

WIMMERA SOUTHERN MALLEE TOURISM COLLABORATION PLAN

FINAL REPORT

APRIL 2019

WIMMERA DEVELOPMENT ASSOCIATION

Urban Enterprise Urban Planning / Land Economics / Tourism Planning / Industry Software

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CONTENTS

EXECUTIVE SUMMARY	2
PART A. BACKGROUND	5
1. INTRODUCTION	6
1.1. PROJECT BACKGROUND	6
1.2. PROJECT DRIVERS	6
1.3. ABOUT THIS PLAN	6
1.4. METHODOLOGY	6
1.5. STRATEGIC CONTEXT	10
2. WSM PROFILE	11
2.1. REGIONAL CONTEXT	11
2.2. VISITOR PROFILE	14
3. GRAMPIANS	24
3.1. VISITOR EXPERIENCE AND PRODUCT PROFILE	25
3.2. VISITOR PROFILE	32
3.3. ECONOMIC PROFILE	38
3.4. COMMUNITY PROFILE	40
3.5. VISITOR SERVICING	41
3.6. MARKET RESEARCH	46
4. WIMMERA MALLEE	51
4.1. KEY FINDINGS	52
4.2. GOVERNANCE	52
4.3. STRATEGIC CONTEXT	52
4.4. VISITOR EXPERIENCE AND PRODUCT PROFILE	55
4.5. VISITOR PROFILE	64
4.6. VISITOR DEMOGRAPHICS	68
4.7. ECONOMIC PROFILE	71
4.8. COMMUNITY PROFILE	74
4.9. VISITOR SERVICING	75
4.10. MARKET RESEARCH	77
5. GOVERNANCE FRAMEWORK	82
5.1. INTRODUCTION	82
5.2. EXISTING GOVERNANCE ARRANGEMENTS	82
5.3. ASSESSMENT CRITERIA	83
5.4. RECOMMENDATIONS	84
PART B. STRATEGIC DEVELOPMENT FRAMEWORK	85
6. WSM STRATEGIC CONSIDERATIONS & DIRECTIONS	86
6.1. INTRODUCTION	86
6.2. SWOT ANALYSIS	86
6.3. STRATEGIC CONSIDERATIONS	90
6.4. PROJECT ASSESSMENT AND DEVELOPMENT	93
6.5. PROJECT OPPORTUNITIES	96
6.6. POTENTIAL PROJECTS SUMMARY	98
7. GRAMPIANS REGION	101
7.1. INTRODUCTION	101
7.2. POTENTIAL PRIORITY PROJECTS	101
7.3. POTENTIAL PROJECTS SUMMARY	103
8. WIMMERA MALLEE REGION	108
8.1. POTENTIAL PRIORITY PROJECTS	108
8.2. POTENTIAL PROJECTS SUMMARY	110
APPENDIX A POLICY KEY ACTIONS AND PROJECTS SUMMARY	116

APPENDIX B DETAILED VISITOR PROFILE	124	FIGURE 16 NUMBER OF BUSINESSES BY TYPE BY LGA	39
8.3. VISITATION	124	FIGURE 17 HORSHAM TOURISM RELATED BUSINESSES BY LOCATION (#)	39
8.4. VISITOR DEMOGRAPHICS	127	FIGURE 18 NTH GRAMPIANS TOURISM RELATED BUSINESSES BY LOCATION (#)	39
8.5. DOMESTIC VISITOR DEMOGRAPHICS COMPARISON	133	FIGURE 19 GRAMPIANS VIC WALK IN VISITATION TREND 2014 TO 2018	42
APPENDIX C CONSULTATION SUMMARY	136	FIGURE 20 HALLS GAP VIC EXPENDITURE	43
8.6. KEY FINDINGS	136	FIGURE 21 VIC DELIVERY COST PER WALK IN VISITOR	44
8.7. LGA SURVEY	136	FIGURE 22 NUMBER OF TIMES VISITED BY %	46
APPENDIX D MARKET RESEARCH SURVEY	145	FIGURE 23 TIME OF LAST VISIT BY %	46
APPENDIX E TOURISM BUSINESS CATEGORISATION	147	FIGURE 24 PURPOSE OF LAST VISIT	47
APPENDIX F GRAMPIANS LOCAL IMPACT PROJECTS	149	FIGURE 25 INTENTION TO VISIT THE GRAMPIANS	47
APPENDIX G WIMMERA MALLEE LOCAL IMPACT PROJECTS	155	FIGURE 26 PROPORTION OF VISITORS WHO WOULD RECOMMEND THE REGION TO FAMILY/FRIENDS	48
		FIGURE 27 WHAT IS UNIQUE ABOUT THE REGION	48
		FIGURE 28 PRODUCT/EXPERIENCE THAT WOULD MOST MOTIVATE VISITATION BY %	49
		FIGURE 29 PRODUCT/EXPERIENCE THAT WOULD MOST MOTIVATE VISITATION - HAD/HAD NOT VISITED COMPARISON BY NUMBER OF RESPONSES	50
FIGURES		FIGURE 30 TOTAL MOTIVATION OF PRODUCTS/EXPERIENCES BY NUMBER OF RESPONDENTS	50
FIGURE 1 WSMRP CONTEXT – LOCAL GOVERNMENT AREA ALIGNMENT	7	FIGURE 31 WIMMERA MALLEE	51
FIGURE 2 TRANSPORT INFRASTRUCTURE OVERVIEW	12	FIGURE 32 SOUTH WEST WIMMERA WETLAND SYSTEM	58
FIGURE 3 WSM DOMESTIC VISITATION 2008-2017	15	FIGURE 33 DOMESTIC VISITATION TREND 2008-2017	65
FIGURE 4 ADDITIONAL DOMESTIC VISITORS 2008-2017 BY PURPOSE	16	FIGURE 34 DOMESTIC VISITATION TREND 2008-2017	65
FIGURE 5 WSM INTERNATIONAL VISITATION 2008-2017	17	FIGURE 35 10 YEAR AVERAGE BY LGA	66
FIGURE 6 WSM VISITOR PROJECTION TO 2026	18	FIGURE 36 WIMMERA MALLEE VISITOR PROJECTION	67
FIGURE 7 TOTAL VISITATION BY SUB-REGION	19	FIGURE 37 INDUSTRY SECTORS BY NUMBERS OF JOBS AND %	71
FIGURE 8 DAYTRIP VISITATION BY SUB-REGION	20	FIGURE 38 NUMBER OF BUSINESSES BY TYPE BY LGA	72
FIGURE 9 OVERNIGHT VISITATION BY SUB-REGION	20	FIGURE 39 BULOKE TOURISM RELATED BUSINESSES BY LOCATION (#)	72
FIGURE 10 GRAMPIANS	24	FIGURE 40 YARRIAMIACK TOURISM RELATED BUSINESSES BY LOCATION (#)	73
FIGURE 11 DOMESTIC VISITATION TREND 2008-2017	32		
FIGURE 12 INTERNATIONAL VISITATION TREND 2008-2017	33		
FIGURE 13 LGA VISITATION - 10 YEAR AVERAGE	33		
FIGURE 14 GRAMPIANS VISITOR PROJECTION	34		
FIGURE 15 INDUSTRY JOBS AND % BY PLACE OF WORK	38		

FIGURE 41 WEST WIMMERA TOURISM RELATED BUSINESSES BY LOCATION (#)	73	FIGURE 68 OVERNIGHT VISITOR TRANSPORT METHOD	132
FIGURE 42 NUMBER OF TIMES VISITED BY %	77	FIGURE 69 INTERNATIONAL VISITOR TRANSPORT METHOD	133
FIGURE 43 TIME OF LAST VISIT BY %	77	FIGURE 70 BARRIERS TO TOURISM GROWTH BY NUMBER OF RESPONDENT	137
FIGURE 44 PURPOSE OF LAST VISIT	78	FIGURE 71 TOP TOURISM INDUSTRY BARRIERS RANKED (1 = GREATEST BARRIER) BY NUMBER OF RESPONSES	137
FIGURE 45 INTENTION TO VISIT THE WIMMERA MALLEE REGION	78	FIGURE 72 VISITOR MARKET GROWTH OVER THE LAST 5 YEARS BY NUMBER OF RESPONSES	138
FIGURE 46 PROPORTION OF VISITORS WHO WOULD RECOMMEND THE REGION TO FAMILY/FRIENDS	79	FIGURE 73 GREATEST TOURISM STRENGTH BY LGA	139
FIGURE 47 WHAT IS UNIQUE ABOUT THE REGION	79	FIGURE 74 RANKED PRODUCT DEVELOPMENT THEMES	140
FIGURE 48 PRODUCT/EXPERIENCE THAT WOULD MOST MOTIVATE VISITATION BY %	80	FIGURE 75 GREATEST OPPORTUNITY FOR TOURISM INDUSTRY GROWTH BY NUMBER OF RESPONDENTS	141
FIGURE 49 PRODUCT/EXPERIENCE THAT WOULD MOST MOTIVATE VISITATION - HAD/HAD NOT VISITED COMPARISON BY NUMBER OF RESPONSES	81	FIGURE 76 EXISTING ACCOMMODATION DEMAND	142
FIGURE 50 TOTAL MOTIVATION OF PRODUCTS/EXPERIENCES BY NUMBER OF RESPONDENTS	81	FIGURE 77 TYPE OF TRIP UNDERTAKEN BY % OF RESPONDENTS	145
FIGURE 51 STRATEGIC DEVELOPMENT FRAMEWORK	93	FIGURE 78 VISITED VS INTENTION TO VISIT BY REGION	146
FIGURE 52 REGIONAL VICTORIA FORECASTS BY PURPOSE OF VISIT	124		
FIGURE 53 DOMESTIC OVERNIGHT VISITORS LENGTH OF STAY	124	TABLES	
FIGURE 54 DAYTRIP SEASONALITY	125	TABLE 1 EXPERIENCE STRENGTHS	3
FIGURE 55 OVERNIGHT SEASONALITY	125	TABLE 2 WSM SUB-REGIONS	6
FIGURE 56 INTERNATIONAL VISITOR LENGTH OF STAY	126	TABLE 3 EXISTING RAIL CONNECTIVITY BY LGA	13
FIGURE 57 INTERNATIONAL VISITATION BY SUB-REGION	126	TABLE 4 WSM GROWTH IN DOMESTIC DAYTRIP VISITORS BY PURPOSE	16
FIGURE 58 INTERNATIONAL VISITOR PURPOSE OF VISIT	127	TABLE 5 WSM GROWTH IN DOMESTIC OVERNIGHT VISITORS BY PURPOSE	16
FIGURE 59 DAYTRIP VISITOR ORIGIN	127	TABLE 6 INTERNATIONAL VISITOR ORIGIN	17
FIGURE 60 OVERNIGHT VISITOR ORIGIN	127	TABLE 7 VISITATION BY SUB-REGION - 2017	19
FIGURE 61 DOMESTIC VISITOR AGE PROFILE	128	TABLE 8 DAYTRIP LOCAL EXPENDITURE SUMMARY	21
FIGURE 62 INTERNATIONAL VISITOR AGE PROFILE	128	TABLE 9 DAYTRIP SPEND PER VISITOR	21
FIGURE 63 OVERNIGHT VISITOR ACCOMMODATION TYPE	130	TABLE 10 OVERNIGHT LOCAL EXPENDITURE SUMMARY	21
FIGURE 64 INTERNATIONAL VISITOR ACCOMMODATION TYPE	131	TABLE 11 IDENTIFIED EVENTS BY LGA	29
FIGURE 65 OVERNIGHT VISITOR TRAVEL PARTY TYPE	131	TABLE 12 IDENTIFIED ACCOMMODATION IN KEY TOWNSHIPS BY LGA	30
FIGURE 66 INTERNATIONAL VISITOR TRAVEL PARTY TYPE	132	TABLE 13 AIRBNB PROPERTY CHARACTERISTICS BY LGA	31
FIGURE 67 DAYTRIP VISITOR TRANSPORT METHOD	132	TABLE 14 LGA DOMESTIC DAYTRIP AND OVERNIGHT VISITOR DEMOGRAPHIC KEY INDICATORS	36

TABLE 15 KEY STATISTICS BY LGA	40
TABLE 16 POPULATION OF KEY TOWNS	40
TABLE 17 CAPTURE RATE BY VIC 2017/18	43
TABLE 18 POTENTIAL DEMAND BASED ON PREFERRED INFORMATION SOURCE	45
TABLE 19 KEY EVENTS BY LGA	60
TABLE 20 AIRBNB PROPERTY CHARACTERISTICS BY LGA	61
TABLE 21 IDENTIFIED ACCOMMODATION IN KEY TOWNSHIPS BY LGA	62
TABLE 22 LGA DOMESTIC DAYTRIP AND OVERNIGHT VISITOR DEMOGRAPHIC KEY INDICATORS	69
TABLE 23 KEY STATISTICS BY LGA	74
TABLE 24 POPULATION OF KEY TOWNSHIPS	74
TABLE 25 POTENTIAL DEMAND BASED ON PREFERRED INFORMATION SOURCE	76
TABLE 26 SUMMARY OF GOVERNANCE MODEL OPTIONS	83
TABLE 27 ASSESSMENT OF GOVERNANCE MODEL OPTIONS	83
TABLE 28 IDENTIFIED STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS FOR THE WSM TOURISM INDUSTRY	87
TABLE 29 TOP DAYTRIP VISITOR ACTIVITIES	129
TABLE 30 TOP OVERNIGHT VISITOR ACTIVITIES	129
TABLE 31 TOP INTERNATIONAL VISITOR ACTIVITIES	130
TABLE 32 DEMOGRAPHIC KEY INDICATOR COMPARISON - SUB-REGIONS	134
TABLE 33 EXISTING PRODUCT STRENGTHS BY LGA	139
TABLE 34 CONSULTATION WORKSHOPS FINDINGS SUMMARY	143

ACRONYMS

ARCC – Ararat Rural City Council

BSC – Buloke Shire Council

DELWP – Department of Environment, Land, Water and Planning

DMP – Destination Management Plan

DoT – Department of Transport

GPT – Grampians Peaks Trail

GT – Grampians Tourism

HRCC – Horsham Rural City Council

HSC – Hindmarsh Shire Council

IVS – International Visitor Survey

LGA – Local Government Area

NBN – National Broadband Network

NGSC – Northern Grampians Shire Council

NVS – National Visitor Survey

PSC – Pyrenees Shire Council

PV – Parks Victoria

RDV – Regional Development Victoria

RRV – Regional Roads Victoria

RTB – Regional Tourism Board

RTO – Regional Tourism Organisation

SGSC – Southern Grampians Shire Council

TRA – Tourism Research Australia

WDA – Wimmera Development Association

WMT – Wimmera Mallee Tourism

WSM – Wimmera Southern Mallee

WWSC – West Wimmera Shire Council

YSC – Yarriambiack Shire Council

GLOSSARY OF TERMS

Wimmera Southern Mallee Regional Partnership Region – the geographical context covered by the Wimmera Southern Mallee Regional Partnership which includes the Local Government Areas of: Hindmarsh Shire; Horsham Rural City; Northern Grampians Shire; West Wimmera Shire and Yarriambiack Shire

Grampians RDV Region – the geographical context covered by the Grampians RDV Region, which includes the Local Government Areas of: Hindmarsh Shire; Horsham Rural City; Northern Grampians Shire; West Wimmera Shire; Yarriambiack Shire; Ararat Rural City; Pyrenees Shire; Ballarat City; Hepburn Shire; Moorabool Shire; and Golden Plains Shire.

Domestic day trip visitors – Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

Domestic overnight visitors – People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

International visitor – A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.

EXECUTIVE SUMMARY

OVERVIEW

The Wimmera Southern Mallee Regional Partnership (WSMRP), in consultation with the wider community, identified a series of regional priorities as a result of the Regional Assemblies held in Horsham in October 2016 and August 2017. At both assemblies supporting a vibrant tourism industry and enhancing the region's economic diversity were identified as community priorities.

Urban Enterprise was commissioned by Wimmera Development Association (WDA) on behalf of the Wimmera Southern Mallee Regional Partnership to undertake the Wimmera Southern Mallee Tourism Collaboration and Destination Management Plan. As a result of this process, a Tourism Collaboration Plan was developed for the Wimmera Southern Mallee Partnership region and a subsequent Destination Management Plan for the Wimmera Mallee region.

The Wimmera Southern Mallee Tourism Collaboration Plan provides a background analysis and tourism product and governance recommendations for the Wimmera Southern Mallee Regional Partnership region. This includes the two distinct tourism sub-regions which the Regional Partnership region intersects, the Grampians and the Wimmera Mallee, which combined form the Wimmera Southern Mallee Region.

Importantly, this analysis provides the foundation for development of the subsequent inaugural Wimmera Mallee Destination Management Plan, which will provide an important strategic framework for tourism development within the Wimmera Mallee region.

The document includes identification of potential projects for the Grampians Region, however these will be further refined through the development of a Destination Management Plan for Grampians Tourism in the near future. The potential projects identified in this report for the Grampians are opportunities only and will be taken into consideration in subsequent work to be undertaken by Grampians Tourism.

THE WIMMERA SOUTHERN MALLEE REGION

The Wimmera Southern Mallee region is a diverse and expansive region located in western Victoria and extending to the South Australian Border. It includes five Local Government Areas which comprise the WSMRP region, and three aligned Local Government Areas which are also within the footprint of the two bodies which govern the region from a tourism perspective, Grampians Tourism, and Wimmera Mallee Tourism.

The largest town in the region is Horsham, which lays geographically at the regions centre and is the key industry and population hub for the region. Defining signature nature based experiences of the region include Grampians National Park; Wimmera River; Lake Tyrrell; Mount Arapiles-Tooan State Park; Wyperfeld National Park; Wimmera wetland system; Big Desert Wilderness Park; and Little Desert National Park. The Silo Art Trail is another feature of the region which has strengthened the Wimmera Mallee brand and provides a compelling signature experience.

Due to the large geographic size of the region, diversity of product and varying visitor markets, it is necessary to provide analysis and strategic direction at the sub-regional level. For the purpose of this project, the study area has been broadened into two 'sub-regions' in line with existing product synergies and the two regional tourism boards/organisations which currently govern the area.

GRAMPIANS PROFILE

The Grampians includes the Local Governments of Horsham, Northern Grampians, Southern Grampians and Ararat, with key centres including Ararat, Hamilton and Horsham with a number of tourism villages throughout the region including Pomonal, Halls Gap, Wartook, Dunkeld and Natimuk.

The region includes one of Victoria's most visited National Parks – The Grampians, and the signature product strength of the region is nature based tourism, however the region is also well regarded for wine, Indigenous tourism, road cycling, arts, culture and heritage.

Whilst the nature based assets of the Grampians include some of the most scenic National and State Parks in Victoria, there remains opportunity for further investment

including infrastructure to improve the visitor experience of nature based assets, and additional private sector investment in quality and contemporary accommodation, food, beverage and tour operators. Overall the tourism industry accounts for an estimated 1387 jobs across the Grampians, or 5% of total industry jobs.

WIMMERA MALLEE PROFILE

The Wimmera Mallee is bounded by the Grampians to the south, the Mallee to the north and the South Australian border to the west. The Wimmera Mallee historically has had attracted little investment in tourism and has largely leveraged from its nature based assets and visitors touring through the region. The development of the Silo Art Trail and emergence of Lake Tyrrell has created two internationally renowned assets for the Wimmera Mallee which have led to increased visitation.

The Wimmera Mallee will need to continue to build its industry base to service tourism growth leveraging from the Silo Art Trail and Lake Tyrrell. In addition to this there is a need for greater investment in tourism product that leverages from the nature based assets in the region, and within the villages and townships of the region. Overall the tourism industry currently accounts for an estimated 324 jobs across the Wimmera Mallee, or 4% of total industry jobs.

PRODUCT STRENGTHS

The WSM has a number of strengths that define perceptions of tourism product across the region. Table 1 provides an overview of key strengths for the wider WSM region, and the two sub-regions within it.

Across the whole region, Nature & Parks and the associated strength of Sport & Recreation, were identified as the primary product strengths.

TABLE 1 EXPERIENCE STRENGTHS

	GRAMPIANS	WIMMERA MALLEE	WSM
Events & Festivals	●	●	●
Arts & Culture	●	●	●
History & Heritage	●	●	●
Sport & Recreation	●	●	●
Nature & Parks	●	●	●
Rivers & Waterways	●	●	●
Dining & Local Produce	●		
Wine, Brewing, Distilling	●	●	●
	● PRIMARY	● SECONDARY	● EMERGING

STRATEGIC DEVELOPMENT FRAMEWORK FOR WIMMERA SOUTHERN MALLEE

A set of 9 strategic development themes were developed in response to the key issues and opportunities identified for the region, with each including a range of product, infrastructure, experience and strategy based projects and initiatives.

- **Theme 1: Touring** – Development of touring product and awareness which will encourage visitors to explore the region and capitalise on the region's expanse and diversity of product, landscape and experiences
- **Theme 2: Nature-Based & Water** – Development, enhancement and activation of the regions iconic and diverse nature assets and waterways, including Improving awareness and visitor experience to support increased activation and use
- **Theme 3: Indigenous Tourism** – Leverage the strong Indigenous cultural heritage through interpretation and sensitive development led by the Indigenous community
- **Theme 4: Arts, Culture & Heritage** – Capitalise on the region's unique heritage assets and emerging arts and culture scene
- **Theme 5: Wine, Food and Agritourism** – Build on the regions existing food and wine strengths to support visitation and develop signature product in key destinations
- **Theme 6: Events and Festivals** – Develop new and expand existing festivals and events to encourage off season visitation to the region, dispersal through the region, build regional awareness and provide social benefits for the local community
- **Theme 7: Accommodation** – Review of the current accommodation offer and development of contemporary motivating product to better support current visitation and the developing experiences within the region
- **Theme 8: Infrastructure** – Identify key infrastructure projects required to support and grow tourism development across the region
- **Theme 9: Strategic Positioning, Industry Capacity Development & Tourism Governance** – Improve visitor readiness and servicing across the region through industry capacity development, improved tourism governance and

identifying linkage and positioning opportunities that will drive tourism development and visitation in the region

WIMMERA SOUTHERN MALLEE PRIORITY PROJECTS

The following are cross regional priority projects that should be supported at the Wimmera Southern Mallee level. These support tourism across both the Grampians and Wimmera Mallee.

