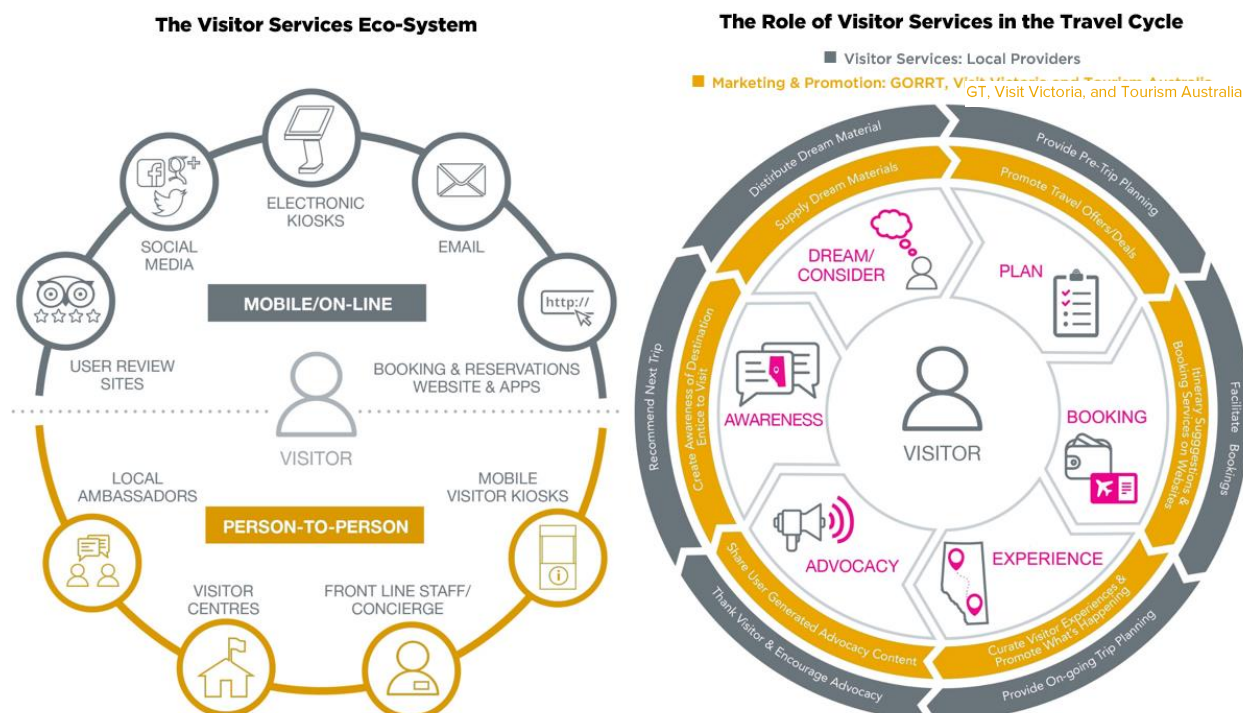
3.3.2. The Role of VICs

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".[10]

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.[11]

- 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 Southern Grampians and the broader Grampians region going forward. This is followed by Table 3 which provides a more detailed explanation.