- WSM Accommodation Gap Analysis and Opportunities Study and Accommodation Investment Procurement;
- Melbourne to Adelaide Inland Touring Route Development;
- WSM Indigenous Capacity Building Program; and
- WSM Farm to Plate Program.

Priority projects for the Wimmera Mallee are included in further detail in the Wimmera Mallee Destination Management Plan.

Priority Projects for the Grampians are included in the existing Destination Management Plan, with a subsequent update to be prepared in the near future.

PART A BACKGROUND

An aerial photograph of a desert landscape, likely in the United Arab Emirates, showing a winding road and a small town. The terrain is arid and sandy, with some greenery visible in the lower-left quadrant. The overall color palette is dominated by warm, earthy tones.

1. INTRODUCTION

1.1. PROJECT BACKGROUND

The Wimmera Southern Mallee Regional Partnership (WSMRP), in consultation with the wider community identified a series of regional priorities as a result of the Regional Assemblies held in Horsham in October 2016 and August 2017. At both assemblies supporting a vibrant tourism industry and enhancing the region’s economic diversity were identified as community priorities.

Funding was received through the 2017-18 Victorian State Budget to develop a tourism plan for the Wimmera Southern Mallee (WSM) to boost visitors and diversify the economy. Wimmera Development Association (WDA), on behalf of the WSMRP, commissioned Urban Enterprise in April 2018 to undertake a Tourism Collaboration and Destination Management Plan (DMP) for the WSM region as a result of this process.

1.2. PROJECT DRIVERS

Development of the WSM Tourism Collaboration Plan and Wimmera Mallee DMP have been guided by the following two overarching objectives, identified at the outset of the project:

- **Governance Model** - Determine the most appropriate, viable and sustainable tourism governance model and structure for the WSM region, to better support the need for industry development, product development and coordinated regional marketing;
- **Tourism Collaboration Plan** – Develop a Tourism Collaboration Plan for the WSM to identify key issues, opportunities and project opportunities; and
- **Destination Management Plan** - Develop a DMP for the Wimmera Mallee region to determine the specific products, infrastructure and marketing needed to further drive tourism in the WSM.

1.3. ABOUT THIS PLAN

This Collaboration Plan includes all research, analysis and potential projects for tourism growth and development in the WSM Region. Specifically it identifies key cross regional projects for consideration by the WSMRP and also other project opportunities for Wimmera Mallee Tourism (WMT) and Grampians Tourism (GT).

The document includes identification of potential projects for the Grampians Region, however these will be further refined through the development of an updated DMP for GT in the near future. A DMP for WMT has been prepared as a key output of this Collaboration Plan. It identifies priority projects to be implemented.

1.4. METHODOLOGY

1.4.1. PROJECT APPROACH

For the purpose of this project, the study area has been broadened into two ‘sub-regions’ to comprise the WSM region, in line with existing product synergies and the two regional tourism boards/organisations which currently govern the area (Table 2). Figure 1 overleaf shows the Local Government Area alignment of the WSMRP Region as compared to the Wimmera Mallee, Grampians, and surrounding tourism governance regions.

TABLE 2 WSM SUB-REGIONS

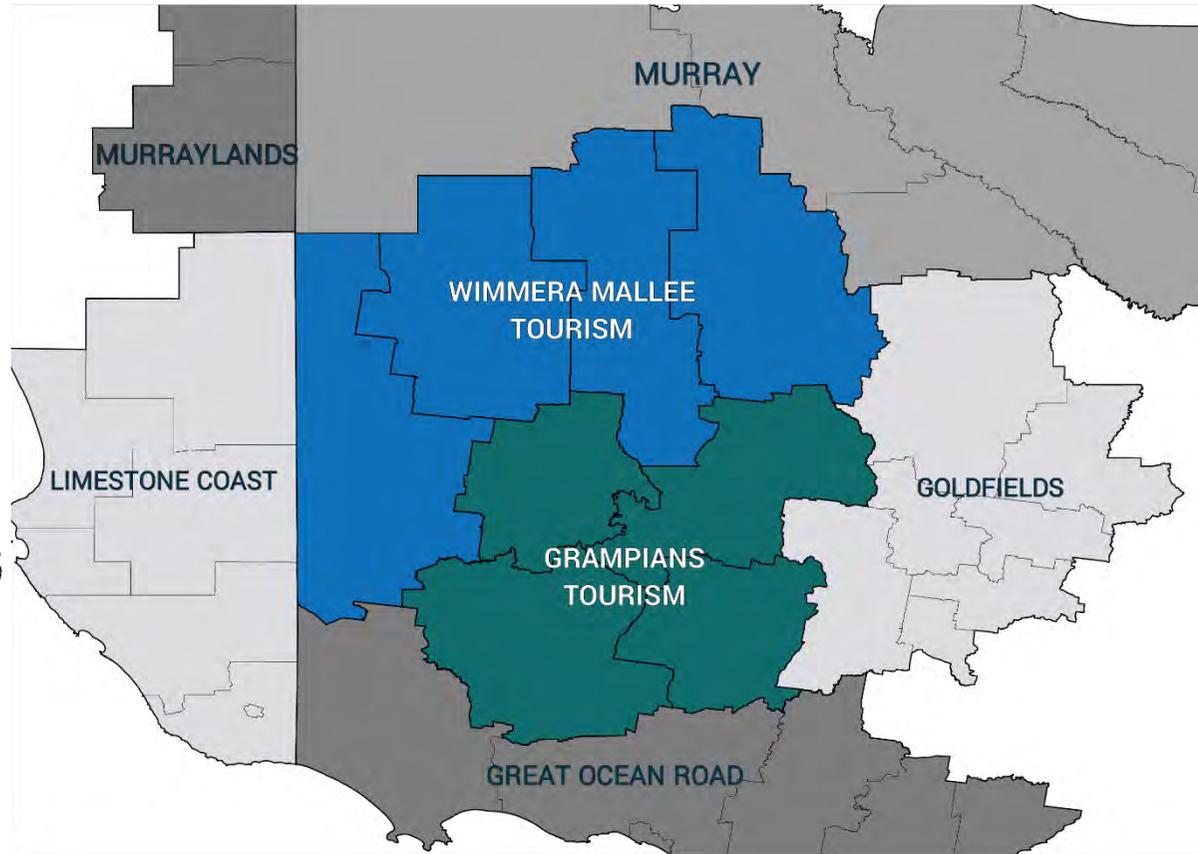
SUB-REGION	GOVERNANCE	WSMRP COUNCILS	ALIGNED COUNCILS
Grampians	Grampians Regional Tourism Board - funded and recognised by Visit Victoria	<ul style="list-style-type: none"> • Horsham • Northern Grampians 	<ul style="list-style-type: none"> • Ararat • Southern Grampians
Wimmera Mallee	Wimmera Mallee Tourism - regional tourism organisation not funded or recognised by Visit Victoria.	<ul style="list-style-type: none"> • Hindmarsh • West Wimmera • Yarriambiack 	<ul style="list-style-type: none"> • Buloke

FIGURE 1 WSMRP CONTEXT – LOCAL GOVERNMENT AREA ALIGNMENT

WSMRP REGION



REGIONAL CONTEXT



1.4.2. PROCESS

1. Background Research and Visitor Data

- Review of relevant policies and strategies.
- Visitor data analysis utilising Tourism Research Australia data (National and International Visitor Survey) and information from Visit Victoria.
- Product and experience review based on desktop analysis and information provided during consultation.
- Economic and Community profile based on desktop analysis
- Governance and visitor servicing assessment based on desktop analysis and information provided during consultation.

2. Consultation and Information Gathering

- In-region consultation in conjunction with Wimmera Development Association in seven strategic locations including separate workshops with government and industry (14 in total). This included:
 - Nhill (22/05/18)
 - Donald (23/05/18)
 - Warracknabeal (29/05/18)
 - Stawell (29/05/18)
 - Ararat (30/05/18)
 - Edenhope (12/06/18)
 - Horsham (12/06/18 & 13/06/18)
 - Kaniva (18/06/18)

Over 100 stakeholders attended the workshops, with phone consultations also conducted with key Council and industry representatives who could not attend scheduled workshops.

2. Consultation and Information Gathering

In-region or phone workshops were also held with the following organisations and groups:

- WMT
- Grampians Tourism
- WDA
- RDV – Economic Development (Grampians)
- RDV – Tourism & Investment (Grampians)
- RDV – WSMRP
- RDV – Economic Development (Loddon Mallee); Mallee Regional Partnership
- Parks Victoria – North West District
- Parks Victoria – South West District
- Transport Victoria & VicRoads
- CMA - Wimmera
- Sport & Recreation Victoria
- DELWP
- Visit Victoria
- StawellBiz
- HRBA
- ARBA
- Business Horsham
- East Grampians Tourism Association
- Barengi Gadjin Land Council
- Grampians Arts / ACT Natimuk
- GWMWater

Consultation focused on tourism objectives; visitor markets; issues and barriers; product strengths, gaps, and development; and priorities.

3. Draft Governance Framework

Preparation of a Draft Governance Framework based on background analysis and the consultation sessions, provided to the PCG for review and feedback.

4. Issues & Opportunities Paper including Draft Projects List

Preparation of an Issues & Opportunities Paper based on the background analysis and consultation sessions conducted, incorporating a detailed profile, key strategic considerations and identified project opportunities to date for each sub-region which was provided to stakeholders for review and feedback.

5. Wimmera Southern Mallee Tourism Collaboration Plan

Development of an overarching WSM Tourism Collaboration Plan including overarching product development themes, priority projects and destination development opportunities at the sub-regional level, and regional positioning projects.

6. Wimmera Mallee Destination Management Plan

Development of the Wimmera Mallee Destination Management Plan specifically for the Wimmera Mallee, including strategic framework, detailed project opportunities and implementation framework.

1.4.3. PLAN LAYOUT

PART A: BACKGROUND

The background section provides a summary of the following:

WSM Profile

- Analysis of visitor trends over the past decade using TRA data; and
- Profile of the regional context of the WSM including identification of cross-border considerations of the region.

Sub-region profiles

- Review of tourism product and visitor experience;
- Visitor profile summary;
- Assessment of the economic impact of the visitor economy;
- Community profile summary; and
- Market research summary.

PART B: STRATEGIC DEVELOPMENT FRAMEWORK

Focuses on the core product development initiatives for the region including:

- An overview of the strategic considerations and directions for the WSM that respond to the needs of the tourism sector;
- A profile of region-wide positioning projects which will strengthen the regional approach to tourism.
- Potential priority project opportunities for both Grampians and Wimmera Mallee regions; and
- A summary of all identified project opportunities.

1.5. STRATEGIC CONTEXT

Urban Enterprise conducted a comprehensive review of the key tourism policy and research documents that provide tourism and economic development direction across the region inform the strategic context of the project; as well as a review of marketing initiatives currently undertaken by Visit Victoria that influence target market attraction at a state level.

This review found that destination development for the Wimmera Southern Mallee Partnership Region is supported by an extensive list of Federal, State, Regional and Local Government policy and strategy documents, with key identified themes including:

- **Asian Markets** – Both the Federal Tourism 2020 Strategy and Victoria Visitor Economy Strategy highlight the need to plan and support Asian visitors which now form the largest international market for Victoria. The DMP needs to understand how to plan and provide visitor destinations that meet the needs and expectations of Asian visitors.
- **Digital** – Digital capability is acknowledged in the Federal Tourism 2020 Strategy and is critical at every level of tourism including research, marketing and visitor services when in the region. Digital excellence should be a key consideration in development of any Destination Management Plan.
- **Nature based** – There are strong levels of strategic policy support for investment and growth in nature based tourism. The Wimmera Southern Mallee has nature based tourism as it's overwhelming key product pillar. The DMP needs to identify investment required to strengthen the access and experience of the nature based offer, and ways for business to better leverage from nature based tourism. Within this nature based tourism, consideration should also be given to cycle tourism and Indigenous tourism.
- **Investment** – Victoria's visitor economy strategy highlights the need to continue to invest in tourism infrastructure and product. The DMP should identify key investment priorities that will grow the visitor economy.
- **Access and transport** – These are a recurring theme in many of the strategic policy documents and there is a need to consider the importance of

accessibility to telecommunications and the delivery of effective transport solutions to cater for the current and future visitor economy.

- **Visitor services** – The rise of digital technology has changed the way that visitors' access and consume information. Delivery of visitor information services must consider the importance of online information.

A summary of relevant key policy actions and projects can be found in Appendix A. The detailed strategic context review can be found in the Issues and Opportunities Paper which preceded this report.



Source: WilLiam Photography, 2017

2. WSM PROFILE

2.1. REGIONAL CONTEXT

2.1.1. INTRODUCTION

The Wimmera Southern Mallee is located in Western Victoria and is bounded by Limestone Coast to the west in South Australia, the Great Ocean Road to the south, the Murray to the north and Goldfields to the east. It includes five Local Government Areas which comprise the WSMRP region, and three aligned Local Government Areas which are also within the footprint of the two bodies which govern the region from a tourism perspective, Grampians Tourism, and Wimmera Mallee Tourism.

It is important for the Tourism Collaboration Plan and subsequent Destination Management Plans to consider how the Wimmera Mallee and Grampians collaborate with neighbouring tourism regions where there is strong existing or potential touring or product links.

2.1.2. GOVERNANCE

There are a number of existing governance arrangements which the WSMRP region falls within, including tourism governance and Regional Development Victoria boundaries.

At a state level, the Visit Victoria Grampians tourism region currently encompasses Ararat Rural City Council (ARCC), Buloke Shire Council (BSC), Hindmarsh Shire Council (HSC), Horsham Rural City Council (HRCC), Northern Grampians Shire Council (NGSC), Southern Grampians Shire Council (SGS), West Wimmera Shire Council (WWSC), and Yarriambiack Shire Council (YSC).

Grampians Tourism Board is the only funded tourism board in this region and currently provides tourism marketing and development for Horsham, Ararat, Northern Grampians and Southern Grampians.

This follows the establishment of Wimmera Mallee Tourism as a separate organisation in 2010, which encompasses the remaining four LGAs of the WSM region: Buloke, Hindmarsh, West Wimmera and Yarriambiack.

The WSRMP region forms part of the larger Grampians RDV region, which also includes the LGAs of Ararat, Pyrenees, Ballarat, Hepburn, Golden Plains, and Moorabool.

The Grampians RDV Region does not include the WSM region LGA's of Buloke (Loddon Mallee Region) and Southern Grampians (Barwon South West Region). Buloke Shire, Southern Grampians Shire and Ararat Shire form part of the Mallee, Great South Coast and Central Highlands Regional Partnerships respectively.

2.1.3. REGIONAL LINKAGES

Tourism regions and LGA's which surround the WSM region (as shown in Figure 1) include:

- Murray (Mildura, Swan Hill; and Gannawarra LGAs);
- Limestone Coast (Wattle Range, Naracoorte and Lucindale; and Tatiara LGAs);
- Goldfields (Loddon, Central Goldfields, and Pyrenees LGAs); and
- Great Ocean Road (Corangamite; Moyne; Glenelg LGAs).

The location of the WSM region presents the opportunity to establish or better develop regional linkages with key surrounding regions which are already well recognised for their tourism offer such as Great Ocean Road or the Goldfields, capitalising on existing product similarities and alliances.

2.1.4. INFRASTRUCTURE & CONNECTIVITY

The following section provides an overview of the existing (and proposed) transport infrastructure within the WSM region, including major roads, airports and train network (Figure 2).

ROADS

There are a number of major highways that service the region including the Borung Highway, Glenelg Highway, Hamilton Highway, Henty Highway, Sunraysia Highway, Western Highway, and the Wimmera Highway.

The Western Highway in particular is the principal road link between Melbourne and Adelaide and is the key transport corridor through Victoria's western district. The highway is currently undergoing a duplication and upgrade process which attracted over half a billion in state government funding to complete the following actions:

- \$672 million for the duplication of the Western Highway between Ballarat and Stawell, including construction to Ararat;
- Almost \$50 million for upgrades between Stawell and the South Australian Border, including new overtaking lanes, rest area improvements, bridge upgrades and planning for a Horsham bypass;
- \$50 million for Beaufort bypass planning; and
- \$50 million for Ararat bypass planning.

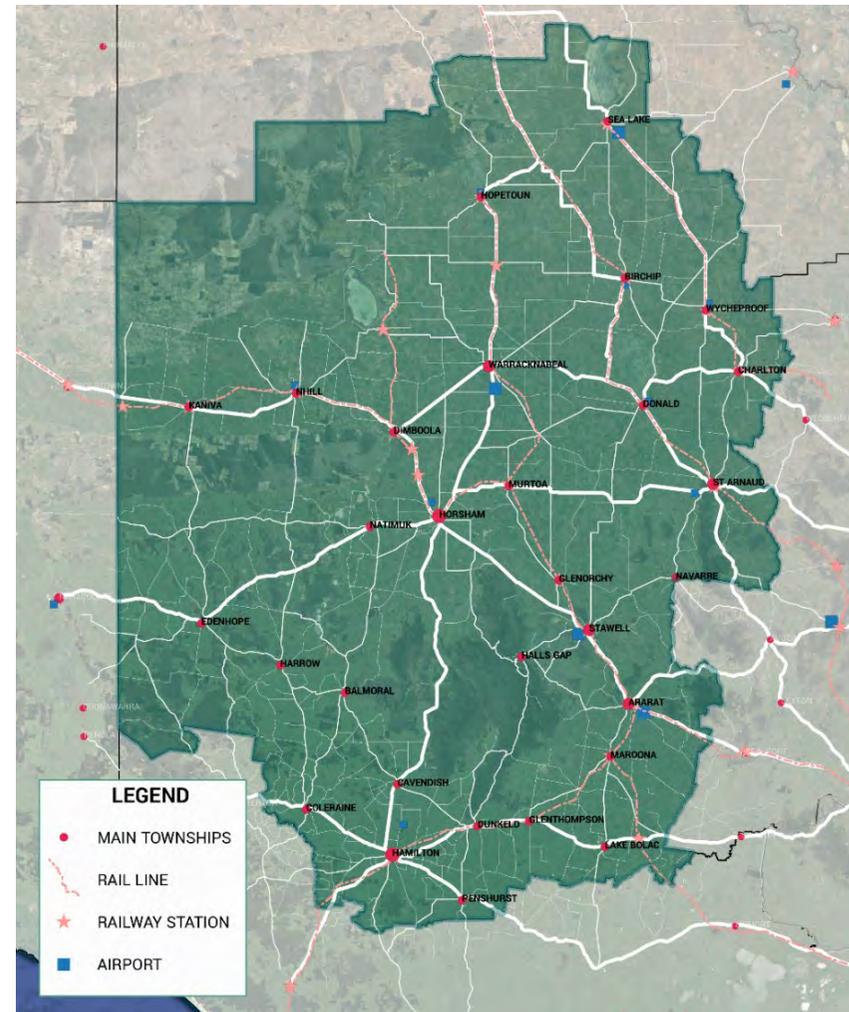
DoT and RRV have engaged a consultant to prepare a new Western Highway Transport Corridor Strategy that will include a review of the entire corridor from Melbourne's western suburbs to the SA border. This work is expected to be completed by mid-2019.

AIRPORTS

There are a number of existing regional airports across the region, including those in the cities/townships of Ararat; Birchip; Donald; Hamilton; Hopetoun; Horsham; Nhill; Sea Lake; St Arnaud; Stawell; Warracknabeal; and Wycheproof; as well as a number

of smaller airports and airstrips across the region. There are currently no passenger services to these sites, however they are used by private charters.

FIGURE 2 TRANSPORT INFRASTRUCTURE OVERVIEW



Source: Urban Enterprise, 2018

TRAIN NETWORK

There is a key gap in passenger rail services across the region, with only Ararat serviced by a V/Line train service (Table 3).

Driven by HRCC, SGSC and ARCC (with support from neighbouring LGAs) the Western Rail Project is identified as critical for the region, with train services in Western Victoria identified as ‘the worst in the state’¹. The project is seeking funding for two key stages, with an estimated total capital cost of \$369.2 million, and operating cost of \$7.5 m p/a. These two stages would see train services established to Horsham and Hamilton, plus improvements to timetabling and coach services within the region

The Overland train, operated by private company Great Southern Rail, also provides a tourist-based rail service between Adelaide and Melbourne stopping at Ararat, Horsham, Stawell, Nhill, and Dimboola. This is a daylight service operating twice weekly in both directions, with a journey time of 10.5 hours. Following the withdrawal of funding by the South Australian Government, funding has now been committed by the Victorian Government which will ensure this service continues in 2019.

TABLE 3 EXISTING RAIL CONNECTIVITY BY LGA

LGA	TOWN	COACH STATION	PASSENGER RAIL
Grampians			
Ararat	Westmere	✓	
	Ararat	✓ **	✓ (Ararat & Overland)
	Moyston	✓	
	Pomonal	✓	
	Streatham	✓	
Horsham	Pimpinio	✓	
	Horsham	✓ *	✓ (Overland)
	Dadswells Bridge	✓	
Northern Grampians	St Arnaud	✓ *	
	Glenorchy	✓ *	
	Stawell	✓ *	✓ (Overland)

¹ <http://westernrail.com.au/>

	Halls gap	✓ *	
	Emu	✓	
	Great western	✓	
	Marnoo	✓	
Southern Grampians	Hamilton	✓ *	
	Dunkeld	✓ *	
	Glenthompson	✓	
	Coleraine	✓	
Wimmera Mallee			
Buloke	Donald	✓	
	Birchip	✓ *	
	Sea lake	✓ ***	
	Watchem	✓	
	Berriwollock	✓ *	
Hindmarsh	Nhill	✓	✓ (Overland)
	Dimboola	✓	✓ (Overland)
	Kiata	✓	
West Wimmera	Kaniva	✓	
	Lillimur	✓	
Yarriambiack	Hopetoun	✓	
	Beulah	✓	
	Warracknabeal	✓ *	
	Murtoa	✓ *	
	Rupanyup	✓ *	
	Lascelles	✓	
	Turriff	✓	
	Speed	✓	
	Roseberry	✓	
	Galaquil	✓	
	Brim	✓	
	Sheep hills	✓	
	Minyip	✓	
	Woomelang	✓	

*Coach interchange

**train/coach interchange

***end of line

2.2. VISITOR PROFILE

2.2.1. INTRODUCTION

This section provides an assessment of the WSM regions' current visitor profile including domestic daytrip and overnight, as well as international visitor markets. Analysis includes key trends in visitation over the past decade and an overview of the visitor demographic profile of the WSM region including the region as a whole and the sub-regions which comprise it, as compared to regional Victoria where appropriate.