---

[10] Page 2

[11] Visitor Information Services Guidelines, page 3

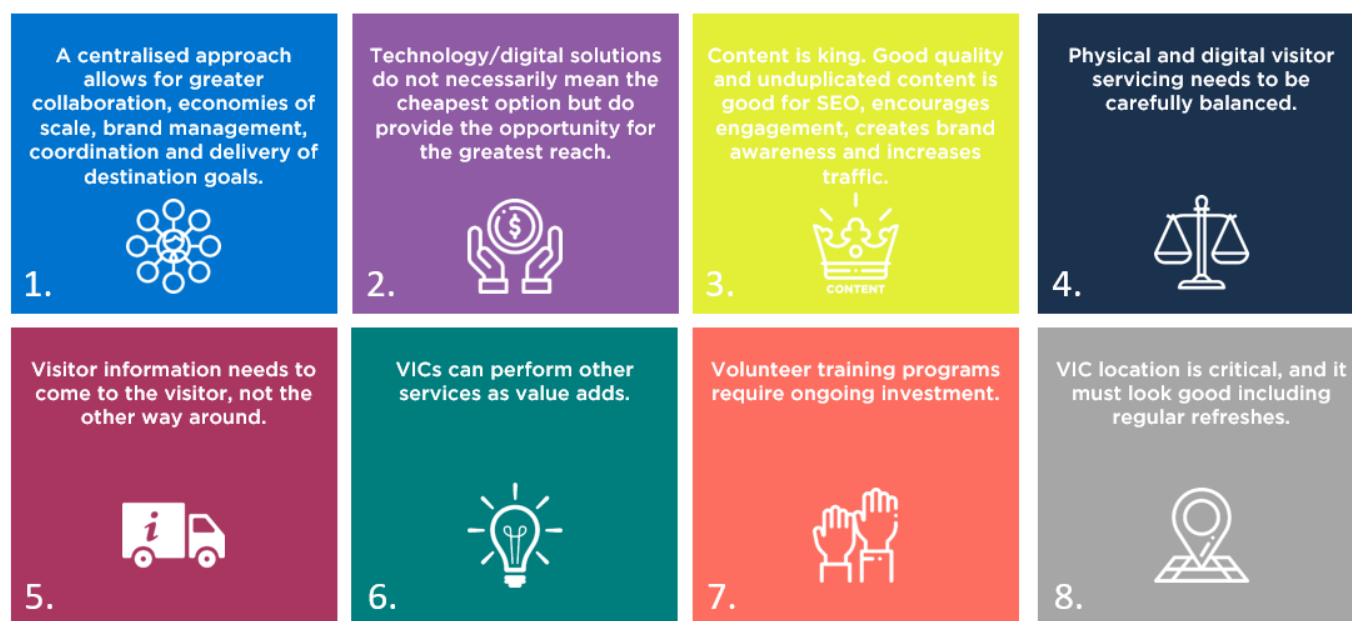|			
A centralised approach allows for greater collaboration, economies of scale, brand management, coordination and delivery of destination goals. 1.	**Technology/digital solutions do not necessarily mean the cheapest option but do provide the opportunity for the greatest reach.** 2.	**Content is king. Good quality and unduplicated content is good for SEO, encourages engagement, creates brand awareness and increases traffic.** 3.	**Physical and digital visitor servicing needs to be carefully balanced.** 4.
Visitor information needs to come to the visitor, not the other way around. 5.	**VICs can perform other services as value adds.** 6.	**Volunteer training programs require ongoing investment.** 7.	**VIC location is critical, and it must look good including regular refreshes.** 8.

Table 3: Comparative Analysis Lessons - Explained

1. A centralised approach allows for greater collaboration, economies of scale, brand management, coordination, and delivery of destination goals

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.

Currently, visitor information services (online and on-the-ground) across the region are undertaken in various different ways. The Visitor Information Centres are a blend of accredited and non-accredited centres. The Victorian Tourism Industry Council (VTIC) administers the state accreditation program and coordinates the VIS network. All four Shires have accredited centres that are represented at the State Reference Group. VIC staff meet quarterly to identify opportunities for collaboration and knowledge share. There is a need to identify opportunities for improved integrated visitor experiences, both in person and online, across the region.

2. Technology/digital solutions do not necessarily mean the cheapest option but do provide the opportunity for the greatest reach.

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.

However, digital visitor services provide the opportunity to reach visitors throughout all stages of the travel cycle. Physical VICs are often more constrained.

3. Content is king

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.

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.

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.

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 Southern Grampians Shire

Visitor servicing is but one avenue of change that Southern 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 each of the Shire's three VICs. When reviewing this data, it is important to note that it is COVID-19 impacted with closures of the VIC being reflected in the years 2020 and 2021 in particular.

The Shire's three VICs generate a collective net operating loss of $519,000, based on 2022 FY data (see Table 4). The ongoing investment required to continue to deliver visitor services continues to grow across the country. Across the Shire, delivering the VICs in 2022 cost Council and ratepayers $13.31 for every visitor that entered the VICs.

While getting a true picture of visitation trends to the VIC is difficult due to the impact of COVID-19 and the closures that resulted from this, it is noted that nationally and internally a declining number of visitors are utilising walk-in visitor information centres, with a study from Tourism and Events Queensland finding that only 4.4% of

visitors nation-wide utilise VICs[12] during their travel. This could also be seen in pre-COVID data which indicates that visitation to all three of the VICs was slowly declining (except for Dunkeld between 2018 and 2019).

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 optimum return on investment and generating strong enough reach to a sufficiently broad visitor base. We do also note, however, that industry feedback via the survey conducted for this project, indicated very positive support for the work of the VICs and the support they offer to the industry.

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]
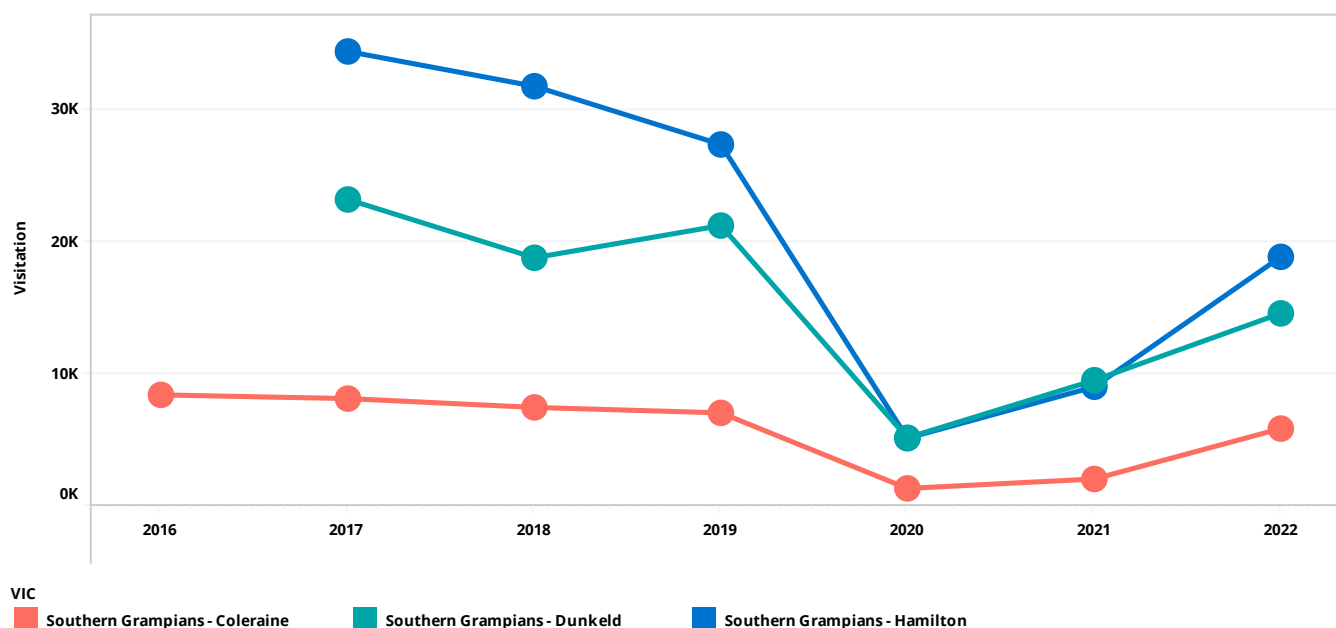
Table 4: Southern Grampians Shire Combined VIC Financial Metrics (2021 – 2022 FY)[14]

Type	2021	2022
Income	$2.5k	$3.5k
Expenditure	-$462k	-$523k
Net Position	-$460k	-$519k
Visitors	21k	39k
Net Position p/Visitor	-$21.88	-$13.31

---

[12] Queensland Visitor Information Centres, Snapshot of the year ending September 2017, Tourism and Events Queensland
[13] Data provided by Council

[14] A breakdown for each VIC was not provided rather a combined picture covering Council's VIC portfolio was provided.

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 have been categorised according to whether they are Development Projects or Strategic Initiatives:

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

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

4.1.1.1. Timeframes

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

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

4.1.1.2. Responsibility

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

4.1.1.3. Cost Estimates

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

4.1.1.4. How recommendations were prioritised

4.1.1.4.1. Prioritising the Strategic Initiatives

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

4.1.1.4.2. Prioritising the Development Projects

To determine the priority Development Projects, each has been assessed against the weighted criteria outlined in Table 5. 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 5: 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.

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

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

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

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

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

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

Table 6: Theme 1 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
⭕	Agridome showcase attraction	▪ Undertake a business case and feasibility to assess the potential for an agridome showcase visitor attraction. ▪ Assess potential grant funding streams that could support the concept.	$12.0m for development and $65k for the business case and feasibility	SGSC	Medium-long tern
⭕	Dunkeld geothermal bathing experience ⭐	▪ Identify potential sites for the experience. ▪ Prepare investment prospectus to identify opportunities and encourage operators and their investors.	$7.5m	SGSC	Medium term

Type	Recommendation	Action	Estimated Cost	Who	When
⭕	Dunkeld nature playground	▪ Commission the design of a potential nature playground for Dunkeld. ▪ Identify potential grant funding streams to fund the development of the playground.	$250k	SGSC	Medium term
⭕	Hamilton Botanic Garden playspace profiling	▪ Commission professional media provider to capture high-quality media of the playspace once development is completed. ▪ Incorporate media into destination marketing for the garden and the LGA. ▪ Ensure media is provided to GT and VV for incorporation into regional and state media databases.	$10k	SGSC	Short term
⭕	Implementation of the Volcanic Trail Masterplan (including upgrade of Penshurst Volcanoes Discovery Centre)	▪ Continue to advocate for the implementation of the Masterplan. ▪ Identify potential grant funding streams to fund the completion of the Masterplan.	$9.2m	SGSC	Medium - long term
⭕	Multi-use trails across SCSC	▪ Continue to develop the 137 km of missing shared user pathways to provide recreation opportunities for the community with priority focus on the Hamilton Coleraine Rail Trail	$5.2m	SGSC	Medium - long term
⭕	Reassessment of GPT 2-3-day walking treks from Dunkeld	▪ Undertake site assessment and development requirements ▪ Marketing program to encourage Dunkeld as the gateway to GPT	$25k for site assessment and $35k for marketing program	Parks Victoria / SGSC	Short – medium term
⭕	Recreational fishing and competition	▪ Prepare a business plan to assess the potential of a recreational fishing competition in the region.	$65k	ARCC, HRCC, NGSC, SGSC, GT	Medium term
⭕	Rocklands Reservoir Recreation Masterplan	▪ Formalise relationships between management /key stakeholders & users group to enable the development a masterplan	$100K	GWM Water, SGSC	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.[15] The region is also home to 80% of all First Peoples' rock art in Victoria.[16]