NOTES ON ANALYSIS

This assessment draws on data collected by Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS) to analyse trend and demographic data for both domestic and international visitors to the region.

- All LGA visitor and demographic data has been based on the 10-year average from 2008 to 2017 (YE December) due to low sample sizes across some LGAs.
- Expenditure data by item for overnight visitors is only available at a national level, and as such approximate 'local' spend has been calculated by applying the percentage of 'local' spend at a national level to overall visitation and expenditure data available at the tourism region level.
- 'Local' spending is defined as spending on the following items: rental vehicles; petrol; accommodation; groceries for self-catering; alcohol; drinks (not already reported); takeaways and restaurant meals; shopping/ gifts/ souvenirs; entertainment and gambling.
- Percentage figures have been rounded to the nearest whole number and therefore may not equal 100%.

SUMMARY OF VISITATION TO WIMMERA SOUTHERN MALLEE (2017)

1,126,000 DOMESTIC DAYTRIP VISITORS	917,000 DOMESTIC OVERNIGHT VISITORS	34,000 INTERNATIONAL VISITORS
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The Wimmera Southern Mallee Region attracted 2.1 million visitors in 2012, with significantly higher visitation across the Grampians as compared to the Wimmera Mallee.

Overall, visitation has grown to both sub-regions over the past decade, albeit from a smaller base for the Wimmera Mallee, with visitor projections for the region predicting a midpoint scenario of an additional 1 million visitors to the region by 2026.

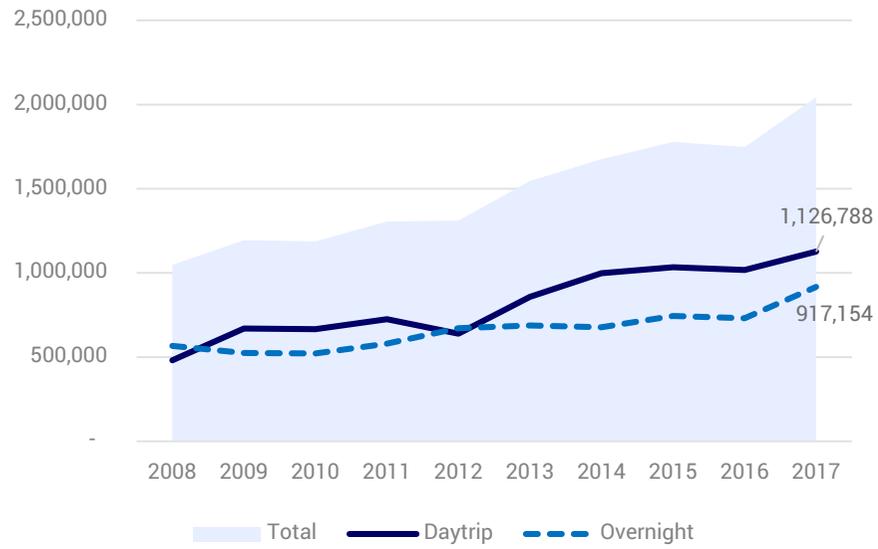
This projected growth highlights the need to deliver infrastructure, experiences, accommodation and product to meet future visitor need.

2.2.2. DOMESTIC VISITATION

During 2017, the WSM region attracted over 2 million visitors, including approximately 2 million domestic visitors. Domestic daytrip visitors comprised 54% of visitors to the region (1.13 million), and overnight visitors comprised 44% (917,154).

Daytrip visitation grew strongly over the past decade with an additional 645,723 visitors between 2008 and 2017 (Figure 3). The region also experienced strong overnight visitation growth, with an additional 350,904 overnight visitors.

FIGURE 3 WSM DOMESTIC VISITATION 2008-2017



Source: TRA NVS & IVS Visitation 2008-2017 calendar YE



Source: TripAdvisor, 2018

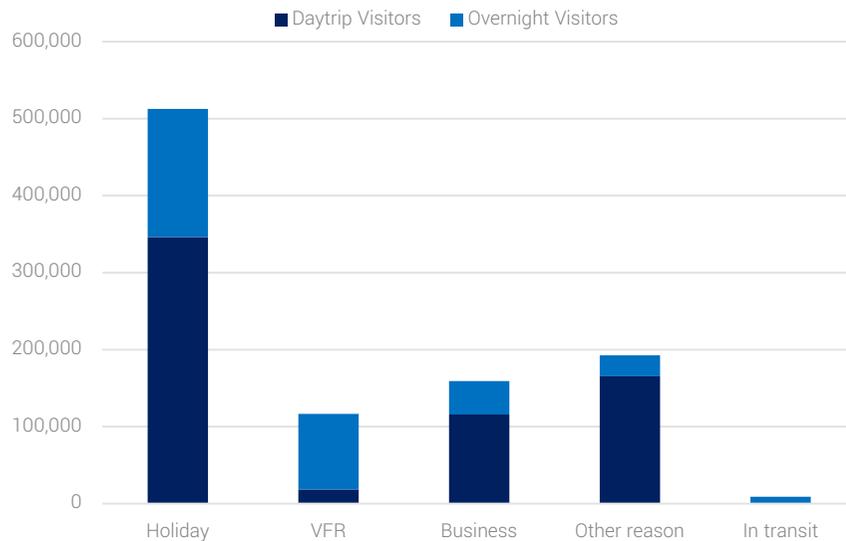
CHANGE IN VISITOR PURPOSE

To understand the drivers influencing visitor growth in the region, trends in domestic visitor purpose were analysed, with the following key changes noted (Figure 4):

- High growth in holiday leisure visitors, particularly for the daytrip market;
- High growth of 'other reason' daytrip visitors, which includes reasons such as shopping, medical appointments, etc; and
- High growth in daytrip business visitors which is presumably linked to Horsham's growing role as a regional business centre.

Tables 4 and 5 provide detailed domestic visitor growth by purpose.

FIGURE 4 ADDITIONAL DOMESTIC VISITORS 2008-2017 BY PURPOSE



Source: TRA NVS Visitation 2008-2017 Calendar YE

TABLE 4 WSM GROWTH IN DOMESTIC DAYTRIP VISITORS BY PURPOSE

PURPOSE	2008 VISITORS	2017 VISITORS	# GROWTH	% GROWTH	AAG %
Holiday	148,431	494,561	+346,129	+233%	13%
VFR	189,105	207,421	+18,315	+10%	1%
Business	65,328	181,143	+115,816	+177%	11%
Other reason	78,200	243,663	+165,462	+212%	12%
Total	481,065	1,126,788	+645,723	+134%	9%

Source: TRA NVS Visitation 2008-2017 Calendar YE. AAG refers to the Average Annual Growth rate over the period 2008 to 2017.

TABLE 5 WSM GROWTH IN DOMESTIC OVERNIGHT VISITORS BY PURPOSE

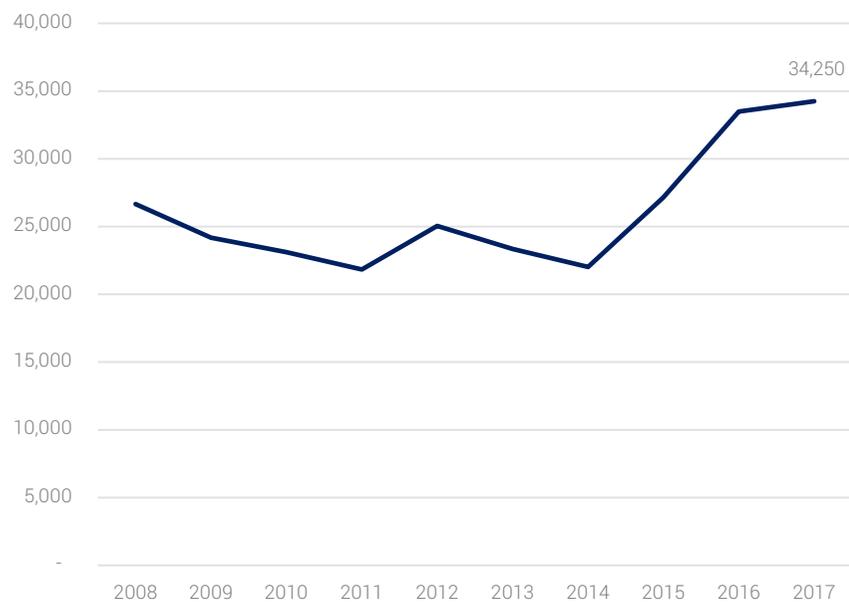
PURPOSE	2008 VISITORS	2017 VISITORS	# GROWTH	% GROWTH	AAG %
Holiday	207,549	374,023	+166,474	+80%	6%
VFR	207,722	306,018	+98,296	+47%	4%
Business	112,490	155,926	+43,435	+39%	3%
Other reason	14,893	42,039	+27,147	+182%	11%
In transit	12,670	21,711	+9,042	+71%	6%
Total	553,917	898,172	+344,255	+62%	5%

Source: TRA NVS Visitation 2008-2017 Calendar YE. AAG refers to the Average Annual Growth rate over the period 2008 to 2017.

2.2.3. INTERNATIONAL VISITATION TRENDS

The WSM region currently receives only a small share of its annual visitation from international visitors (2%), however strong visitor growth has been recorded over the last three years to reach a high of 34,250 international visitors annually in 2017 (Figure 5). Table 6 shows international visitor origin for the WSM region, as compared to Regional Victoria.

FIGURE 5 WSM INTERNATIONAL VISITATION 2008-2017



Source: TRA IVS Visitation 2008-2017 average YE Dec

TABLE 6 INTERNATIONAL VISITOR ORIGIN

ORIGIN	WSM	REGIONAL VICTORIA
United Kingdom	18%	18%
Germany	14%	8%
New Zealand	12%	14%
United States of America	8%	9%
Other Europe	7%	5%
Netherlands	7%	3%
Switzerland	5%	2%
Other Countries	4%	5%
Canada	4%	3%
France	4%	4%
Scandinavia	3%	3%
China	3%	7%
Singapore	2%	3%
Malaysia	2%	3%

Source: TRA IVS Visitation 2008-2017 Calendar YE

2.2.4. VISITOR PROJECTIONS

The following provides an understanding of future visitation growth scenarios, and demand for tourism product across the WSM

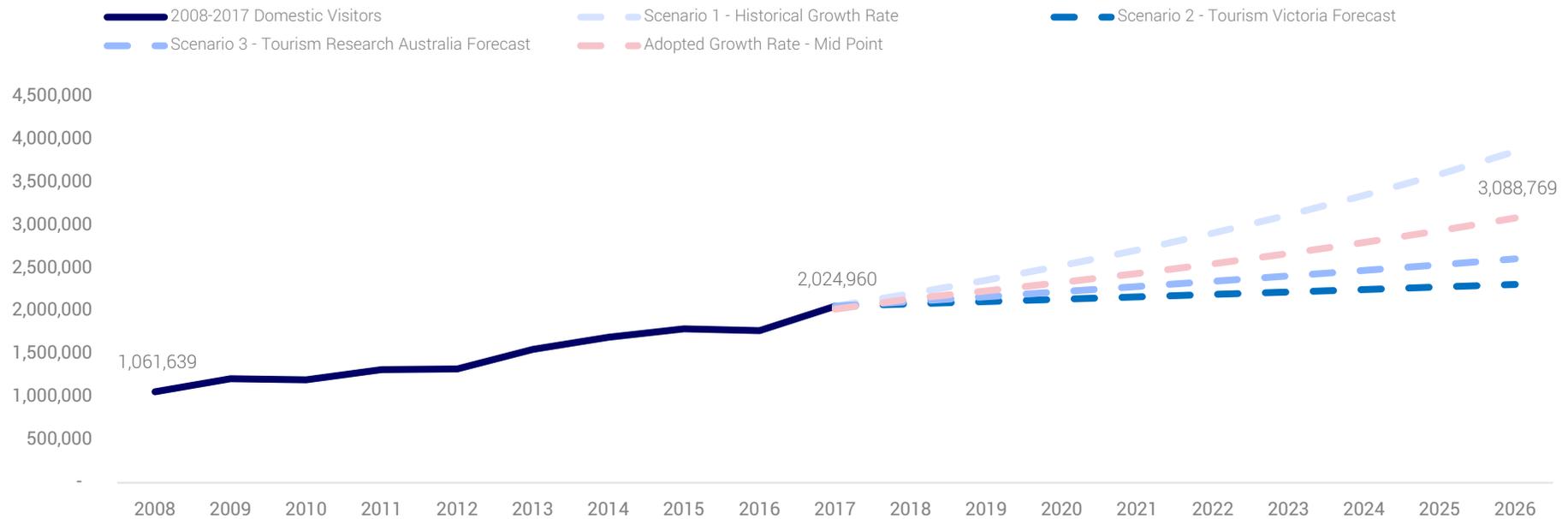
Figure 6 shows the forecast growth scenarios for Wimmera Southern Mallee. This is based on historic growth rate and adopted Tourism Research Australia and Tourism Victoria forecasts.

All scenario's show that the WSM will attract some level of visitation growth over the next 8 years.

Tourism Research Australia forecasts domestic visitation to grow steadily over the coming years based on the likelihood of petrol prices remaining at, or near current levels (reflecting global oil supplies), and the Australian dollar remaining at its long-term average.

Tourism by nature is a competitive industry and those destinations that attract new investment in compelling visitor product and develop successful marketing programs can greatly influence their future in terms of attracting visitation.

FIGURE 6 WSM VISITOR PROJECTION TO 2026



Source: TRA NVS & IVS Visitation; TRA Visitor Forecasts; Tourism Victoria TEVE Research Unit, Forecast visitation to Victoria, August 2017; modelled by Urban Enterprise 2018

2.2.5. WIMMERA SOUTHERN MALLEE SUB-REGIONS

Table 7 and Figure 7 show WSM visitation by sub-region, and identify that overall:

- The Grampians attracts the largest number of visitors in the WSM region, with approximately 1.6 million visitors per annum. The sub-region has the largest population base, with Horsham being the largest regional centre. Over the past decade, the Grampians has grown strongly by an additional 207,829 overnight and 518,194 daytrip visitors.
- Wimmera Mallee attracts just over 480k visitors per annum, whilst this figure is relatively low, it has also shown significant growth across the decade (albeit off a low base), with an additional 143,076 overnight and 127,528 daytrip visitors.

Figures 8 and 9 demonstrate the growth trends of daytrip and overnight visitors to the region between 2008 and 2017 for both sub-regions.

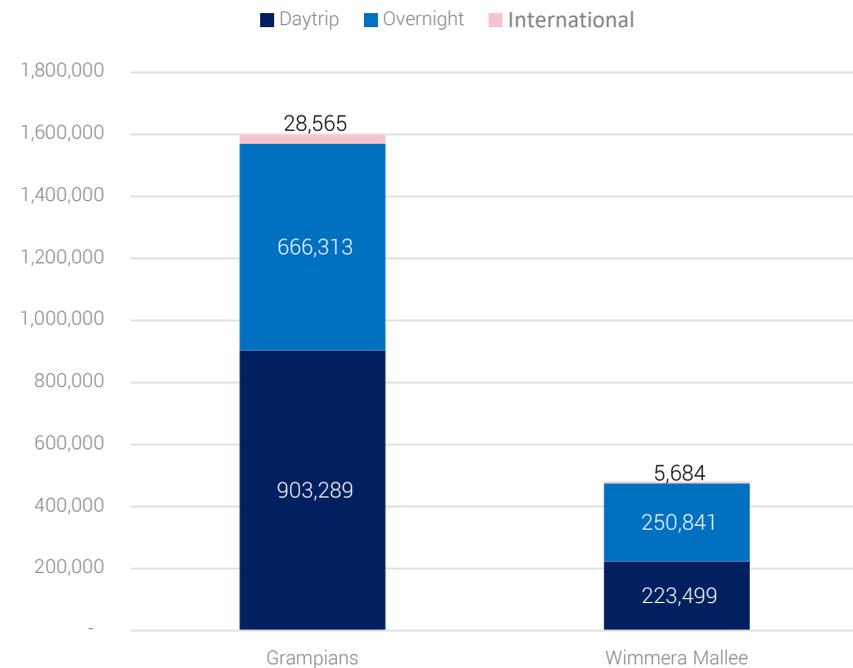
At a sub-regional level, the Grampians currently attracts the largest share of both daytrip and domestic visitors to the WSM region, influenced by its existing natural assets of national significance (The Grampians), product development and marketing. The Grampians has also experienced stronger growth across its daytrip market in particular, more than doubling its number of visitors between 2008 and 2017.

TABLE 7 VISITATION BY SUB-REGION - 2017

	GRAMPIANS	%	WIMMERA MALLEE	%
Daytrip	903,289	57%	223,499	47%
Overnight	666,313	42%	250,841	52%
International	28,565	2%	5,684	1%
Total	1,598,166	100%	480,025	100%

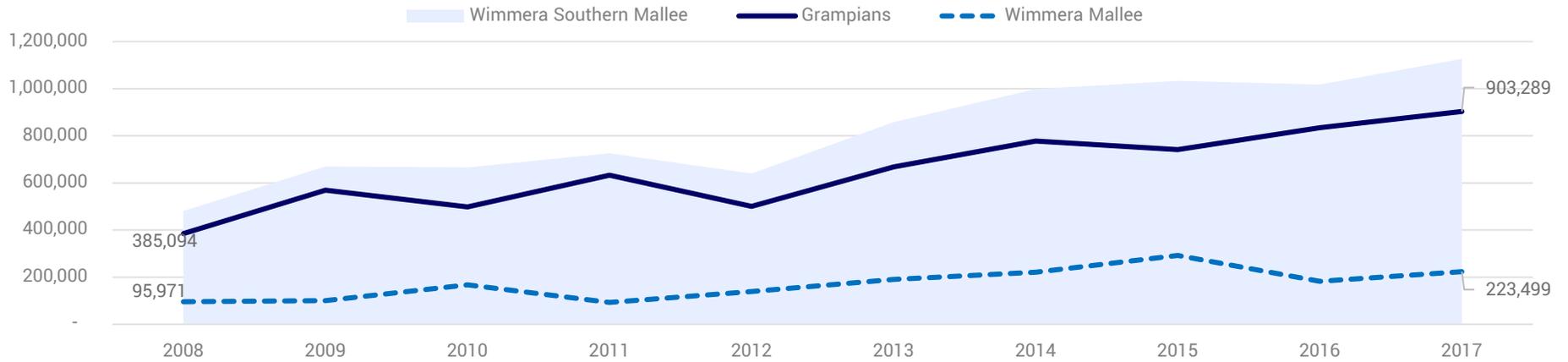
Source: TRA NVS & IVS Visitation 2013 - 2017 YE Dec

FIGURE 7 TOTAL VISITATION BY SUB-REGION



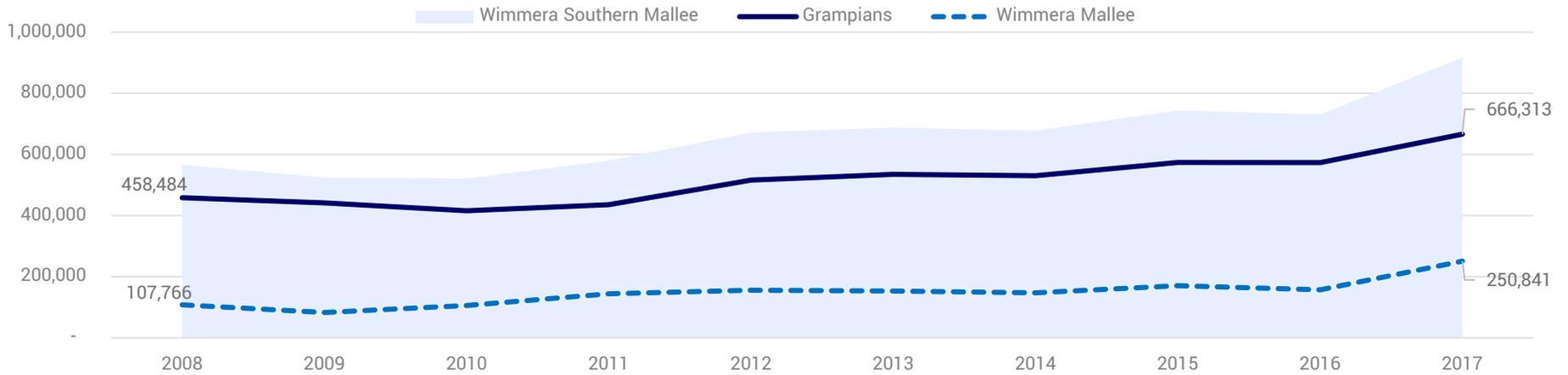
Source: TRA NVS & IVS Visitation -2017 YE Dec

FIGURE 8 DAYTRIP VISITATION BY SUB-REGION



Source: TRA NVS & IVS Visitation 2008-2017 YE Dec

FIGURE 9 OVERNIGHT VISITATION BY SUB-REGION



Source: TRA NVS & IVS Visitation 2008-2017 YE Dec

2.2.6. EXPENDITURE

The following provides an overview of estimated visitor expenditure to the WSM region including a comparison of the Grampians and Wimmera Mallee subregions, across the daytrip, overnight and international visitor markets.

DAYTRIP VISITORS

For 2017, the total local expenditure of daytrip visitors to the WSM region is estimated to equal just over \$110.6 million, or an average of \$98.16 per visitor to the region (Table 8). The majority of this (\$96.6 million) was spent within the Grampians.