This theme focuses on ensuring the region is guided by the Grampians' First Peoples' communities to support distinctive and authentic First Peoples' experiences, helping to build a greater understanding of First Peoples' stories in both historical and contemporary forms. This will help build awareness of the Grampians', and Victoria's (more broadly), First Peoples' product offering (which is relatively low compared with other jurisdictions such as the Northern Territory and Queensland)[17]. "Being 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.

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 7: Theme 2 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Industry training with First Peoples and Elders including a cultural induction for Licensed Tour Operators ⭐	▪ Organise a series of workshops with First Peoples' elders and industry operators to enable greater cultural understanding.	$45k	RDV, GT, VV, TOs, BGLC, GMTO, EMAC, DDWCAC,	Short term
⭕	First Peoples' cultural tourism product development	▪ Work with Aboriginal Land Councils (Barengi Gadjin Land Council, Gunditj Mirring Traditional Owners Aboriginal Corporation, Eastern Maar Aboriginal Corporation, Dja Dja Wurrung Clans Aboriginal Corporation) to facilitate, and foster authentic and unique cultural experiences and share their cultural story with visitors when they are ready to do so. ▪ Support and enable the development of each Land Council's tourism aspirations.	$250k	GT, BGLC, GMTO, EMAC, DDWCAC, ARCC, HRCC, NGSC, SGSC, RDV, VV	Medium – longer term
◆	First Peoples' place names	▪ Collaborate with TOs and Land Councils to advocate for more active use of First Peoples' names.	$80k	RDV, PV, TOs, BGLC, GMTO, EMAC, DDWCAC, ARCC, HRCC, NGSC, SGSC	Short – medium term

⭕ **Development Projects**   ◆ **Strategic Initiatives**   ⭐ **Priority Project/initiative**

---

[15] https://www.dcceew.gov.au/parks-heritage/heritage/places/national/grampians#:~:text=Known%20as%20Gariwerd%20by%20local,Aboriginal%20art%20motifs%20in%20Victoria

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

[17] Visitor Economy Master Plan Directions Paper, page 27.

[18] Ibid

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.

Table 8: Theme 3 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Creation of a regional producer's trail	▪ Audit and implement the development of a regional producer's trail for the Grampians. ▪ Commission a professional media provider to capture high-quality media of the trail and its providers. ▪ Incorporate the trail into destination marketing for the Grampians.	$65k	GT, ARCC, HRCC, NGSC, SGSC, RDV, DJSIR	Short – medium term

⬤ **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.

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

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

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

Table 9: Theme 4 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Ansett Museum feasibility and master plan	▪ Commission the development of a feasibility and master plan to rejuvenate and reimagine the Ansett Museum experience to make it a more diverse and appealing visitor experience.	$250k	Ansett Museum, SGSC	Medium term
◆	Grampians culture passport ticket	▪ Undertake top-line demand and cost assessment for a regional cultural passport ticket. ▪ If the concept is viable, host a workshop with all Councils and cultural facilities to gauge buy-in and interest and to promote the potential benefits.	$45k	GT, RDV	Short-medium term
◯	Hamilton Gallery revitalisation ⭐	▪ Continue to support and advocate for the planned redevelopment of the Hamilton Gallery.	$5.0m	SGSC	Medium term
◯	Hamilton Gardens weekends (public and private)	▪ Working with Hamilton's gardens and potentially transport operators, provide a series of packaged garden tours, and look to re-establish the Hamilton Gardens Weekends.	$50k	SGSC	Short term

◯ **Development Projects** ◆ **Strategic Initiatives** ⭐ **Priority Project/initiative**

4.1.6.   Theme 5: Regional Accommodation

The quality of accommodation throughout regional Victoria remains a challenge, with 68% of regional accommodation being budget or mid-scale.[19] 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.

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

A 3.5 - 4-star branded facility is suggested, of no less than 60 rooms for Hamilton to meet the needs of the leisure market and the regular business traveller market coming through the region.

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

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

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.