TABLE 8 DAYTRIP LOCAL EXPENDITURE SUMMARY

	GRAMPIANS	WIMMERA MALLEE	WSM
Total local expenditure	\$96,630,994	\$13,974,939	\$110,605,932
Per person	\$106.98	\$62.53	\$98.16

Source: TRA NVS Visitor Expenditure, YE Dec 2017

Table 9 details the spend per visitor for daytrip visitors on local expenditure items. Across the region, shopping / gifts / souvenirs recorded the highest total spend for 2017, which is almost wholly attributable to the Grampians where visitors spent on average \$37.7 each compared to only \$4.2 for Wimmera Mallee. This is again reflective of Horsham's role as a major retail centre for the wider region. Petrol was the second highest expenditure item, with the average spend per visitor for this item higher than for the Grampians.

TABLE 9 DAYTRIP SPEND PER VISITOR

	GRAMPIANS	WIMMERA MALLEE	WSM
Shopping / gifts /souvenirs	\$37.69	\$4.19	\$31.05
Petrol	\$23.91	\$28.53	\$24.83
Takeaways and restaurant meals	\$21.81	\$20.60	\$21.57
Groceries for self-catering	\$10.64	\$1.18	\$8.77
Entertainment	\$8.98	\$1.36	\$7.47
Alcohol, drinks (not already reported)	\$3.94	\$6.66	\$4.48

Source: TRA NVS Visitor Expenditure, YE Dec 2017

OVERNIGHT VISITORS

Across the WSM region, overnight visitors spent a total of \$434.5m in 2017, almost 80% of which was spent within the Grampians (Table 10). On average, visitors to the region spent approximately \$499 per person during their visit, and \$198 per night. Spend per visit and per night was higher for the Grampians than for Wimmera Mallee.

TABLE 10 OVERNIGHT LOCAL EXPENDITURE SUMMARY

	GRAMPIANS	WIMMERA MALLEE	WSM
Local Expenditure	\$345,348,327	\$112,036,989	\$457,385,316
Per person	\$518.30	\$446.65	\$498.70
Per Night	\$199.66	\$191.98	\$197.72

Source: TRA NVS Visitor Expenditure, YE Dec 2017

2.2.7. MARKET SEGMENTATION

This section provides a summary of the major existing and target markets for the WSM region, as identified through the visitor profile analysis and consultation.

A range of visitor types are currently important for the WSM region as a whole and for the sub-regions and LGAs within it. Working synergistically across key target markets will allow a more coordinated approach to drive visitor growth and aide greater dispersal of existing Grampians visitors throughout the Wimmera Mallee.

Target markets include:

- Geographical –Victoria (specifically Ballarat and Western Melbourne) and South Australia;
- Psychographic - Lifestyle Leaders including the subsets of Creative Opinion Leaders, Food and Wine Lifestylers, Enriched Wellbeing, and Inspired By Nature; and International Experience Seekers.

EXISTING CORE MARKETS

Intrastate visitation is currently the most significant geographic market for the region with 86% of all daytrip and overnight visitors to WSM originating from within Victoria. The majority of intrastate visitors are local and regional Victorian daytrip visitors, which comprise 60% of intrastate visitors to WSM.

Only 14% of all daytrip visitors and overnight visitors to WSM are interstate visitors, with almost all interstate daytrip visitors from South Australia and overnight visitors originating from primarily South Australia, followed by NSW and Queensland predominantly.

International visitors to WSM currently comprise a low proportion of overall visitors (1.6%). Of international visitors, the majority are from traditional western markets, including the UK and Europe, New Zealand and the USA.

Overall, the generational market profile shows a predominance of visitors who are over 45, across daytrip visitors in particular where 62% of visitors are over 45.

Within both sub-regions the following psychographic, life stage and/or behavioural markets were also identified as key visitor markets: Family Groups, Grey Nomads;

Caravans and Campers; Visiting Friends and Relatives; Young Singles and Couples; International and backpacker; Events Visitors; Working Holiday Visitors; Business Visitors; and Food and Beverage Visitors.

Nature based and adventure tourism, the broader visitor economy (business, education, health); and dark tourism (Ararat), were also identified as key markets by LGAs within the Grampians.

Other important markets identified for the Wimmera Mallee included touring travellers, nature based, commuters/transit visitors; niche events visitors; arts and culture visitors – Silo Art Trail; and international (primarily Asian) visitors - emerging market.

KEY TARGET AND EMERGING MARKETS

GEOGRAPHIC

The WSM region currently receives a comparatively low proportion of its overall visitation from interstate, especially given its proximity to the South Australian border. Raising the awareness of the region and its unique offer will be important to growing this market.

PSYCHOGRAPHIC

Lifestyle leaders

Lifestyle Leaders have been previously identified as a key domestic target market for the Grampians. The 'Lifestyle Leaders' market, developed and targeted by Visit Victoria, is based on a mindset, are found in all regions, ages and lifecycle groups and represent approximately a third of the Australian population aged 18+.

Lifestyle Leaders are educated, professional and progressive individuals who enjoy seeking out new information and being the first to try new products. They have a higher level of discretionary expenditure than the general population, so can afford to indulge more often in travel, with a particular desire to escape city life and embrace nature/outdoors and new discoveries. Compared with the average Australian, Lifestyle Leaders:

- Take a greater number of leisure trips per year (4.2 trips compared to 3.9); and
- Spend more on travelling per year (\$4,058 on average compared to \$3,205)

The Lifestyle Leaders market segmentation model also incorporates four categories of target markets specific to the types of experiences sought within the Lifestyle Leaders market, as outlined below.

Creative Opinion Leaders

Creative Opinion Leaders represent approximately 6% of the total population 18+. They are creative both in terms of their involvement in cultural and creative pursuits and their openness to risks, new experiences and new ideas. Their extensive social networks and extroverted nature means that once they've visited a destination, the latest exhibition or experience, they will generate positive word of mouth among their friends and family.

Food and Wine Lifestylers

Food and Wine Lifestylers represent approximately 13% of the total population 18+. They are a credible authority on eating out and seek to enhance their sophisticated palate and culinary knowledge through an understanding about everything food and wine. In particular they like to get to know the characters and stories behind the food and wine from the winemaker or chef.

Enriched Wellbeing

Enriched Wellbeing represent approximately 7% of the total population 18+. Enriched Wellbeing are progressive, educated and professional individuals who seek luxurious breaks to indulge personal passions within a culturally rich, natural or rejuvenating setting.

Enriched Wellbeing are financially secure, predominately female individuals who earn more and spend more on travel and luxury accommodation. They value quality over

price and seek enrichment and rejuvenation through connecting with nature and focussing on their wellbeing. They appreciate quality and freshness in food and are more likely to buy organic foods, and indulge in premium restaurant experiences which offer fresh, seasonal and regional produce.

Inspired By Nature

Represent approximately 14% of the total population 18+. They regularly get away for weekends and want a choice of activities that allow them to get active to varied degrees, from hiking and cycling to shopping and dining. Their genuine environmental concerns lead them towards preferring an eco-tourism experience where respect for natural surrounds is paramount.

Within this market segment, key subsets which marketing and product development should be targeted to match include:

- **Grampians** – Creative Opinion Leaders, Food and Wine Lifestylers, Inspired by Nature, and Enriched Wellbeing.
- **Wimmera Mallee** – Inspired by Nature

International Experience Seekers

International experience seekers are growing in number in Australia, particularly Asian experience seekers. The Asian markets are travelling further and dispersing more across Victoria, with motivations including interaction with nature, wildlife, heritage and culture.

Whilst international visitors currently comprise a small proportion of total visitors to the region, recent and upcoming large-scale investment projects such as the Grampians Peaks Trail, Silo Art Trail and Lake Tyrrell create significant opportunity to grow this market with appropriate development of supporting products and services.

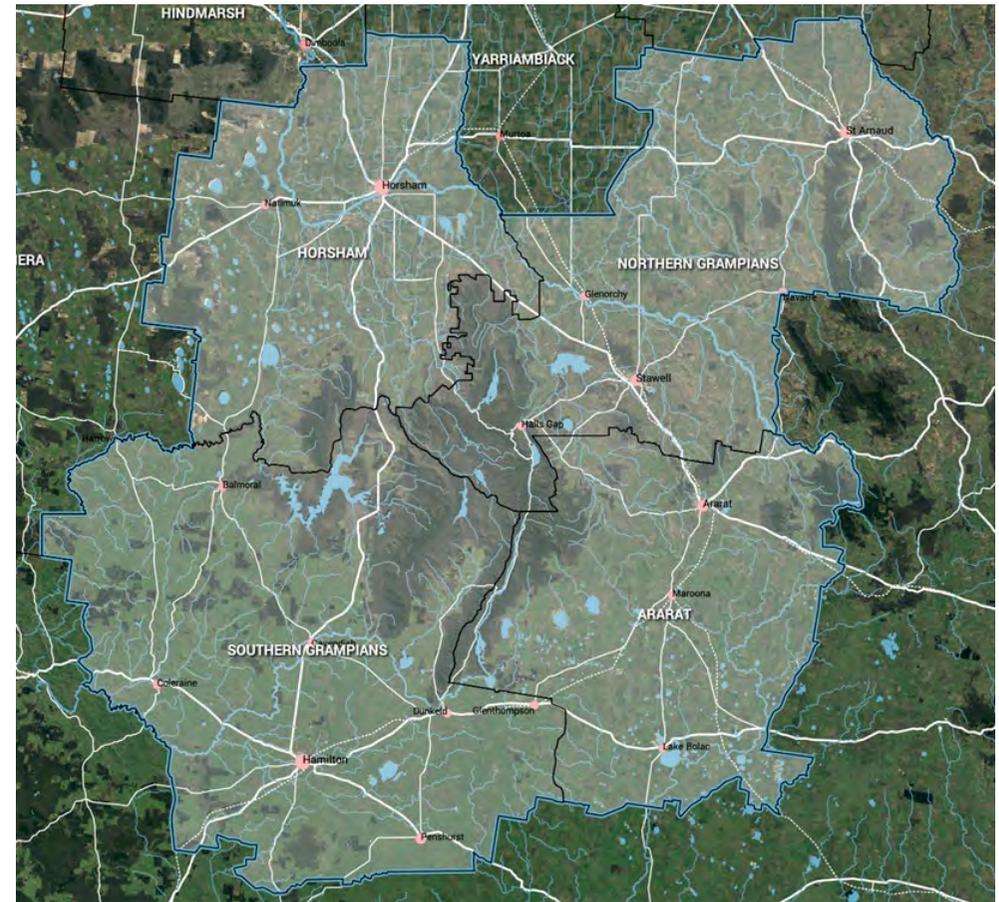
3. GRAMPIANS

The Grampians comprises the southern half of the WSM region and includes the four diverse LGAs of Ararat, Horsham, Northern Grampians and Southern Grampians, interlinked by the Grampians National Park which lies at the regions centre.

- **Ararat** - At just under 2.5 hours or 206kms from Melbourne the city of Ararat provides the gateway into the Grampians Sub-Region, and the wider WSM region, located closest to Melbourne and providing the only V/Line train link to Victoria's Capital. Other key townships in the LGA include Maroona, Lake Bolac and Pomonal.
- **Horsham** -The city of Horsham is the major regional centre of the Grampians Sub-Region, and the wider WSM region, located just under 3.5 hours or 300kms from Melbourne. Other key townships in the LGA include Natimuk and Wartook.
- **Northern Grampians** - Northern Grampians is the tourism epicentre of the region, with Halls Gap township the gateway to the Grampians, and located 3 hours or 255 kms from Melbourne. Stawell is another major township in the LGA, with other key townships including St Arnaud, Glenorchy and Navarre.
- **Southern Grampians** - Southern Grampians plays a key role in connecting the Grampians and the wider WSM to the Great Ocean Road, it's major township of Hamilton located just under 1.25 hours or 100kms from the regional city of Warrnambool. Other key townships include Dunkeld, Cavendish, Coleraine and Balmoral.

Key centres in the region include Ararat, Horsham and Hamilton with a number of tourism villages throughout the region including Pomonal, Halls Gap, Wartook, Dunkeld and Natimuk.

FIGURE 10 GRAMPIANS



Source: Urban Enterprise, 2018

3.1. VISITOR EXPERIENCE AND PRODUCT PROFILE

This section provides an outline of the existing products and experiences across the Grampians that support the visitor economy.

3.1.1. ARTS, CULTURE & HERITAGE

The city of Ararat has a unique and dark history including being home to one of Victoria's largest asylums, Aradale, which operated as a lunatic asylum from 1867 to 1993, as well J-ward, Ararat's Old Gaol and Lunatic Asylum which became home to the criminally insane. Both facilities now offer guided tours/ghost tours. J-Ward also has a museum and offers venue and events hire (including an optional commercial kitchen space).

Gum San Chinese Heritage Centre is also an important heritage asset for the region which explores the history of Ararat as the only Australian city to be founded by the Chinese.

Arts is also an emerging strength in Ararat, with the Ararat Arts Precinct poised to become a key asset for the region. Located at the historic Ararat Town Hall, the precinct was recently redeveloped and houses the Ararat Performing Art Centre and the Ararat Regional Arts Gallery. The Performing Arts Centre regularly holds a variety of performances and shows while the Ararat Regional Art Gallery offers an extensive textile and fibre art collection which is recognised as one of the most comprehensive in Australia. The Gallery also holds a range of touring exhibitions.

Horsham has a diverse arts scene, with the city emerging as a regional cultural centre. A key asset is the Horsham Town Hall, which regularly holds cultural and community events, housing a 500-seat theatre and the Horsham Regional Art Gallery. Public art is also a key feature of the Horsham CBD, included in the Public Art and Heritage Trail. Nearby Natimuk also has a strong arts community, including local aerial performance artists, and the Goat Gallery which houses a range of local and

regional art. The Natimuk Heritage Trail heroes the historic streetscape of the township, including key buildings such as the Court House Museum, and the Colonial Bank.

A number of arts, culture and heritage assets are also centred around Hamilton in Southern Grampians Shire, including the Sir Reginald Ansett Transport Museum, the Ros McArthur Art Studio, Hamilton History Centre, Hamilton Pastoral Museum and the Hamilton Arts Gallery, which offers a range of exhibitions and other events. The Volcanoes Discovery Centre in Penhurst is also a unique regional asset.

The Southern Grampians region also hosts the biennial niche Woolly West Fest event, a community art project based around a different children's book which connects to the extensive wool producing history of the region.

The history and heritage of the Northern Grampians also provides many tourism assets for the area, including the Brambuk Cultural Centre, St Arnaud Bible Museum and Butterfly Garden, and the Stawell Cultural Heritage Trail, which is a self-guided walk/drive of major heritage sites throughout the town including the Town Hall, Pleasant Creek Courthouse Museum and railway station.

INDIGENOUS

There are extensive Indigenous assets across the region, which to date have not been fully utilised.

The Grampians or 'Gariwerd' is recognised as a very spiritual place for Aboriginal people², with Gariwerd Traditional Owners including those from the Barengi Gadjin (BGLC), Gunditj Mirring (GMTOAC), and Eastern Maar (EMAC) Registered Aboriginal Parties³

The National Park is identified as the richest site for Aboriginal rock art in Victoria with approximately 200 rock art sites recorded and five sites open to the public. The wider Grampians comprises the largest number of rock art sites in Southern Australia and over 80% of Victoria's rock art sites, some dating back more than 20,000 years.⁴

² Budja Budja Aboriginal Co-operative, <https://budjabudjacoop.org.au/about/gariwerdgrampians/>, 2018

³ <https://parkweb.vic.gov.au/about-us/news/parks-victoria-seeking-gariwerd-traditional-owners-to-guide-visitors-on-the-grampians-peaks-trail>

⁴ <https://www.visitgrampians.com.au/what-to-do/Indigenous-culture/aboriginal-rock-art-sites>

One particular site, Bunjil's Shelter, located in the Black Range Scenic Reserve, is identified as one of the most significant cultural sites in south eastern Australia and contains rock art depicting Bunjil, the Aboriginal creator and ancestral being, and two dingo helpers. It is the only known rock art painting of Bunjil.⁵ Other key sites include: Gulgurn Manja Shelter (Flat Rock), Ngamadjidj (Cave of Ghosts), Billimina (Glenisla Shelter), and Manja (Cave of Hands).

The Brambuk Cultural Centre located in the Brambuk National Park in Halls Gap, or Budja Budja, is a significant asset of the Northern Grampians and offers a range of Indigenous experiences including the Gariwerd Dreaming Theatre, Bushfoods Discovery Walk, Badeema Djilga creations, Didgeridoo workshop and Boomerang throwing.

The Langi Morgala Museum, which in the local aboriginal language means 'Home of Yesterday', originated to house the diverse collections of Aboriginal works of art and artefacts that are important to the region's history, and also houses a range of other artefacts and contemporary items.

3.1.2. NATURE BASED & WATERWAYS

Nature based and waterways is the major strength of the Grampians region, with the region being home to state significant natural assets including the Grampians National Park, and Mount Arapiles-Tooan State Park.

Ararat Rural City is home to a diverse range of national parks and associated mountainous features, including Ararat Hills Regional Park, Langi Ghiran State Park, Mount Buangor State Park and Mount Cole State Forest. It is also home to Lake Bolac.

Natural assets within Southern Grampians include Black Ranges, Mount Abrupt (Mud-Dadjug), and Mount Sturgeon, as well as those directly associated with its historic volcanic activity including Mt Napier, Victoria's youngest volcano, and Mount

Rouse, an extinct volcano. This history is also explored in the Peshurst Volcanic Discovery Centre and the Kanawinka Geotrail.

Other assets within Southern Grampians include Byaduk caves in the Mt Napier State Park, Piccaninny Walk and Hamilton Bandicoot Wildlife Walk, and other water-based assets such as Wannan Falls, Nigretta Falls, Rocklands Reservoir and Lake Hamilton.

Additional assets within Northern Grampians Shire include the St Arnaud Range National Park and Stawell Ironbacks Forest in Deep Lead Nature Conservation Reserve.

Other man-made nature assets across the Grampians include the Dunkeld Arboretum, Hamilton Botanic Gardens, Horsham Botanic Gardens, and Peshurst Wetlands Gardens and Halls Gap Zoo.

THE GRAMPIANS NATIONAL PARK

The Grampians National Park is a major Victorian tourism destination, rich in indigenous cultural assets as well as a diversity of nature based assets which support a range of recreational uses.

Significant key assets within the park include the developing Grampians Peaks Trail, Brambuk the National Park & Cultural Centre, Mount Zero; Mount William; Mount Sturgeon; Boroka Lookout; Lakes Bellfield and Wartook; Zumsteins picnic area; and waterfalls including Mackenzie, Silverband, and Beehive Falls;

Other popular assets and activities in the park include a range of walking trails, scenic and nature drives, lookouts, waterfalls, camping, and rock-climbing (including over 8000 rock climbing routes).

The Grampians is also said *'to support over 975 native plant species, including more than 75 orchid species, representing one third of the total Victorian flora. Many of these species are only found in the Grampians.'*⁶

⁵ Heritage Insight, 2013

⁶ <http://www.environment.gov.au/heritage/places/national/grampians>

MOUNT ARAPILES-TOOAN STATE PARK

The Mount Arapiles-Tooan State Park is also a major asset of the Grampians region, and is home to Mount Arapiles, a world-renowned rock-climbing location that rises 230 metres and is home to over 3000 climbing routes. The vehicle track that circles Arapiles provides opportunities to walk/drive/cycle the mountain, with the park also offering lookouts and picnic areas, as well as being home to a variety of native flora and fauna, with camping allowed in Centenary Park.



Source: Visit Grampians, 2019

WIMMERA RIVER ENVIRONS

Known to Traditional Owners as Barringgi Gadyin, the Wimmera River is central to their cultural landscape with the river and surrounding environs a significant asset for the Grampians. However it is currently underutilised and provides a key link between the Grampians and Wimmera Mallee, passing through both Dimboola and Horsham townships.

WIMMERA WETLAND SYSTEM

There are a diverse range of wetland assets across the Grampians, including 245 wetlands in the Upper Wimmera River Catchment covering an area of just over 7,000 hectares and incorporating the region's major water storages, including Lake Bellfield, Lake Wartook and Taylor's Lake.

The Natimuk-Douglas Saline Wetland System (NDSWS), locally known as the Natimuk-Douglas "Chain of Lakes," is another key wetland system in the region, running predominantly through Horsham Rural City and partially within West Wimmera. This system comprises a well-defined "chain" of more than 110 saline and brackish lakes ranging in size from one hectare to over 800 hectares, with 11 of these wetlands listed on the Directory of Important Wetlands

Many of these wetlands have very high social value by providing a source of recreational water for popular activities for the regional community like fishing, skiing, swimming, camping, sailing and yabbying attracting tourists to the region when full of water. They also support extensive flora and fauna ecosystems, including endangered birds and other animals which draw niche visitors to the region for activities such as birdwatching. Key lakes and reservoirs within the wetland system which are popular for camping, waters sports and fishing in particular include Lake Toolondo, Rocklands Reservoir, and Lake Fyans.

3.1.3. OUTDOOR ADVENTURE, SPORT AND RECREATION

The extensive nature based assets across the Grampians support a range of sport and recreational activities, including adventure based pursuits such as rock climbing at Mount Arapiles and Grampians as well as activities such as 4WD, bushwalking, and water-based activities.

The development of the iconic Grampians Peaks Trail will create a significant visitor drawcard for the region and a National Rock Climbing Museum is also currently being developed in Natimuk.

The region has a strong emerging cycling scene, offering a landscape rich in scenery and challenging geography to explore mountain biking and road cycling, with the Arapiles Big Sky Bicycle Trail a key current asset.

There are a range of community sport and recreation facilities across the region including the Horsham Motorcycle Track, which hosted the 2018 World Junior Motocross Championship. Golfing is also an important product for the region, especially for Horsham and Ararat.

Other adventure sport assets include Grampians Soaring Club which operates out of Ararat airfield.

3.1.4. TOURING

The Grampians forms part of the Great Southern Touring Route which incorporates Geelong, Great Ocean Road, Grampians and Ballarat tourism regions and currently passes through a number of key townships of the region including Ararat, Stawell, Halls Gap, and Dunkeld as well as the Grampians National Park.

Local tour operator Grampians Helicopters which operates out of Stawell Airport also offers a range of scenic flight and package tours experiences across the Grampians and Pyrenees.

The Grampians is also a popular touring attraction, with Licensed Tour Operators from Melbourne and Adelaide operating within the National Park.