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

---

[19] STR August 2022

Table 10: Theme 5 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Advocate for/encourage motel retrofitting	▪ Host an annual workshop in each LGA with motel and accommodation operators to promote the benefits of accommodation retrofitting, demonstrating case studies of success and where this has led to improved ROI and demand	$45k	ARCC, HRCC, NGSC, SGSC, VV, RDV, GT	Short - medium term
◆	Designation of sites for worker accommodation and packaging of these to investors ⭐	▪ Work with Councils to identify potential sites that are suitable for marketing the development of worker accommodation. ▪ Develop a prospectus to take to worker accommodation investors.	$120k for site determination, planning study and investment prospectus	ARCC, HRCC, NGSC, SGSC, GT, RDV	Short - medium term
⭕	Dunkeld luxury units ⭐	▪ Prepare feasibility and business case to identify opportunities and encourage operators and their investors ▪ Prepare investment prospectus for sending to investors.	$7.0m for development, $65k for feasibility and business case	SGSC	Medium – long term
⭕	Hamilton CBD branded accommodation (60+ rooms) ⭐	▪ Prepare feasibility and business case to identify opportunities and encourage operators and their investors. ▪ Prepare investment prospectus for sending to investors.	$35m for development, $65k for feasibility and business case	SGSC	Medium – long term
⭕	Coleraine and Penshurst Caravan Parks Masterplan implementation	▪ Advocate for the funding and implementation of the Masterplans.	To be determined	SGSC	Short - medium 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.

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

- Assessing current VIC performance across the region (i.e., utilisation, penetration rates, financial performance, digital performance etc.).
- Shifting to potentially a stronger focus on the provision of online information through the region's destination websites.
- There is a need to ensure that updated and relevant information is provided across all visitor information channels, including to trade and tourism operators outside the region.
- Identifying mobile coverage "dead spots" to ensure that physical visitor information is provided in these locations.
- Improving wayfinding and signage to encourage greater visitor dispersal throughout the region.
- Investigating new and more flexible options to deliver visitor information services including mobile visitor information services, automated information containers/kiosks, high-quality digital information platforms and co-locating visitor information services with other facilities such as art galleries, museums, and libraries.
- Coordinating any local destination websites to ensure that a consistent and accurate message is offered to those interested in visiting.
- Investigate initiatives that leverage the knowledge of the area held by semi-retired and retired community members and develop a "roving ambassador" program to assist visitors during peak season periods, events etc.

- Assessing alternative roles that VICs can fulfil such as being emergency coordination centres.

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

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

Tourism Investment Marketing Campaign: Grampians 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 11: Theme 6 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Advocate to streamline State Government planning process	▪ Continue to collectively advocate to State Government planning regarding the need to streamline the planning process and the blockages that are occurring	$40k	GT, ARCC, HRCC, NGSC, SGSC, RDV, DJSIR	Short term
◆	Destination branding for LGAs in partnership with GT	▪ Commission the development of destination branding for the four LGAs to better align with the regional destination branding. This should be done in close collaboration with tourism operators to ensure buy-in.	$160k	GT, ARCC, HRCC, NGSC, SGSC	Short-medium term
◆	Events toolkit for each LGA	▪ Develop an events toolkit for each LGA to demonstrate that each is 'open' for events and to make event planning easier for event organisers.	$20k	GT, ARCC, HRCC, NGSC, SGSC	Short term-medium term
◆	Hamilton Botanic Gardens profiling	▪ Stronger profiling of the Hamilton Botanic Gardens through the introduction of garden tours, enhanced signage, and new events.	$35k	SGSC	Short term
◆	Promotional campaign focusing on non-Grampians National Park assets	▪ Develop a marketing campaign that is specifically focused on non-GNP assets including rock lands, volcanic lakes and plains, and waterfalls. ▪ Deliver the campaign over two years.	$65k	PV, GT, ARCC, HRCC, NGSC, SGSC	Medium term
◆	Regional visitor servicing strategy ⭐	▪ Undertake regional visitor servicing strategy to reassess visitor servicing needs and the various options for delivery.	$100k	ARCC, HRCC, NGSC, SGSC, GT	Short-medium term
◆	Review of LGA planning schemes ⭐	▪ Secure grant funding for reviews of LGA planning schemes to introduce tourism development on rural/agricultural land.	$100k	RDV, VPA, GT, ARCC, HRCC, NGSC, SGSC	Short – medium term
◆	Strong profiling of Grampians Peaks Trail hub improvements (southern and two-way access)	▪ Now that trail access and booking improvements have been implemented and visitors can book via southern entry points and two-way access, this should be strongly profiled on an ongoing basis to ensure awareness.	$50K	PV, SGSC, Operators, GT	Short term
◆	Tourism awareness (value of the visitor economy) campaign for industry and residents	▪ Raise community awareness of the value and importance of the visitor economy as a mechanism to support community social licence, economic outcomes, and environmental and cultural benefits.	$40k	ARCC, HRCC, NGSC, SGSC, GT	Medium term
◆	Tourism investment marketing campaign ⭐	▪ Secure additional funding for a dedicated promotional campaign.	$120k	GT, RDV	Short term
◆	Tourism planning zones study	▪ Undertake a study across the region to develop dedicated zones to support new tourism development.	$65k	GT, ARCC, HRCC, NGSC, SGSC, VPA, RDV	Short term

◯ **Development Projects**   ◆ **Strategic Initiatives**   ⭐ **Priority Project/initiative**

4.1.8.   Theme 7: Industry Development and Collaboration

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

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

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

4.1.8.1.   Priority Recommendations

The following are the priority recommendations under 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.