3.1.5. FOOD, WINE AND AGRITOURISM

The Grampians forms part of two wine regions, the Grampians and Pyrenees wine region, as well as the Henty Wine Region (Southern Grampians Shire) with wineries across the region including Montara Wines, Mount Langi Ghiran Vineyard, Fratin Brothers Vineyard, Kimbarra Wines, Bests Wines, Seppelts, Norton Estate, Barangaroo Winery, Jillian Wines, Cathcart Ridge Estate, Clayfield Wines, Mountainside Wines, Grampians Estate, Pierrepoint Wines Cellar Door, Bochara Wines, Herrmann, and Hochkirch & Tarrington Vineyards.

Although the region is part of these two wine regions accompanying food product is relatively undeveloped across the region, when compared to other regions who are effectively capturing the Lifestyle Leader market.

Royal Mail in Dunkeld is the only hatted destination dining offer within the region, with other popular restaurant/cafes including newcomer the Bunyip-Cavendish Hotel, Baa 3400 and Capital Bistro in Horsham, The Blue Duck Hotel in Ararat, and Kookaburra Hotel in Halls Gap.

Key agritourism produce experiences include Red Rock Olives, Grampians Olives, and The Fourteen Sheep (near Glenthompson). The Bushfood Café in Brambuk Cultural Centre also provides a unique opportunity to sample local Indigenous foods.

The region includes one of Victoria's most visited National Parks – The Grampians, and the signature product strength of the region is nature based tourism; however the region is also well regarded for wine, Indigenous tourism, road cycling, arts, culture and heritage.

Whilst the nature based assets of the Grampians include some of the most scenic National and State Parks in Victoria, there remains opportunity for further investment including infrastructure to improve the visitor experience of nature based assets, and additional private sector investment in quality and contemporary accommodation, food, beverage and tour operators.

3.1.6. FESTIVALS AND EVENTS

The Grampians is home to a number of festivals and events, including a number of signature events associated with food and wine, nature, and sports. Table 10 provides an overview of events identified in the region. Each LGA also hosts a number of smaller events which primarily service the local community.

TABLE 11 IDENTIFIED EVENTS BY LGA

Event	TYPE	LOCATION	MONTH
ARARAT			
Run With The Wind	Sport & Recreation	Ararat	November
Jailhouse Rock Festival	Music	Ararat	March
Lake Bolac Eel Festival	Culture & Heritage	Lake Bolac	March (Biennial)
Golden Gateway Festival.	Family & Lifestyle	Ararat	October
HORSHAM			
Nati Frinj Biennale	Music, Art & Culture	Natimuk	November
Horsham 140 th Agricultural Show	Family & Lifestyle	Horsham	September October
Horsham Racing Cup	Sport & Recreation	Horsham	October
November 2018 Victorian Dragon Boat Regatta	Family & Lifestyle	Horsham	November
Wimmera Machinery Field Days	Agricultural	Longerenong	March
Horsham Country Music Festival	Music	Horsham	March
Art is...Festival	Art	Horsham	June
2018 World Junior Motocross Championship (one off)	Sport & Recreation	Horsham	August
Kannamaroo Festival	Family & Lifestyle	Horsham	November
NORTHERN GRAMPIANS			
Babylon Festival	Music, Art & Culture	Carapooee West (near St Arnaud)	February

Stawell Gift	Sport & Recreation	Stawell	Easter
Grampians Grape Escape Weekend Festival	Food & Wine	Halls Gap	May
Run the Gap	Sport & Recreation	Halls Gap	May
St Arnaud Country Music Festival	Music	St Arnaud	November
Grampians Music Festival	Music	Halls Gap	February
Grampians Wildflower Walkabout Festival	Nature based	Halls Gap	September
Stawell Agricultural Society Show	Family & Lifestyle	Stawell	October
Wonderland Run	Sport & Recreation	Halls Gap	August
SOUTHERN GRAMPIANS			
Cavendish Redgum Festival	Family & Lifestyle	Cavendish	April (Biennial)
Serra Terror X	Sport & Recreation	Dunkeld	June
Peaks and Trails Challenge	Sport & Recreation	Dunkeld	August
Dunkeld Races	Sport & Recreation	Dunkeld	November
Australian Pedal Car Grand Prix	Grampians Ride to Remember	Sport & Recreation	October
MULTIPLE LGAS			
Grampians Ride to Remember	Sport & Recreation	Multiple	February
Grampians Grape Escape (Partner events)	Food & Wine	Multiple	April - May
'Seriously Shiraz' Wine Festival	Food & Wine	Multiple	September

3.1.7. ACCOMMODATION

Table 12 overleaf provides a list of existing accommodation providers identified in the key townships of each LGA within the Grampians.

TABLE 12 IDENTIFIED ACCOMMODATION IN KEY TOWNSHIPS BY LGA

ARARAT	HORSHAM	NORTHERN GRAMPPIANS		SOUTHERN GRAMPPIANS
<p>Ararat</p> <ul style="list-style-type: none"> • Ararat Motor Inn • Southern Cross Motor Inn • The Blue House at Mountainside Wines, Warrak • Chalambar Motel • Pyrenees Caravan Park • Ararat Colonial Lodge Motel • Statesman Motor Inn • City Centre Accommodation • Bricks and Roses • Acacia Caravan Park • Shire Hall Hotel • Ararat Central Hotel • Ararat Hotel • Links Retreat • Golden Gate Lodge • Wanderlust Glamping (various locations) <p>There are also a small number of accommodation providers (predominantly Airbnb) within Pomonal and Moyston.</p>	<p>Horsham</p> <ul style="list-style-type: none"> • Horsham Riverside Caravan Park • Smerdon Lodge Motel • Ploughmans Motor Inn • Horsham Motel • Golden Grain Motor Inn • Comfort Inn May Park • May Park Executive Apartments • Horsham Mid City Court Motel • Capitol Motel • Horsham International • Wimmera Lakes Caravan Resort <p>Natimuk</p> <ul style="list-style-type: none"> • Natimuk Lake Caravan Park • Natimuk National Hotel 	<p>Halls Gap</p> <ul style="list-style-type: none"> • Halls Gap Lakeside Tourist Park • Tim's Place • Boroka Downs • Halls Gap Lakeside Tourist Park • Halls Gap Valley Lodges • Gang Gang Villas • Grampians Motel • Halls Gap Log Cabins • Boronia Peak Villas • Awonga Holiday Cottages • D'Altons Resort • Heavenly Retreat • Halls Gap Motel • Comfort Inn Country Plaza Halls Gap • Kookaburra Motor Lodge • Halls Gap Caravan Park • Gariwerd Motel • Grampians Eco YHA • Heatherlie Cottages Halls Gap • Marwood Luxury Villas • Halls Gap Gardens Caravan Park • Grampians View Cottages and Units • Mountain View Motor Inn & Holiday Lodges 	<ul style="list-style-type: none"> • Grampians Getaway • Grampians Pioneer Cottages • Pippin Lodge <p>Stawell</p> <ul style="list-style-type: none"> • Stawell Holiday Cottages • Magdala Motor Lodge • Coorrabin Motor Inn • Motel Stawell • Grampians Gate Caravan Park • Hi-Way Eight Motor Inn • Stawell Park Caravan Park • The Brix Hotel • Diamond House Heritage Restaurant & Motor Inn • National Hotel <p>St Arnaud</p> <ul style="list-style-type: none"> • St Arnaud Old Post Office Apartments • The Old Convent St Arnaud • Motel St Arnaud • Country Road Motel • St Arnaud Caravan Park • La Cochon Rose Motel • Royal Hotel St Arnaud <p>Great Western</p> <ul style="list-style-type: none"> • Great Western Hotel 	<p>Dunkeld</p> <ul style="list-style-type: none"> • Grampians View B&B • Southern Grampians Cottages • Royal Mail Hotel Dunkeld • Corrugated Cottage • Mereweather Estate • Dunkeld Caravan Park • Cloud Mountain Retreat <p>Hamilton</p> <ul style="list-style-type: none"> • Hamilton Caravan Park • Boomers Guest House • Hamilton Premium Apartment • Hamilton Townhouse Motel • Aat 28 Goldsmith Motel Hamilton • Hamilton Lonsdale Motel • Budget on the Lake • Comfort Inn Botanical • Caledonian Hotel Motel • Best Western Hamilton Lakeside Motel • Lake Hamilton Motor Village & Caravan Park • Hamilton Standard Apartment • Comfort Inn Grange Burn • Bandicoot Motor inn • B&B in Tarrington.

AIRBNB

Overall within the Grampians there were 293 rentals, comprised of 247 entire homes (84%) and 46 private rooms (14%) in the Grampians Region. 204 active hosts were recorded by AirDNA across the Grampians region, with 84 in Northern Grampians. Table 12 provides a breakdown of available properties by LGA. Key findings for each LGA were:

Ararat

AirDNA recorded 36 rentals within Ararat Shire, including 27 entire homes and 6 private rooms. Across the rentals:

- The occupancy rate was 68%;
- 61% of rentals are available year round; and
- The average daily rate was \$165.

Horsham

In the rural city of Horsham 50 rentals were recorded on AirDNA with 36 entire homes and 14 private rooms. Across the rentals:

- The occupancy rate in the rural city was 55%;
- 64% of the rentals were available year round; and
- The average daily rate was \$127.

Northern Grampians

135 rentals were recorded on AirDNA with 94% entire homes (127) and 6% (8) private rooms. Across the rentals:

- The occupancy rate was 44%;
- 72% were available year round; and
- The average daily rate was \$175.

Southern Grampians

AirDNA recorded 75 rentals in Southern Grampians with 57 (76%) entire homes and 18 (24%) private rooms. Across the rentals:

- The occupancy rate was 36%;
- 63% were available year round; and
- The average daily rate was \$136.

TABLE 13 AIRBNB PROPERTY CHARACTERISTICS BY LGA

	ENTIRE HOMES	PRIVATE ROOMS	AVERAGE DAILY RATE	OCCUPANCY RATE	% AVAILABLE FULL TIME	# OF HOSTS
Ararat	27	6	\$165	68%	61%	27
Horsham	36	14	\$127	55%	64%	37
Northern Grampians	127	8	\$175	44%	72%	84
Southern Grampians	57	18	\$136	36%	63%	56

Source: AIRDNA, 2018

3.2. VISITOR PROFILE

The following section provides a summary of visitation to the Grampians, and the LGAs that comprise it, including providing a comparative overview of key visitor demographics by LGA.

NOTES ON ANALYSIS

- This assessment draws on data collected by Tourism Research Australia’s National Visitor Survey (NVS) and International Visitor Survey (IVS) to analyse trend and demographic data for both domestic and international visitors to the region.
- All LGA visitor and demographic data has been based on the 10-year average from 2008 to 2017 (YE December) due to low sample sizes across some LGAs.
- Percentage figures have been rounded to the nearest whole number and therefore may not equal 100%.

3.2.1. VISITATION OVERVIEW

In 2017, the Grampians received just under 1.6 million visitors per annum. Over half (57%) of these visitors were domestic daytrip visitors (903,289), followed by 42% domestic overnight visitors and 2% international visitors.

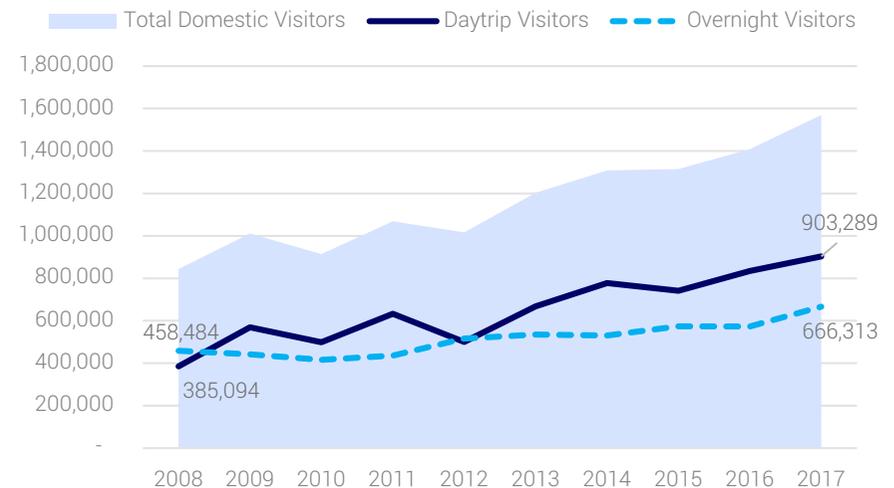
SUMMARY OF VISITATION TO GRAMPAINS (2017)

903,289	666,313	28,565
DOMESTIC DAYTRIP VISITORS	DOMESTIC OVERNIGHT VISITORS	INTERNATIONAL VISITORS

DOMESTIC VISITORS

Domestic visitation to the Grampians has experienced strong growth over the decade to 2017, particularly across the domestic daytrip market, gaining an extra 518,195 visitors per annum between 2008 and 2017 (Figure 11).

FIGURE 11 DOMESTIC VISITATION TREND 2008-2017



Source: TRA NVS Visitation 2008-2017 YE Dec

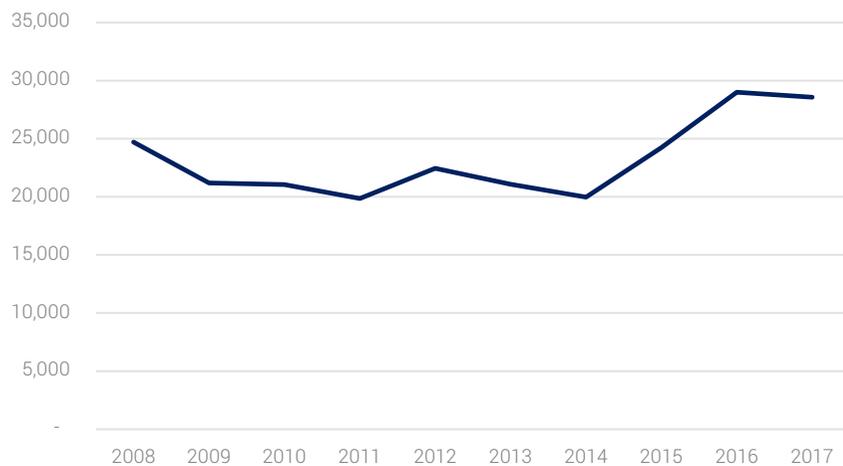
The Grampians currently attracts significantly higher visitation than the Wimmera Mallee and has experienced significant growth over the last decade particularly across the domestic daytrip visitor market.

Horsham attracts the largest number of total visitors in the region, however Northern Grampians is the tourism visitor hub of the region, attracting a higher share of both overnight and international visitors

INTERNATIONAL VISITORS

Whilst comprising only a small proportion of visitors to the Grampians, the number of international visitors to the region has experienced growth across the decade, particularly between 2014 and 2016 where it grew by 45%, before dipping slightly to 2017 (Figure 12).

FIGURE 12 INTERNATIONAL VISITATION TREND 2008-2017



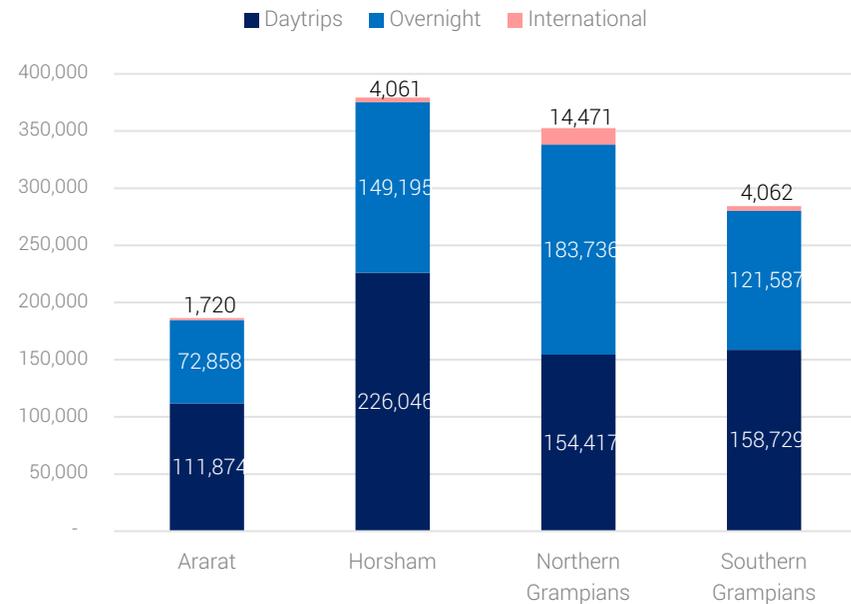
Source: TRA IVS Visitation 2008-2017 YE Dec

3.2.2. LGA VISITATION OVERVIEW

Figure 13 provides an overview of the average total annual visitation to each LGA within the Grampians, between 2008 and 2017. It shows that Horsham experienced the highest overall number of annual visitors (379,302), supported by a strong daytrip market (226,046 annual visitors) which would include a significant share of non-holiday visitors; whilst Northern Grampians attracted the highest number of both domestic overnight (183,195) and international visitors (14,471), attracting 60% of

all international visitation to the region. Ararat attracted the lowest share of visitors across all markets.

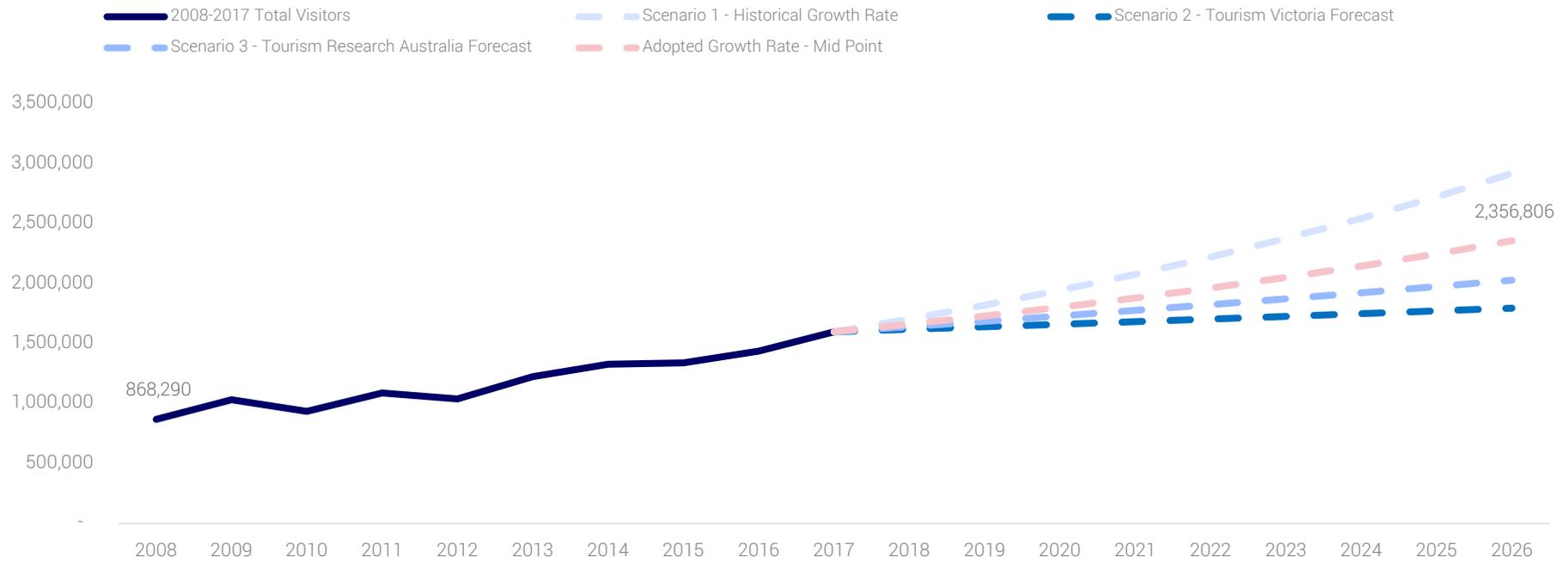
FIGURE 13 LGA VISITATION - 10 YEAR AVERAGE



3.2.3. VISITOR PROJECTIONS

Figure 14 overleaf provides a projected growth scenario for the Grampians, based on a number of visitation scenarios including historical growth and tourism forecast growth rates. It estimates that the region will attract approximately 2,356,806 annually by 2026.

FIGURE 14 GRAMPIANS VISITOR PROJECTION



Source: TRA NVS & IVS Visitation; TRA Visitor Forecasts; Tourism Victoria TEVE Research Unit, Forecast visitation to Victoria, August 2017; modelled by Urban Enterprise 2018

3.2.4. VISITOR DEMOGRAPHICS

Table 13 overleaf provides a summary of key domestic visitor demographic indicators by LGA. Key findings by market are outlined below.

DAYTRIP

- Daytrip visitors to the LGAs within the Grampians had an older visitor profile, however the Northern Grampians has a higher proportion of visitors aged under 25 (14%);
- Both Horsham and Northern Grampians have a higher proportion of visitors aged 15-34 (26% and 29% respectively);
- All LGA's attract the majority of their daytrip visitors from intrastate, however Southern Grampians also attracts a significant share from South Australia (14%);
- The majority of daytrip visitors to Northern Grampians are holiday visitors (58%), which is a significantly higher proportion than the other three LGAs;
- A high proportion of daytrip visitors to Ararat are VFR visitors (35%);
- Horsham attracts the highest proportion of 'other' visitors which includes reasons such as employment, education, and medical, indicative of its role as an administrative hub for the region; Southern Grampians also attracts a significant proportion of its visitors for 'other reason' (21%) which could be linked to its link to the education sector (RMIT Hamilton Campus);
- A lower proportion of visitors to the Southern Grampians participate in eating/dining out;
- A significantly higher proportion of visitors to Horsham go shopping for pleasure (38%);
- 22% of visitors to Southern Grampians indicated they participated in none of the listed activities, significantly higher than the other three LGAs; and

- Visitors to the Northern Grampians were much more likely to participate in activities during their daytrip, with comparatively higher proportions participating in sightseeing/looking around (28%); visiting national parks/state parks (26%); bushwalking (22%); visiting museums/heritage buildings, sites or monuments (67); and visiting wildlife parks/ zoos (7%)

OVERNIGHT

- Overnight visitors had a more even age spread than daytrip visitor; however the largest single age group for all LGAs was still those aged over 55;
- Overnight visitors for all four LGAs were predominantly intrastate, however Horsham did attract a significant proportion of South Australian visitors (18%) followed by Northern Grampians (14%) and Southern Grampians (12%) albeit to a lesser extent;
- With the exception of Northern Grampians, LGAs in the Grampians attracted a relatively low proportion of holiday visitors;
- Ararat and Horsham attracted significant proportions of their visitors for business purposes (22% and 19% respectively);
- 6% of overnight visitors to Horsham were only in transit;
- Less than half of overnight visitors to each LGA ate or dined out as an activity during their trip;
- Overnight visitors to Northern Grampians again showed higher activity participation rates, in particular the proportion sightseeing/looking around (35%); Bushwalking (47%); visiting national parks / state parks (36%) which directly correlates to the regions key strengths and reputation as a nature based recreation destination; and
- Although low compared to participation in other activities, 5% of visitors to Northern Grampians experienced aboriginal art / craft and cultural displays as part of their visit, compared to 0% for all three other LGAs.

TABLE 14 LGA DOMESTIC DAYTRIP AND OVERNIGHT VISITOR DEMOGRAPHIC KEY INDICATORS

	Daytrip Visitors					Overnight Visitors				
	Indicator	ARARAT	HORSHAM	NORTHERN GRAMPIANS	SOUTHERN GRAMPIANS	Indicator	ARARAT	HORSHAM	NORTHERN GRAMPIANS	SOUTHERN GRAMPIANS
Age Structure	15-24 years	9%	8%	14%	8%	15-24 years	15%	12%	11%	14%
	25-34 years	8%	18%	15%	8%	25-34 years	13%	17%	20%	17%
	35-44 years	19%	13%	12%	17%	35-44 years	20%	18%	16%	14%
	45-54 years	18%	17%	23%	20%	45-54 years	16%	17%	15%	15%
	55+ years	46%	44%	36%	47%	55+ years	36%	36%	38%	40%
Origin State/ Country (Top)	Victoria	98%	96%	98%	86%	Victoria	84%	72%	77%	76%
	South Australia	2%	4%	1%	14%	South Australia	9%	18%	14%	12%
	New South Wales	0%	0%	1%	0%	New South Wales	5%	5%	4%	7%
						Queensland	0%	3%	3%	3%
						Other	1%	3%	2%	2%
Purpose of Visit (Top)	Holiday	37%	43%	58%	36%	Holiday	38%	35%	64%	38%
	Visiting friends and relatives	35%	20%	18%	29%	Visiting friends and relatives	33%	34%	21%	39%
	Other reason	14%	23%	12%	21%	Business	22%	19%	10%	16%
	Business	15%	14%	13%	14%	Other reason	3%	5%	2%	6%
						In transit	2%	6%	1%	1%
						Not stated/not asked	1%	0%	1%	1%
Activities (Top)	Eat out / dine at a restaurant and/or cafe	46%	43%	48%	34%	Eat out / dine at a restaurant and/or cafe	42%	46%	49%	48%
	Visit friends & relatives	34%	27%	22%	33%	Visit friends & relatives	38%	38%	26%	46%
	Go shopping for pleasure	11%	38%	10%	18%	Sightseeing/looking around	23%	18%	35%	27%
	None of these	15%	16%	10%	22%	Bushwalking / rainforest walks	17%	10%	47%	17%
	Sightseeing/looking around	13%	7%	28%	13%	Visit national parks / state parks	13%	10%	36%	16%
	Visit national parks / state parks	8%	2%	26%	4%	Pubs, clubs, discos etc	19%	19%	18%	12%
	Bushwalking / rainforest walks	6%	2%	22%	4%	Go shopping for pleasure	10%	13%	13%	13%
	Pubs, clubs, discos etc	8%	7%	10%	5%	None of these	10%	14%	7%	11%

Daytrip Visitors					Overnight Visitors				
Indicator	ARARAT	HORSHAM	NORTHERN GRAMPIANS	SOUTHERN GRAMPIANS	Indicator	ARARAT	HORSHAM	NORTHERN GRAMPIANS	SOUTHERN GRAMPIANS
Picnics or BBQs	5%	1%	11%	3%	Picnics or BBQs	6%	5%	8%	6%
Attend an organised sporting event	6%	3%	1%	4%	Other outdoor activities nfd	4%	9%	6%	5%
Visit museums or art galleries	0%	2%	6%	1%	Go on a daytrip to another place	5%	3%	6%	4%
Visit history / heritage buildings, sites or monuments	3%	0%	5%	2%	Visit museums or art galleries	4%	2%	7%	4%
Visit wildlife parks / zoos / aquariums	0%	0%	7%	0%	Fishing	5%	4%	3%	5%
					Visit history / heritage buildings, sites or monuments	6%	2%	5%	3%
					Play other sports	5%	2%	4%	3%
					Exercise, gym or swimming	4%	3%	3%	5%
					Visit wineries	4%	0%	6%	2%
					Visit wildlife parks / zoos / aquariums	1%	1%	7%	1%
					Visit botanical or other public gardens	2%	3%	2%	5%
					Visit farms	2%	3%	1%	5%
					Experience aboriginal art / craft and cultural displays	0%	0%	5%	0%

Significantly higher
 Significantly lower

Source: TRA NVS & IVS 2008-2017 average (YE December)

3.3. ECONOMIC PROFILE

The following provides a breakdown of the top industry sectors and community characteristics in the Grampians, using 2016 census data and 2018 Remplan ABR data.

Overall the tourism industry accounts for an estimated 1387 jobs across the Grampians, or 5% of total industry jobs.

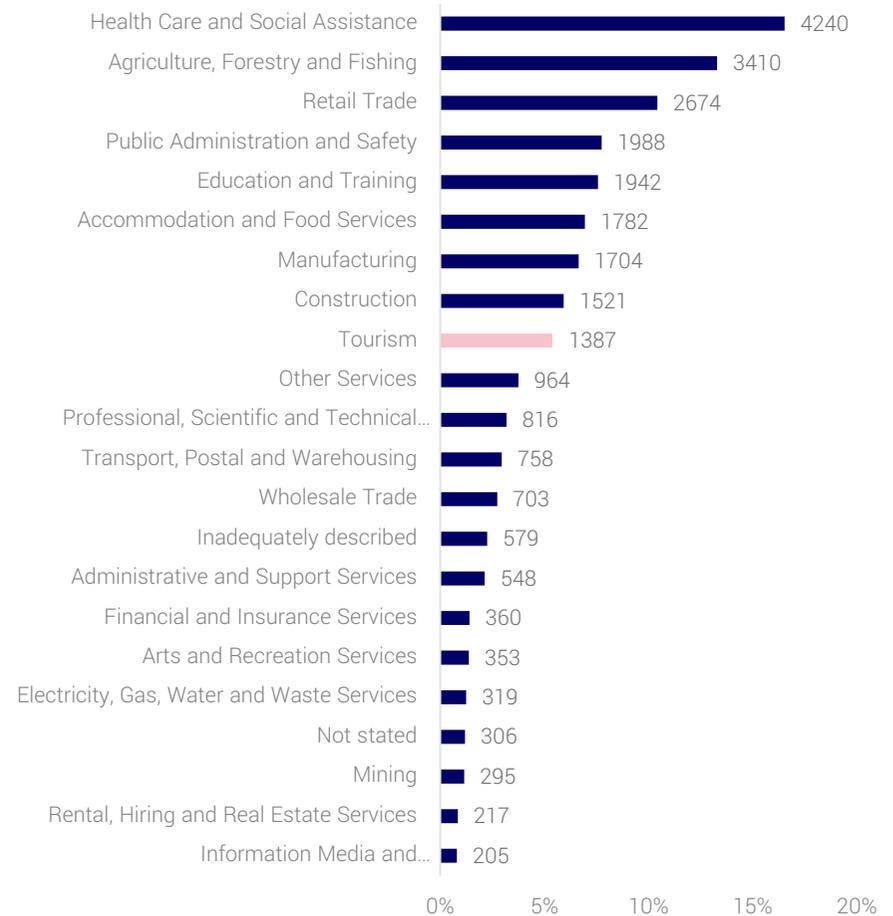
The value of tourism to Northern Grampians and Horsham is similar, with the dollar amount of tourism impact higher in Horsham; but comprising a higher proportion of the Northern Grampians economy.

The impact of the tourism industry on Ararat's economy is markedly different, equating to a much lower proportion of the total industry output, jobs and value added, with Public Administration and Safety playing a much larger role owing to the Hopkins Correctional Centre.

3.3.1. KEY INDUSTRY SECTORS

Figure 15 shows that Health Care and Social Assistance comprises the largest share of employment across the region, with 17% of jobs (4240) in this sector, followed by 13% in Agriculture, Forestry and Fishing (3410), 10% in Retail Trade (2674) and 8% each in Public Administration and Safety (1988) and Education and Training (1942). Overall the tourism industry accounts for an estimated 1387 jobs across the Grampians, or 5% of total industry jobs.

FIGURE 15 INDUSTRY JOBS AND % BY PLACE OF WORK



Source: ABS TableBuilder, Industry Sector by Place of Work, 2016 Census data; ABS Tourism Satellite Accounts 2016-17

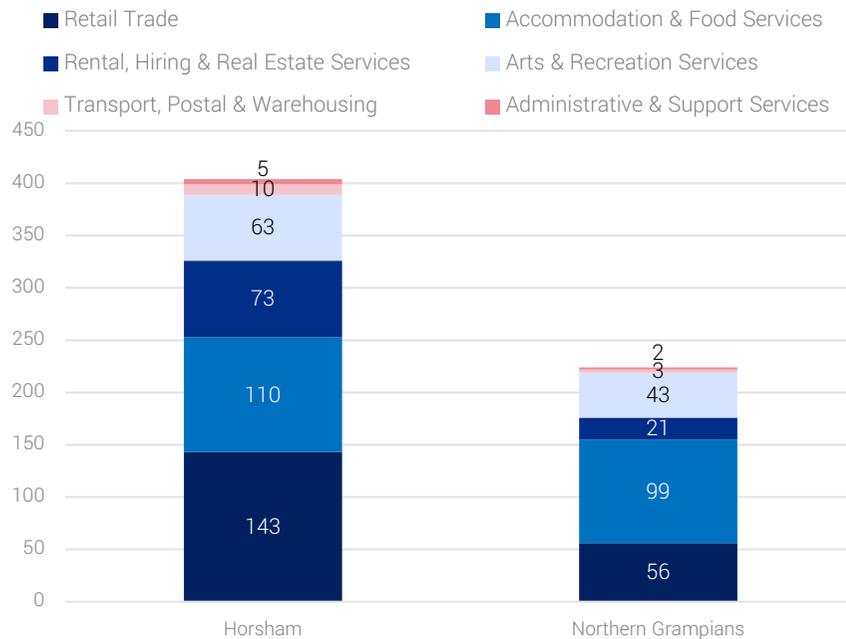
3.3.2. TOURISM BUSINESS AUDIT

Within Horsham Rural City and Northern Grampians Shire a total of approximately 628 tourism related businesses were identified. This comprised 404 tourism related businesses in Horsham, and 224 in Northern Grampians.

INDUSTRY SECTOR

Of businesses within the three Shires, the largest proportion were Retail Trade (32% or 199 businesses). Figure 16 shows the number of businesses by type for each LGA.

FIGURE 16 NUMBER OF BUSINESSES BY TYPE BY LGA

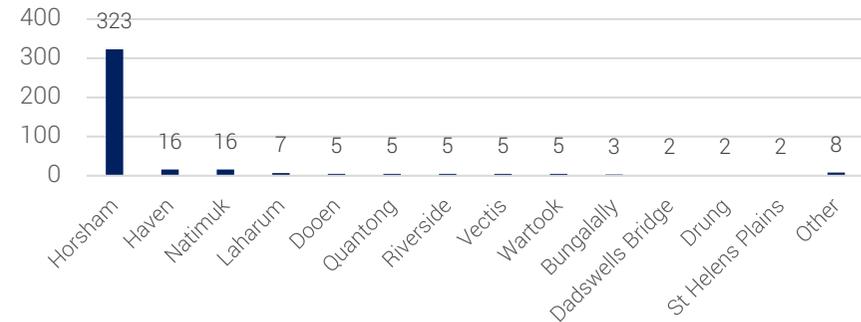


Source: Remplan ABR Data, February 2018

LOCATION

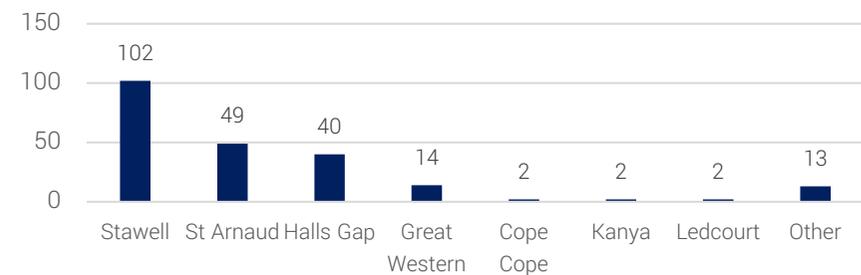
Within Horsham Rural City the overwhelming majority of businesses were located in the city of Horsham itself (80% or 323 businesses) (Figure 17).

FIGURE 17 HORSHAM TOURISM RELATED BUSINESSES BY LOCATION (#)



Within Northern Grampians Shire, the township of Stawell had the largest number of tourism related businesses (102), followed by St Arnaud (49) and Halls Gap (40) (Figure 18).

FIGURE 18 NTH GRAMPIANS TOURISM RELATED BUSINESSES BY LOCATION (#)



Source: Remplan ABR Data, February 2018

3.4. COMMUNITY PROFILE

In 2016 there were 58,625 people residing in the Grampians region, down by 41 people from the recorded 2011 population (Table 14). Horsham was home to the greatest proportion of residents, with approximately 34% (19,642 people) of the total population of the Grampians region living in this Rural City. 27% of the Grampians population reside in the Southern Grampians and approximately 19% lived in each of Ararat and Northern Grampians local government areas. The median age of residents ranged from 42 in Horsham to 48 in the Northern Grampians as compared to 37 for Victoria as a whole.

The median weekly household income in the Grampians varied across each Local Government Area, ranging from \$931 dollars in the Northern Grampians to \$1110 in the rural city of Horsham, and were all lower than the Victorian average of \$1419. Overall, 26,586 private dwellings were recorded in the Grampians region, including 9,192 in Horsham (35%), 7,963 in Southern Grampians (30%), 6,065 in Northern Grampians (23%) and 5,382 in Ararat (20%).

TABLE 15 KEY STATISTICS BY LGA

LGA	POPULATION		MEDIAN AGE (2016)	MEDIAN WEEKLY HOUSEHOLD INCOME (2016)	PRIVATE DWELLINGS (2016)
	2011	2016			
Ararat	11,183	11,600	46	\$991	5,382
Horsham	19,279	19,642	42	\$1,110	9,192
Northern Grampians	11,845	11,439	48	\$931	6,065
Southern Grampians	16,359	15,944	46	\$1,043	7,963

Source: ABS Census 2011 & 2016.

Northern Grampians and Southern Grampians Shire's have both experienced population decline between 2011 and 2016 census'. Northern Grampians has

the highest median age (48) and lowest median weekly income (\$931) across the sub-region.

TOWNSHIPS

The historical population trend for key townships in the region (Table 15) shows that by number Hamilton (-458) and Stawell (-216) had the largest declines, with Penhurst (-1.5%) and St Arnaud (-1.4%) having the lowest AAG rates over the period. Horsham gained the largest number of new residents, with an extra 365 new people across the 5 year period. Dunkeld had the highest growth by AAGR, gaining an extra 47 residents or an average of 2% growth annually over the period.

TABLE 16 POPULATION OF KEY TOWNS

TOWNSHIP	LGA	POPULATION		CHANGE 2011 TO 2016	AAGR %
		2011	2016		
Ararat	Ararat	7024	6925	-99	-0.3%
Penhurst	Southern Grampians	471	437	-34	-1.5%
Dunkeld	Southern Grampians	461	508	47	2.0%
Hamilton	Southern Grampians	9346	8888	-458	-1.0%
Coleraine	Southern Grampians	908	851	-57	-1.3%
Halls gap	Northern Grampians	305	316	11	0.7%
Stawell	Northern Grampians	5736	5520	-216	-0.8%
Natimuk	Horsham	409	397	-12	-0.6%
Horsham	Horsham	15262	15627	365	0.5%
St Arnaud	Northern Grampians	2184	2033	-151	-1.4%
<i>Regional Victoria</i>		<i>1,345,717</i>	<i>1,433,818</i>	<i>88,101</i>	<i>1.3%</i>
<i>Victoria</i>		<i>5,354,039</i>	<i>5,926,624</i>	<i>572,585</i>	<i>2.1%</i>

Source: ABS Census 2011 & 2016

3.5. VISITOR SERVICING

Overall, the delivery of visitor information services varies across the region, between LGAs and between physical and digital delivery modes.

Each LGA within the Grampians currently provides one accredited Visitor Information Centre or 'Hub VIC', however these vary greatly in the amount of walk in visitors they attract, and the overall cost required to operate the centre.

Halls Gap VIC clearly outperforms the other VICs across the Grampians, attracting significantly higher visitation, and operating much more efficiently under the Grampians Tourism delivery model

Consideration should be given by Ararat, Horsham and Southern Grampians to enter into an agreement with Grampians Tourism for the operation of the existing Ararat, Dunkeld, and Horsham VICs.

The newly adopted guidelines for visitor information centres, supports a regional approach to visitor information servicing where management and paid professional staff resources can be shared across a number of VIC's therefore reducing cost of information services. A state wide visitor servicing strategy is also currently underway which will inform visitor services direction across the region.

3.5.1. VISITOR INFORMATION CENTRES

A review and assessment of the current visitor information centre services was conducted across the Grampians. It identified that the four LGA's within the Grampians region provide the following VIC resources:

- Ararat – 1 accredited VIC (Ararat) and 1 unaccredited VIC (Lake Bolac Information & Business Centre);
- Horsham – 1 accredited VIC (Horsham);
- Northern Grampians – 1 accredited VIC (Halls Gap); and 2 unaccredited VICs (St Arnaud and Stawell (Cafe 1868)); and
- Southern Grampians – 2 accredited VICs (Dunkeld and Hamilton).

A summary of each accredited VIC is given below based on information provided by the relevant LGAs(s).



Source: Visit Victoria, 2019

3.5.2. CURRENT VIC NETWORK PERFORMANCE

OPERATING BUDGET

Of the annual amount provided by Northern Grampians Shire to Grampians Tourism to provide regional marketing services, \$176,530 is dedicated to operating the Halls Gap VIC (and other non-accredited VICs), plus a further \$4060 in building and maintenance operational costs paid by Northern Grampians. In 2017/18 FY, the Halls Gap VIC generated \$37k in revenue from retail sales.

Budget information was not provided for Southern Grampians or Ararat VICs.

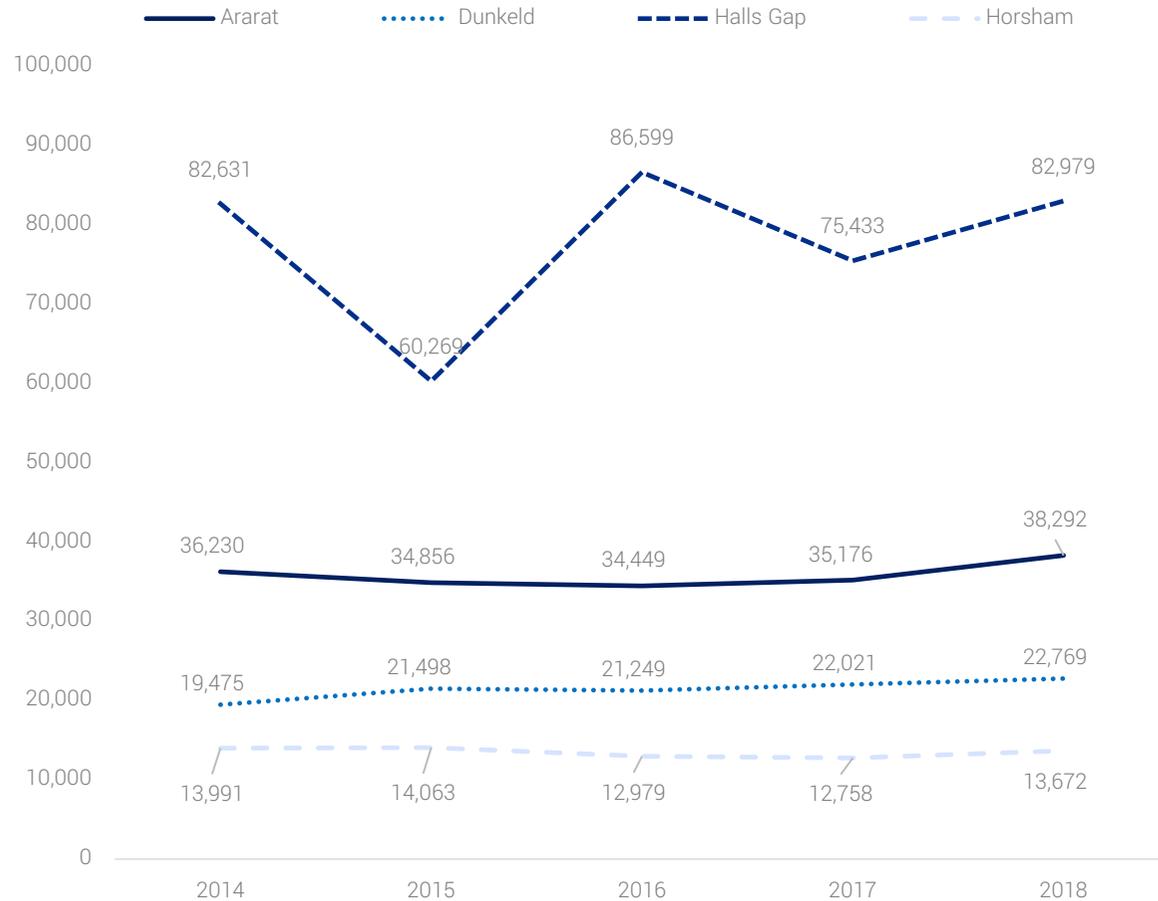
VISITATION

Walk-in visitation across the existing accredited VIC network varies significantly across the four centres, with Halls Gap attracting considerably higher visitation than the other three centres, linked to both its location and the existing visitor market for Northern Grampians (Figure 19).