Table 12: Theme 7 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Distribution of SpendMap data	▪ Distribute SpendMap data to businesses on a bi-annual basis to show businesses consumer spending trends throughout each LGA (for those LGAs that subscribe).	$12k	ARCC, HRCC, NGSC, SGSC, GT	Short-medium term
◆	Expanding in-region tourism training opportunities for locals	▪ Work with local providers to expand in-region training opportunities including building a business case for more in-region training to grow local skills to support a broader range of roles and support out-of-the-box employment. ▪ Undertake an annual skills needs survey in collaboration with registered training organisations (RTOs) to build a business case for more in-region training and gain an understanding of the current skills needs.	$20k	ARCC, HRCC, NGSC, SGSC, GT, RDV, DJSIR	Short-medium term

Type	Recommendation	Action	Estimated Cost	Who	When
◆	F&B roster development	▪ Work with F&B operators in each major town to get buy-in from those interested in signing up for an F&B roster system. ▪ Work with operators to develop the roster. ▪ Profile those operators who are involved in the roster system.	$20k	ARCC, HRCC, NGSC, SGSC, GT	Short – medium term
◆	Food & Wine Appreciation training program	▪ Provide targeted training and support for F&B operators to upskill.	$40k	DJSIR, GT, ARCC, HRCC, NGSC, SGSC	Short - medium term
◆	Industry development training (customer service, product/experience development, social media, marketing, grant application writing) ⭐	▪ Work with DJSIR to develop a region-wide industry training program for tourism industry operators. ▪ Leverage the $34m State and Federal investment in the Grampians Peaks Trail by implementing a targeted LTO training program for operators keen to commence operations on the trail or existing operators wanting to upskill further.	$100k	GT, DJSIR	Medium term
◆	Small Business Bus by Business Victoria profiling	▪ Profile the Small Business Bus by Business Victoria and encourage industry operators to utilise the service.	$10k	DJSIR, GT, ARCC, HRCC, NGSC, SGSC	Medium term
◆	Southern Grampians local tourism group	▪ Re-establish the Southern Grampians local tourism group.	$20k	GT, SGSC, industry	Short-medium term

⬤ **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.

Advocacy 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.

- 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 taking over 14 hours and involving several modes of transport. While vehicle transport is likely going to continue to be 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.

Table 13: Theme 8 Action Plan

Type	Recommendation	Action	Estimated Cost	Who	When
◆	Advocacy for peak season public transport options around the Grampians ⭐	▪ Develop peak season public transport options plan to take to government as an advocacy piece. ▪ As a region, continue to advocate for improved peak season public transport options around the Grampians.	$150k	SGSC, NGSC, ARCC, HRCC, RDV, GT	Short term
○	Dunkeld, Balmoral, and Cavendish waste management	▪ Make improvements to rubbish pickup schedules to address community concerns around peak-period rubbish issues.	$40k	SGSC/GWM Water	Short term
◆	Electric charging stations around the Grampians	▪ Identify investment required to support electric charging stations around the Grampians working in collaboration with Councils to ensure duplication of effort does not occur.	$1.2m	ARCC, HRCC, NGSC, SGSC, GT, RDV	Short-medium term
◆	Hamilton as a hub for caravans/RVs (RV parking, promotional campaigns etc.)	▪ Identify investment required to support positioning Hamilton as a hub for RV touring and visitation, including signage and dump points. ▪ Develop media collateral to promote Hamilton as a hub for caravans/RVs and ensure this is distributed to GT and VV	$60k	SGSC	Short-medium term

Type	Recommendation	Action	Estimated Cost	Who	When
○	Public toilet facilities at Dunkeld Arboretum	▪ Look to develop public toilet facilities at Dunkeld Arboretum. ▪ Identify funding programs/streams to fund this investment.	$145k	SGSC, State Government	Long term
◆	Road improvements to VicRoads	▪ Continue to advocate for road improvements to VicRoads.	$35k for advocacy	VicRoads, RDV, GT, ARCC, HRCC, NGSC, SGSC	Short term (ongoing)
◆	Lake Hamilton rowing course expansion	▪ Investigate extending the rowing course to 1,000m for rowing events. ▪ If feasible, identify funding streams or grants to support the expansion.	$1.0m estimate for expansion and $25k for investigation	Hamilton Rowing Club, SGSC	Long term
◆	Signage audit & upgrades (directional & interpretive)	▪ Commission a regional tourism signage audit that focuses on both direction and interpretive signage and provides recommendations for improvements.	$100k	GT, ARCC, HRCC, NGSC, SGSC	Medium term

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

Part 5: Appendices

Appendix 1 Full Survey Questions

grampians *tourism*

Grampians Destination Management Plan & Local Area Action Plans

Have your say

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

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

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

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

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

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

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

[   ]

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

◯ No

◯ Unsure

◯ Yes (please specify)

[   ]

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

☐ Ararat Rural City Council

☐ Horsham Rural City Council

☐ Northern Grampians Shire Council

☐ Southern Grampians Shire Council

☐ Other (please specify)

[   ]

* 4. What best describes your business/organisation?