Visitation to three of the four centres has remained fairly steady, whilst Halls Gap has experienced some variation over the period, some of which is likely attributed to the centre's relocation.

Visitation information was not provided for Hamilton VIC.

FIGURE 19 GRAMPIANS VIC WALK IN VISITATION TREND 2014 TO 2018



Source: Grampians Tourism 2018

Capture rate

Halls Gap is currently performing well capturing almost a quarter (24%) of total annual visitors to the LGA as walk in visitors to the centre, as is Ararat capturing 21% (Table 17). Both Dunkeld and Horsham VIC are currently underperforming, with Horsham LGA attracting the highest average annual total visitation amongst the four LGAs, yet the lowest number of VIC walk-in visitors, equating to a capture rate of only 4% of total visitation.

TABLE 17 CAPTURE RATE BY VIC 2017/18

VIC	WALK IN VISITORS TO VIC/S	NUMBER OF VISITORS (TO LGA)	VISITOR CAPTURE BY VICS (%)
Ararat	38,292	186,452	21%
Dunkeld	22,769	284,378	8%
Halls Gap	82,979	352,623	24%
Horsham	13,672	379,302	4%

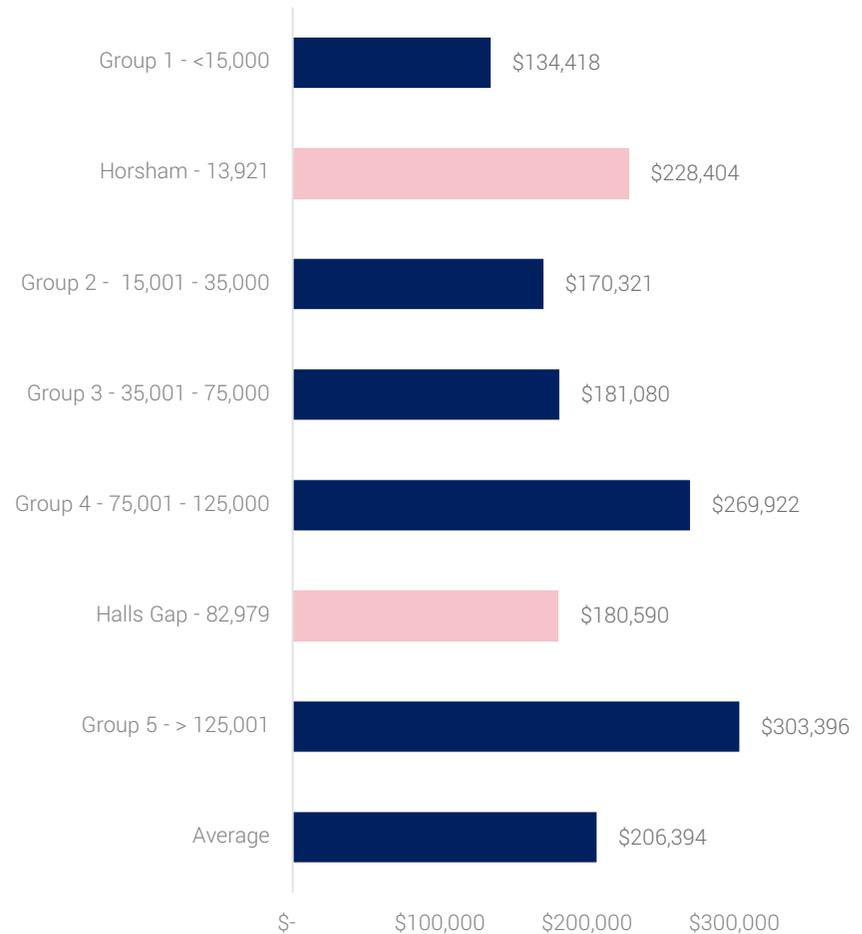
Source: Grampians Tourism, 2018; TRAN VS & IVS Visitation 2008-2017 average YE Dec.

BENCHMARKING OF RESOURCES

In the 2017/18 FY, the cost to operate the Halls Gap VIC was \$180,590, and the Horsham and Grampians VIC \$228,404.

The benchmarking data (Figure 20) shows that for Halls Gap VIC, expenditure is lower than the average for VICs operated by Local Government (\$206,394), whilst for Horsham it is higher.

FIGURE 20 HALLS GAP VIC EXPENDITURE



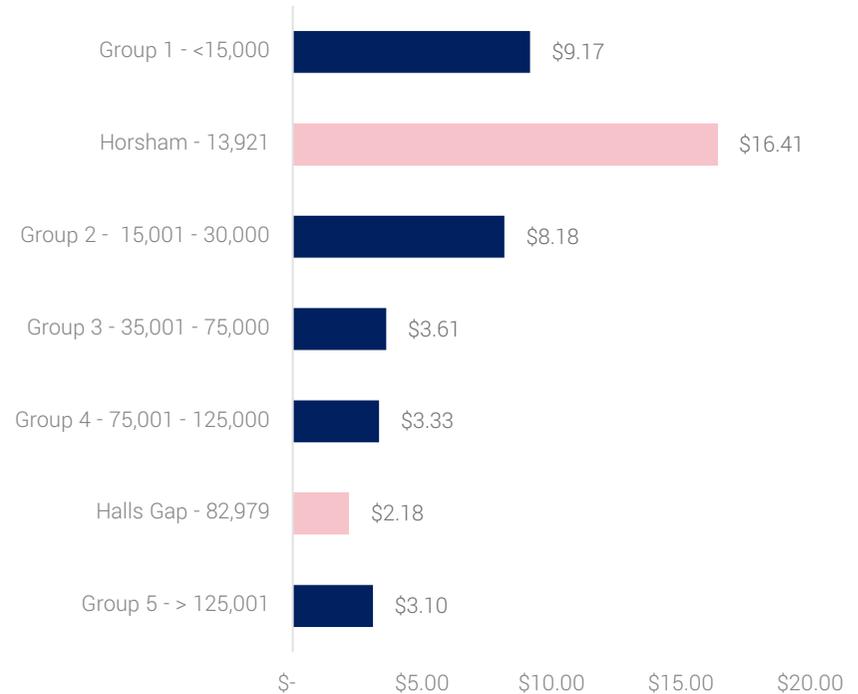
Source: Grampians Tourism, 2018; Horsham Rural City Council, 2018, VIC Futures Project, Urban Enterprise.

VIC DELIVERY COST PER VISITOR

In line with walk in visitation, Halls Gap VIC is currently performing well against the average cost of service delivery for VIC visitors, with each visitor to the centre costing approximately \$2.18 to service, as compared to \$3.33 for VICs of similar size (Figure 21).

Conversely, service delivery cost for walk in visitors to the Horsham VIC is currently well above the average, costing \$16.41 per visitor, compared to \$9.17 on average for VICs of similar size.

FIGURE 21 VIC DELIVERY COST PER WALK IN VISITOR



Source: Grampians Tourism, 2018; Horsham Rural City Council, 2018, VIC Futures Project, Urban Enterprise.

3.5.3. VISITOR INFORMATION SERVICES DEMAND

The Mornington Peninsula Visitor Journey Report prepared by Urban Enterprise in 2014 identified that approximately 62% of visitors preferred to access information on their smart phone or tablets, whilst only 14% preferred to access information at a VIC. A smaller research project conducted in 2016 for Wodonga specifically identified approximately 60% of visitors preferred to access information on their smart phone or tablets, whilst 20% preferred to access information at a VIC. Only 27% of visitors surveyed in Wodonga identified that they had used a source of information during their trip.

An average of these results has been used to calculate the potential visitor demand across the LGAs of the Grampians for physical VICs, digital information and published collateral (Table 18). This demand modelling also utilised information from TRA's IVS and NVS; Urban Enterprise's 2014 Mornington Peninsula Visitor Journey Report; Urban Enterprise's 2016 Wodonga Visitor Information Centre Service Review; and information collected from Grampians Tourism.

Table 18 shows that currently both Ararat and Halls Gap VICs are outperforming the level of visitation they should be attracting based on wider VIC trends, Halls Gap VIC significantly so, reflective of its location and Halls Gap's role as the primary holiday visitor node in the region.

Dunkeld and Horsham VICs are currently underperforming in terms of VIC walk in visitor numbers, particularly Horsham which currently attracts just over a third of the estimated demand.

TABLE 18 POTENTIAL DEMAND BASED ON PREFERRED INFORMATION SOURCE

SUBREGION	VIC	DIGITAL	PUBLISHED COLLATERAL
Ararat	20,127	72,222	14,800
Dunkeld	30,699	110,154	22,573
Halls Gap	38,066	136,589	27,989
Horsham	40,946	146,923	30,107

Based on previous accreditation guidelines, sustainable VICs were identified as those which can attract more than 35,000 visitors. This reduces the cost per visitor substantially, due to the high cost to operate VICs within the accreditation guidelines. Based on this theoretical demand analysis, at an LGA level only Halls Gap and Horsham can currently support an accredited VIC, with approximately 3.7 accredited VICs able to be supported at a sub-regional level.

3.5.4. DIGITAL MARKETING AND PRESENCE

A review of digital marketing and presence, including social media engagement was also conducted for the Grampians Sub-Region. In addition to the Visit Grampians website, Horsham (Visit Horsham) and Southern Grampians (Visit Greater Hamilton), also have stand-alone tourism websites. Visit Grampians social media channels including Facebook, Instagram, YouTube and Twitter have a strong social media presence, and active engagement, with Facebook and Instagram both attracting in excess of 20,000 followers.

Review of social media channels for the four LGAs within the Grampians, demonstrates varying levels of social media presence and engagement. Northern Grampians Shire currently operates the most sophisticatedly in this space, with current Facebook, Instagram, YouTube and Twitter accounts, albeit with varying levels of use and engagement.

3.6. MARKET RESEARCH

Market research conducted for the Grampians elicited a total of 242 responses, 155 or 64% of which indicated they had previously visited the region.

3.6.1. VISITOR PROFILE

Respondents who had visited the region had an almost even gender split (52% female, 45% male, and 3% not stated), with the largest share aged between 30-44 (38%) followed by those aged 15-29, and 60-74 (both 20%).

67% of those who had visited were born in Australia, with 79% located in Victoria and 20% from South Australia (1% not stated). The majority had no children in their household (69%).

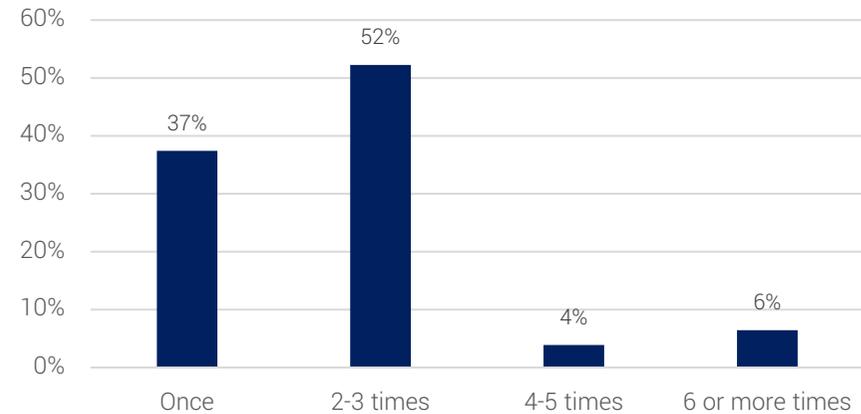
3.6.2. VISITING THE REGION

PAST VISITATION

Of those who had visited the Grampians, 41% indicated they had visited for a daytrip (41%), followed by 39% who had visited for a short break (2-3 days) and 20% who had visited for a long break (3+ days).

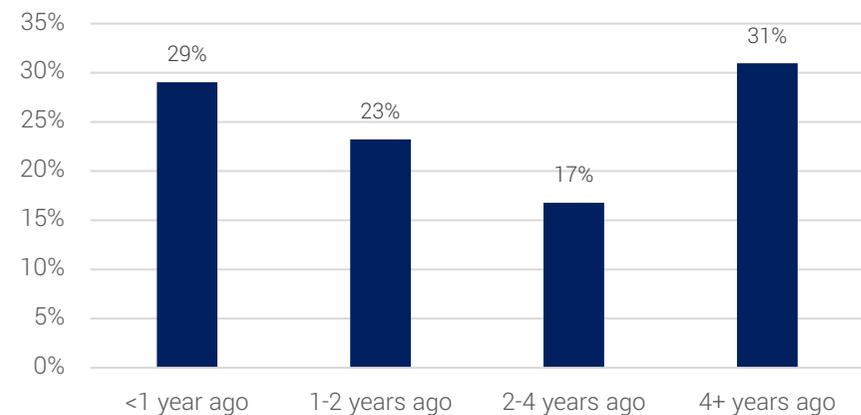
Of those who had visited, 52% had visited the region 2-3 times (52%), followed by 37% who had visited only once (Figure 22).

FIGURE 22 NUMBER OF TIMES VISITED BY %



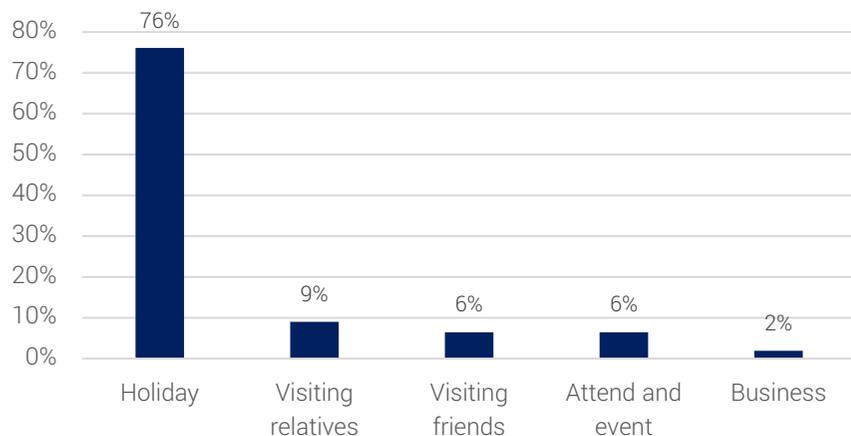
Just under one third of those who had visited the region had done so longer than 4 years ago (31%), or within the last year (29%) (Figure 23)

FIGURE 23 TIME OF LAST VISIT BY %



Visiting for a holiday was the most popular purpose of visit, with 76% indicating that this was the reason for their last visit to the region (Figure 24).

FIGURE 24 PURPOSE OF LAST VISIT



Visitors to the Grampians identified visiting a range of townships, natural assets and (to a lesser extent) attractions during their most recent visit.

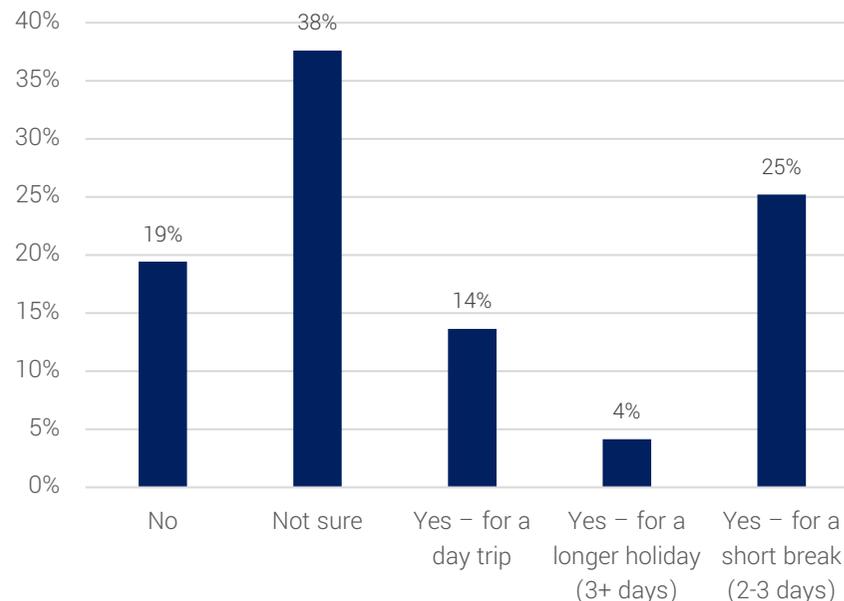
As a broad category, natural assets were the most often identified, with the Grampians National Park the most popular response. Halls Gap, Stawell, Horsham, and Ararat were the most popular townships visited.

16% of visitors indicated they were unsure or could not remember what townships/activities/attractions they had visited.

FUTURE VISITATION

Of all respondents, 43% indicated they intended to visit the Grampians over the next 12 months, while 19% did not plan to visit and a further 38% were unsure if they would visit or not (Figure 25).

FIGURE 25 INTENTION TO VISIT THE GRAMPIANS



Of those who did intend to visit, 32% would visit for a daytrip, 59% for a short break (2-3 days) and 10% for a longer holiday (3+ days).

Of those who had not visited the region previously, 26% indicated they had no intention to visit the region in the next 12 months, followed by 39% who were unsure.

Barriers to visiting the region

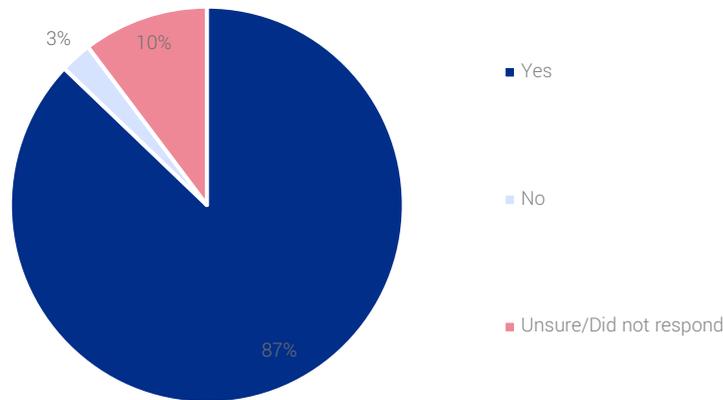
Of the 57% respondents who indicated they would not visit the region or were unsure if they would visit the region in the next 12 months, over half (59%) indicated there were barriers to them visiting, with the top five barriers:

- Having other travel plans/other places to visit (22%);
- Lack of desire or interest in visiting (16%);
- Lack of time to visit (15%);
- Financial limitations (15%) and
- A lack of information (9%).

PERCEPTION OF THE REGION

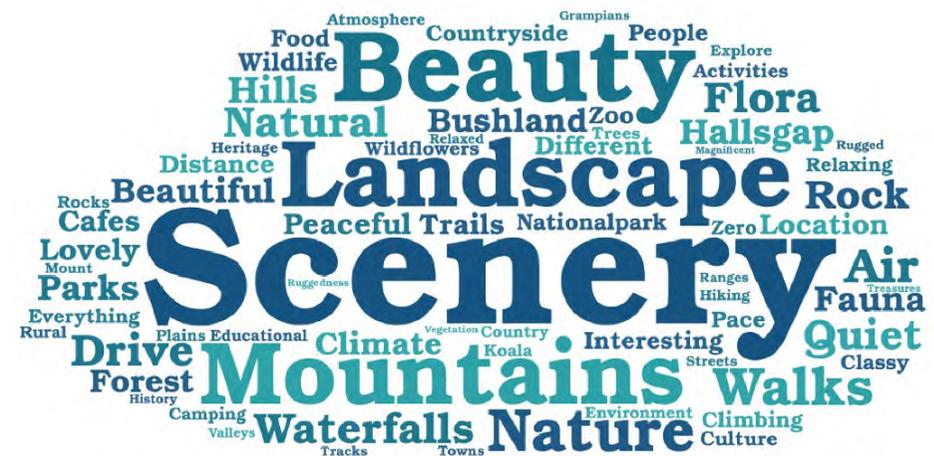
Of those who had visited the region, 87% indicated they would recommend visiting the region to family or friends (Figure 26).

FIGURE 26 PROPORTION OF VISITORS WHO WOULD RECOMMEND THE REGION TO FAMILY/FRIENDS



Respondents identified a range of key words/attributes that they believed made the Grampians unique, with the most commonly mentioned the region’s scenery and natural landscape, it’s beauty and mountains. Figure 27 shows weighted range of key/words/attributes identified.

FIGURE 27 WHAT IS UNIQUE ABOUT THE REGION



Nature based attractions and activities were most strongly associated with the Grampians including:

- **Attractions** - The National Park, Mountains, lakes, Flora and fauna, waterfalls, Scenic views, geology
- **Activities** – Camping, bush walking, hiking, horse-riding, Rock-climbing.

Built attractions and events and identified included the Stawell Gift; The Halls Gap Zoo, Aradale and J-Ward, wineries and food and wine festivals.