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

○ Food and beverage

○ Tourism accommodation

○ Tourism attraction

○ Retail

○ Transport

○ Professional services (accounting, marketing, media etc.)

○ Events

○ Council personnel

○ Parks Victoria personnel

○ Interested community member

○ Other (please specify)

[   ]

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

☐ Grampians Tourism Partnership

☐ ATDW Listing

☐ Google Maps Listing

☐ Social media (e.g. Facebook, Instagram)

☐ Online business directory

☐ Community newsletter

☐ Digital Marketing (e.g. SEM, online advertising etc)

☐ Local newspapers / magazines

☐ Media outside of the region

☐ Local radio / TV

☐ Mail and email-outs

☐ Media famils

☐ Not applicable (no marketing or promotion)

☐ Other (please specify)

[   ]

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

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

☐ Increase in annual visitation	☐ Improved events facilities
☐ Visitor dispersal throughout the region	☐ Development of new attractions / experiences
☐ Town centre improvements (e.g. street beautification)	☐ Support / promotion of smaller towns within the region
☐ Promoting / marketing the region to visitors	☐ Improve visitor amenities / services (e.g. picnic areas, toilet blocks, etc.)
☐ Business / industry support	☐ Improve wayfinding / signage for visitors
☐ Improve community and business networking / engagement	☐ Enhanced use of nature-based assets with infrastructure and promotion
☐ Support the development of more local events	☐ Encourage sustainable tourism
☐ Develop arts and cultural assets	
☐ 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	
Beverage (wine, beer, distilling etc)	
Accommodation	
Nature-based (e.g. infrastructure, tours, experiences etc)	
Cycling (e.g. specific cycle loops, locations for mountain biking etc)	
Arts and culture (e.g. museums, galleries, interactive experiences, First Nations experiences etc)	
Other (please specify)	

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

Roads	
Public transport	
Aviation	
Digital infrastructure (i.e. telecoms)	
Services infrastructure (e.g. water, sewer)	
Visitor servicing (i.e. visitor information, signage etc)	
Other (please specify)	

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

≡ ⇕ Environmental principles - preservation, restoration and appreciation, addressing climate change

≡ ⇕ Economic development - jobs, economic diversification

≡ ⇕ Greater collaboration – between public services, community groups and business enterprises

≡ ⇕ Social development – growth is guided by principles that support and improve social well-being of the community

≡ ⇕ Cultural principles - respect, sustainability, partnership, collaboration

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

Appendix 2 Full Matrix with Values

Table 14: Full matrix with values

Opportunity Name	Ability to encourage stronger internatio..	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 ongo ing oper..	Short term to Activate	Uniqueness of Product
Agridome showcase attraction	Medium	Medium	Medium	Medium	Low	Limited	Limited	5-10 FTE	High	Private	High	Medium	Medium	Medium	No	State-wide Unique
Dunkeld geothermal bathing experience	Strong	Strong	Strong	Limited	Medium	Medium	Limited	5-10 FTE	Low	Private	Very Low or None	High	High	None	No	Locally Unique
Dunkeld luxury units	Strong	Medium	Strong	Limited	Medium	Medium	Limited	5-10 FTE	Low	Private	Very Low or None	High	None	None	No	Locally Unique
Dunkeld nature playground	None	None	Limited	Medium	Low	n/a	Limited	n/a	High	Council	High	Very Low or None	None	Limited	No	Locally Unique
Dunkeld rubbish management	n/a	n/a	n/a	Limited	None	n/a	n/a	n/a	n/a	Mixed	High	Very Low or None	None	Medium	Yes	n/a
Hamilton CBD branded accommodation (60+ rooms)	Medium	Medium	Strong	None	High	Medium	None	21-50 FTE	High	Private	Very Low or None	High	None	None	No	Locally Unique
Hamilton Gallery redevelopment	Medium	Medium	Limited	Medium	Low	Medium	None	5-10 FTE	Medium	Council	High	Very Low or None	High	Medium	No	Locally Unique
Hamilton gardens weekends (public and private)	Medium	Medium	Medium	Medium	Medium	Limited	Medium	Less than 5 FTE	Medium	Mixed	Very Low or None	High	None	Limited	Yes	Locally Unique
Implementation of the Volcanic Trail Masterplan	n/a	n/a	Medium	Limited	Low	Medium	Strong	Less than 5 FTE	Medium	Council	High	Very Low or None	Low	Medium	No	Locally Unique
Multi-use trails across SGSC	Limited	Limited	None	Limited	Low	Limited	Medium	Less than 5 FTE	Low	Other Govt.	High	Very Low or None	None	Medium	No	Locally Unique
Public toilet facilities at Dunkeld Arboretum	n/a	n/a	n/a	Medium	None	n/a	None	n/a	High	Mixed	High	Very Low or None	None	Medium	No	n/a

Appendix 3 Full Matrix with Scores

Table 15: Full matrix with scores (unweighted score/weighted score)

Opportunity Name	Strategic Investment Theme	LGA	Ability to encourage stronger internatio..	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
Agridome showcase attraction	Nature and Recreation	Southern Grampians	2 / 4	2 / 6	2 / 10	2 / 4	1 / 4	1 / 5	1 / 4	2 / 6	3 / 12	3 / 6	0 / 0	2 / 4	2 / 8	2 / 10	2 / 4	0 / 0	3 / 12	**30 / 99**
Dunkeld geothermal bathing experience	Nature and Recreation	Southern Grampians	3 / 6	3 / 9	3 / 15	1 / 2	2 / 8	2 / 10	1 / 4	2 / 6	1 / 4	3 / 6	3 / 12	3 / 6	3 / 12	3 / 15	4 / 8	0 / 0	1 / 4	**38 / 127**
Dunkeld luxury units	Regional Accommodation	Southern Grampians	3 / 6	2 / 6	3 / 15	1 / 2	2 / 8	2 / 10	1 / 4	2 / 6	1 / 4	3 / 6	3 / 12	1 / 2	3 / 12	0 / 0	4 / 8	0 / 0	1 / 4	**32 / 105**
Dunkeld nature playground	Nature and Recreation	Southern Grampians	0 / 0	0 / 0	1 / 5	2 / 4	1 / 4	1 / 5	1 / 4	1 / 3	3 / 12	2 / 4	0 / 0	1 / 2	0 / 0	0 / 0	3 / 6	0 / 0	1 / 4	**17 / 53**
Dunkeld rubbish management	Supporting Infrastructure	Southern Grampians	1 / 2	1 / 3	1 / 5	1 / 2	0 / 0	1 / 5	1 / 4	1 / 3	1 / 4	1 / 2	0 / 0	1 / 2	0 / 0	0 / 0	2 / 4	1 / 4	1 / 4	**14 / 44**
Hamilton CBD branded accommodation (60+ rooms)	Regional Accommodation	Southern Grampians	2 / 4	2 / 6	3 / 15	0 / 0	3 / 12	2 / 10	0 / 0	4 / 12	3 / 12	3 / 6	3 / 12	1 / 2	3 / 12	0 / 0	4 / 8	0 / 0	1 / 4	**34 / 115**
Hamilton Gallery redevelopment	Arts and Culture	Southern Grampians	2 / 4	2 / 6	1 / 5	2 / 4	1 / 4	2 / 10	0 / 0	2 / 6	2 / 8	2 / 4	0 / 0	1 / 2	0 / 0	3 / 15	2 / 4	0 / 0	1 / 4	**23 / 76**
Hamilton gardens weekends (public and private)	Arts and Culture	Southern Grampians	2 / 4	2 / 6	2 / 10	2 / 4	2 / 8	1 / 5	2 / 8	1 / 3	2 / 8	1 / 2	3 / 12	2 / 4	3 / 12	0 / 0	3 / 6	1 / 4	1 / 4	**30 / 100**
Implementation of the Volcanic Trail Masterplan	Nature and Recreation	Southern Grampians	1 / 2	1 / 3	2 / 10	1 / 2	1 / 4	2 / 10	3 / 12	1 / 3	2 / 8	2 / 4	0 / 0	1 / 2	0 / 0	1 / 5	2 / 4	0 / 0	1 / 4	**21 / 73**
Multi-use trails across SGSC	Nature and Recreation	Southern Grampians	1 / 2	1 / 3	0 / 0	1 / 2	1 / 4	1 / 5	2 / 8	1 / 3	1 / 4	1 / 2	0 / 0	1 / 2	0 / 0	0 / 0	2 / 4	0 / 0	1 / 4	**14 / 43**
Public toilet facilities at Dunkeld Arboretum	Supporting Infrastructure	Southern Grampians	1 / 2	1 / 3	1 / 5	2 / 4	0 / 0	1 / 5	0 / 0	1 / 3	3 / 12	1 / 2	0 / 0	1 / 2	0 / 0	0 / 0	2 / 4	0 / 0	1 / 4	**15 / 46**