PRODUCT DEVELOPMENT IN THE REGION

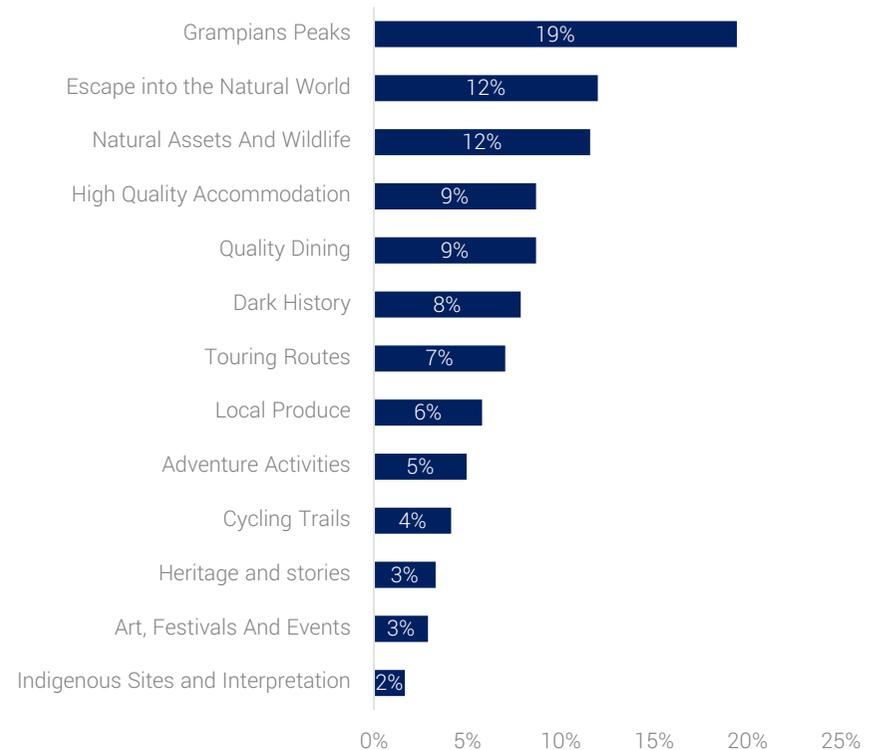
Respondents were asked to identify which of the following products and experiences (if developed) would most motivate them to visit the Grampians:

- Quality dining experience featuring local produce (**Quality Dining**);
- Discover cycling trails in the region with views of the majestic Grampians that link the region's towns and villages (**Cycling Trails**);
- Hiking the Grampians Peaks with breathtaking scenery and quality overnight stopovers (**Grampians Peaks**);
- Escaping into the natural world, camping by the water, fishing and disappearing for a few days (**Escaping into the Natural World**);
- Learn about the regions significant Indigenous history through exploring ancient sites and contemporary interpretation alike (**Indigenous Sites and Interpretation**);
- Discover the range of high-quality local produce on offer, including experiencing tasting trails, cellar doors and seasonal events (**Local Produce**);
- Participate in high adrenaline adventure activities (**Adventure Activities**);
- Visit contemporary arts galleries and attend events such as music festivals, live performances, projections and installations (**Art, Festivals and Events**);
- Stay in high quality visitor accommodation in a high-quality natural setting (**High Quality Accommodation**);
- Learn about the settlement of the region, exploring heritage streetscapes and stories (**Heritage and stories**);
- Experience the dark history of the region, including old gaols, lunatic asylums and ghost tours (**Dark History**);
- Tour routes, linking sites to create a trip that allows you to experience the diversity of the region and its surrounds (**Touring Routes**); and
- Exploring and learning about the region's natural assets, including meeting wildlife (**Natural Assets and Wildlife**).

Hiking the Grampians Peaks with breathtaking scenery and quality overnight stopovers (**Grampians Peaks**) was identified as the most motivating experience (19%

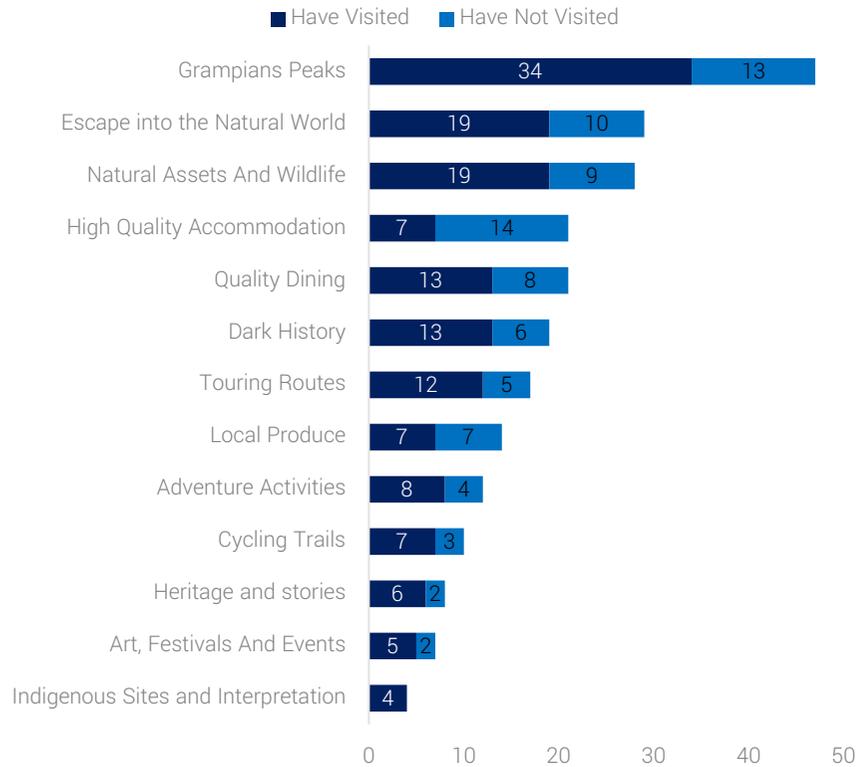
of respondents), followed by 'Escaping into the natural world, camping by the water, fishing and disappearing for a few days (**Escaping into the Natural World**)', and 'Exploring and learning about the region's natural assets, including meeting wildlife (**Natural Assets And Wildlife**)', both 12% (Figure 28).

FIGURE 28 PRODUCT/EXPERIENCE THAT WOULD MOST MOTIVATE VISITATION
BY %



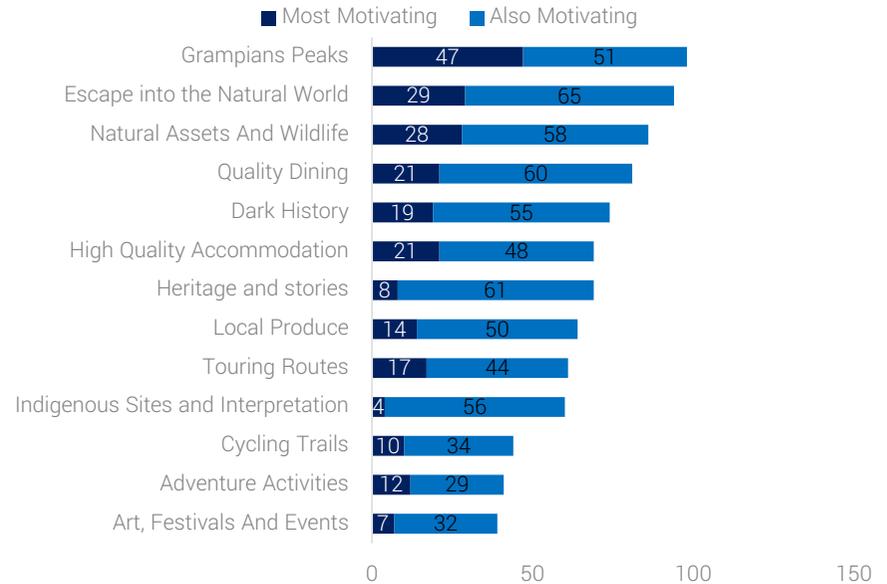
When comparing responses of those who had vs those who had not previously visited (Figure 29), it was identified that most of the top responses were driven by those who had previously visited the region; with the exception of 'Stay in high quality visitor accommodation in a high-quality natural setting', where 14 (or 67%) of the responses were attributable to those who had not previously visited the region.

FIGURE 29 PRODUCT/EXPERIENCE THAT WOULD MOST MOTIVATE VISITATION - HAD/HAD NOT VISITED COMPARISON BY NUMBER OF RESPONSES



Respondents were also asked to identify which other products/experiences on the list would also motivate them to visit (multiple responses allowed). Figure 30 provides the number of responses for each product/experience both for those who identified it as the 'most motivating', and for those who identified it as 'also motivating'. Interestingly, although both 'Learn about the settlement of the region, exploring heritage streetscapes and stories (Heritage and Stories)' and 'Learn about the regions significant Indigenous history through exploring ancient sites and contemporary interpretation alike (Indigenous Sites and Interpretation)' were low in terms of being the 'most motivating' product/experience (identified by 8 and 4 respondents respectively), over a quarter of remaining respondents considered them 'also motivating' (61 and 56 respondents respectively).

FIGURE 30 TOTAL MOTIVATION OF PRODUCTS/EXPERIENCES BY NUMBER OF RESPONDENTS

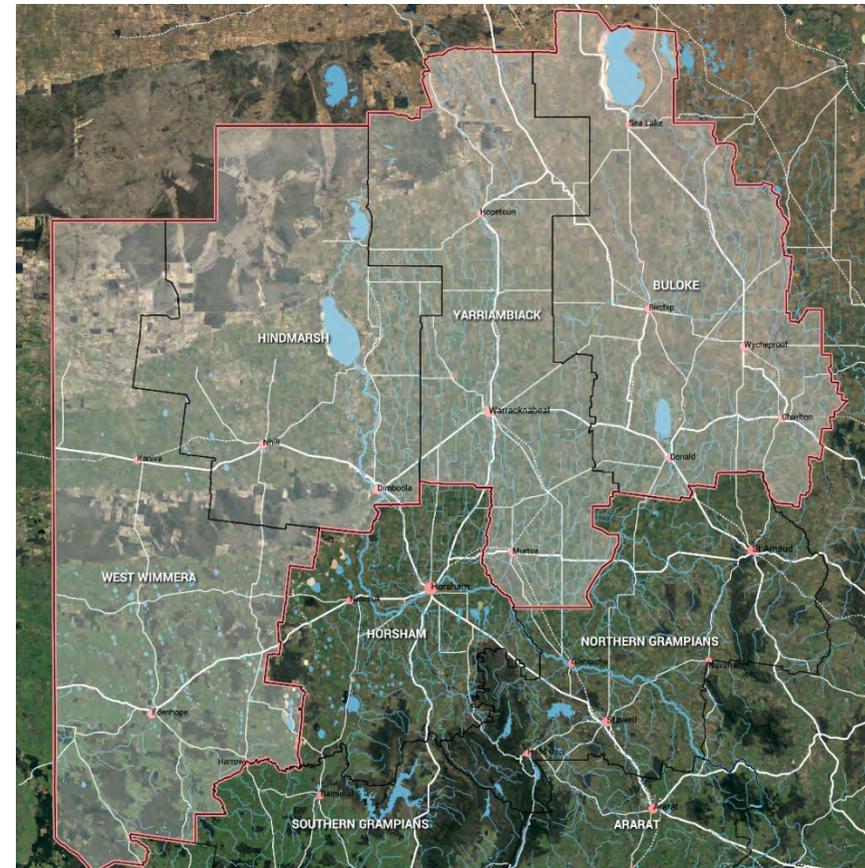


4. WIMMERA MALLEE

The Wimmera Mallee borders South Australia to the west and comprises the northern half of the WSM region and includes the four LGAs of Buloke, Hindmarsh, West Wimmera and Yarriambiack.

- **Buloke** – Donald is the major township in the LGA and is located just over 3 hours and approximately 280 kms from both Melbourne and the large regional city of Mildura. Other key townships in the LGA include Wycheproof, Birchip and Charlton, as well as Sea Lake which is located 2 hours from Mildura and is a growing tourism town owing to its close proximity to Lake Tyrrell.
- **Hindmarsh** – Nhill is the largest township in Hindmarsh and is located just over 3.75 hours or 353 kms from Adelaide and 4.25 hours or 374 kms from Melbourne. Other key townships in the LGA include Dimboola, Jeparit and Rainbow.
- **West Wimmera** – West Wimmera is the Wimmera Mallee’s gateway to South Australia, with key townships Edenhope and Kaniva closer to the South Australian capital of Adelaide than to Melbourne. Kaniva is Located 3.5 hours or 315 kms from Adelaide, and 4.75 hours or 440 kms from Melbourne, with Edenhope just over 4 hours or 385kms from Adelaide and 4.5 hours or 395 kms from Melbourne. Goroke is another key township in the region, and the closest link through to Melbourne (4.25 hours).
- **Yarriambiack** – Warracknabeal is the largest population centre of the Wimmera Mallee and is located 3.75 hours or 339kms from Melbourne and just over 4.5 hours or 430 kms from Adelaide. It is located just over 2.75 hours from Mildura. Other key townships in the LGA include Hopetoun, Patchewollock and Rupanyup.

FIGURE 31 WIMMERA MALLEE



Source: Urban Enterprise, 2018

4.1. KEY FINDINGS

The Wimmera Mallee region is bounded by the Grampians to the south, the Mallee to the north and the South Australian border to the west. The Wimmera Mallee historically has attracted little investment in tourism and has largely leveraged from its nature based assets and visitors touring through the region. The development of the Silo Art Trail and emergence of Lake Tyrrell has created two internationally renowned assets for the Wimmera Mallee.

The Wimmera Mallee historically has attracted little investment in tourism and has largely leveraged from its nature based assets and visitors already touring through the region. The development of the Silo Art Trail and emergence of Lake Tyrrell has created two internationally renowned assets for the Wimmera Mallee.

Across the whole region, Nature & Parks and Rivers & Waterways were identified as the primary product strengths for the Wimmera Mallee, with the Little Desert National Park, Big Desert Wilderness Area, Wyperfeld National Park, Wimmera and Glenelg Rivers', and Lakes' Tyrrell, Hindmarsh, and Albacutya identified as key assets for investment.

Arts and culture is a key secondary, but developing strength within the region with the emergence of the Silo Art Trail. Activating and enhancing this trail and connecting it to other arts experiences in the region presents a significant opportunity for product development.

There is a need for greater investment in tourism product by the tourism sector, the private sector and by LGA's within the region, in order to adequately build the industry base to effectively service the tourism growth which will be driven by leveraging the Silo Art Trail and Lake Tyrrell, in particular to satisfy the expectations of growing markets such as international visitors.

This includes greater investment in tourism product that leverages from these attractions; and other nature based assets in the region, as well as within the

villages and townships of the region particularly those in close proximity to the Silo Art Trail installations.

4.2. GOVERNANCE

4.2.1. WIMMERA MALLEE TOURISM

Wimmera Mallee Tourism is the peak tourism body for the Wimmera Mallee, which covers the Councils of Buloke, Hindmarsh, West Wimmera and Yarriambiack. It was incorporated as an (unofficial) Regional Tourism Organisation (RTO) in 2011, to provide a greater focus on tourism development and marketing needs for the area.

It is supported by member Councils with a total financial contribution of \$24,000 per annum (\$6,000 from each Council) and is governed by a Committee of Management, comprising representatives from each Council. However, there is no full-time dedicated resource working for the organisation.

4.3. STRATEGIC CONTEXT

This section provides an outline of the key tourism policy and research documents that currently provide tourism and economic development direction across the Wimmera Mallee region. This includes regional tourism organisations and local government plans and policy.

4.3.1. SUB-REGIONAL

WIMMERA MALLEE TOURISM, MARKETING PLAN, 2013-2015

The Wimmera Mallee Tourism Marketing Plan 2013 to 2015 was developed by the Wimmera Mallee Tourism Association and outlines marketing actions for the region

from 2013 to 2015. The Plan also supports the organisation's Strategic Plan 2013 to 2015. The key target markets identified in the Marketing Plan are:

- Grey Nomads;
- 40+ couples with children; and
- 30+ couples with no children.

For each of the above target markets the Marketing Plan identifies accommodation preferences and lifestyle segments.

The marketing mix provided in the Plan included:

- Product – *'Victoria's Wild West', focusing on experiences that visitors will come across while in the region rather than individual products.*
- Place – *Identifies the location of the region, natural-based assets and as a friendly region.*
- Price – *Identifies the Wimmera Mallee as an affordable destination.*
- Promotion – *Identifies the methods in which target markets will be targeted, including through social media, emails and brochures.*
- People – *Identifies the members of the Wimmera Mallee Tourism committee and stakeholders including Tourism Victoria and Parks Victoria.*
- Process / Performance – *Outlines the methods in which the success of the Marketing Plan will be measured.*

WIMMERA MALLEE TOURISM, STRATEGIC PLAN, 2013-2015

The Wimmera Mallee Tourism Strategic Plan 2013 to 2015 identifies key strengths, weaknesses, opportunities and threats to tourism in the region. The Plan also provides a series of actions to support and increase tourism in the region.

Key strengths identified include its nature based assets, photo locations, events and social media. Key weaknesses identified include limited accommodation, funding, highway and town signage and low visitor numbers. Opportunities identified include agritourism, ecotourism, touring trails, the Grampians, social media and groups including caravan clubs, motorbike clubs and school groups. Identified threats to tourism in the region include a declining population, council support (financial) and

apathy and complacency. Other threats included the condition of the road network the cost of fuel and limited public transport.

The key goal of the plan is to achieve a thriving tourism industry. The following actions/methods were identified to achieve this goal:

- Appointment of an Executive Officer of Wimmera Mallee Tourism;
- The Wimmera Mallee Tourism website;
- Promotion of existing attractions and nature based assets;
- Promotion of local events and produce;
- Active social media promotion;
- Informed business operators;
- Establishment of a communicative tourism network; and
- Active promotion of the region to clubs and organisations.

WIMMERA MALLEE TOURISM STRATEGIC PLAN 2017 TO 2021

The Wimmera Mallee Tourism Strategic Plan 2017 to 2021 identifies key strengths, weaknesses, opportunities and threats to tourism in the region. The Plan also provides a series of actions to support and increase tourism in the region.

The Plan identified 7 underlying influences which informed the preparation of the plan and are:

1. Wimmera Mallee Personality;
2. Industry Development;
3. Environmental;
4. Climate Change;
5. Product Investment;
6. Stakeholders;
7. Digital Landscape

The Plan covers four areas which each have a series of objectives, themes and corresponding actions to promote and support tourism in the region, including increasing visitor numbers, expenditure and length of stay. The four areas are:

8. Marketing: Objectives include raising the profile of the region, increase expenditure and length of stay through moving visitors throughout the region and through marketing campaigns increase visitor numbers;
9. Product Development: Objectives include supporting the development of new products (to increase visitor numbers);
10. Relationships: Objectives include increased advocacy, increased skill training, attracting events to the region and stronger relationships with stakeholders such as regional tourism organisations and local operators.
11. Governance: The objective is to ensure professional standards within the organisation are maintained.

A number of plans have been completed for the Wimmera Mallee region by Wimmera Mallee tourism, however an overarching DMP to guide product development and collaboration is a key gap. This includes collaboration both within the region, and with neighbouring regions.

4.3.2. LOCAL

A range of relevant local policies for each LGA were also reviewed and key findings can be found in the Issues and Opportunities Report that preceded this DMP.



Source: Wimmera Mallee Tourism, 2016

4.4. VISITOR EXPERIENCE AND PRODUCT PROFILE

This section provides an outline of the existing products and experiences across the Wimmera Mallee region that support the visitor economy.

4.4.1. ARTS, CULTURE AND HERITAGE

There are a range of arts, culture and heritage assets throughout the Wimmera Mallee region.

Art, culture and heritage is a key strength of Yarriambiack, with the Silo Art Trail (the largest outdoor art gallery in Australia) spanning across the local government area. Other assets within the Shire include the national heritage listed Murtoa Stick Shed; as well as the Warracknabeal Historic Centre, Water Town and Court House; Stockman's Hut Gallery; Minyip Flying Doctors Memorabilia and Heritage Walk; Dunmunkle Sumpoilers Engines Museum; Water Tower Museum; Concordia Memorial Cottage and Bell Tower; Wheatlands Warracknabeal Agricultural Machinery Museum; Cronomby Tanks Recreation Reserve; Historical Society (CFA building); Woomelang Shearing Shed; CFA Mural; the Old Flour Mill; Farrer Monument and the Wood's Farming and Heritage Museum:

Arts and Cultural assets in Hindmarsh include the John Shaw Neilson Cottage in Nhill, a key asset of the Hindmarsh area dedicated to poet, John Shaw Neilson, Gallery Central in Nhill, Australian Pinball Museum in Nhill, Nolan Studio and the murals in Rainbow. Heritage assets include the Iverness Motors Museum, Wimmera Mallee Pioneer Museum, Dimboola Print Museum, Yurunga Homestead, a 100-year-old homestead located in Rainbow, Dimboola Railway Precinct, the Heritage Trail Town walk and the Robert Menzies Memorial and Menzies square which celebrate the legacy of Australia's longest serving Prime Minister.

Hindmarsh also has a strong existing aviation heritage, linked to WWII. Key existing assets include the Nhill Aviation Heritage Centre which pays tribute to the 10,000 young men and women who trained at the Nhill Aerodrome RAAF base during the war, and the practice bombing range can be explored by 4x4 or by foot where RAAF

pilots flew practice bombing raids from the Nhill base across the scrub which now forms part of the Little Desert National Park.

There are several arts, culture and heritage assets located in Buloke Shire including the Rex Art Deco Cinema in Charlton and numerous museums including Donald Agricultural Museum, Charlton Golden Grains Museum and the Wilandra Farm Museum, the Birchip History Museum, Nullawil's Auchmore Museum and Sea Lakes' Skymirror Gallery. Other assets include the Iron Man sculpture in Nullawil and arts and craft in Charlton, as well as many heritage buildings throughout the region such as the art deco buildings located in Wycheproof township.

The arts, culture and heritage assets across West Wimmera include many museums such as the Transport Museum, Kaniva Museum and Kaniva Car Museum, Johnny Mullagh Cricket Centre, Red Tail Art Gallery, Discovery Centre in Harrow and the Aboriginal Cricket Trail, Edenhope College Oval (Cricket History); Jane Duff Memorial and information display; woolsheds and homesteads as well as Chinese and Gold Rush history. Other assets include street murals illustrating scenes from the town's early years of development.

SILO ART TRAIL

Starting with the silo in Brim, the Silo Art Trail was conceived in 2016 and is Australia's largest outdoor gallery. It currently stretches over 200 kilometres through Yarriambiack Shire, with painted silos currently in Brim, Lascelles, Patchewollock, Rosebery, Rupanyup and Sheep Hills. The project saw a team of renowned artists from Australia and across the world visit the region, meet the locals and transform each grain silo into an epic work of art; each one telling a unique story about the host town. Artists included Fintan Magee (Patchewollock), Adnate (Sheep Hills), Julia Volchkova (Rupanyup), Rone (Lascelles), Kaff-eine (Roseberry), and Guido van Helten (Brim). Recent funding has been secured for art works on silos at Serviceton, Kaniva, Goroke and Nullawil.

INDIGENOUS

Indigenous cultural sites and artefacts are an important yet underutilised strength of the Wimmera Mallee region with one of the major assets of the region, Lake Tyrrell, recognised as the site of oldest known evidence of human habitation in Victoria and Tasmania. Other key assets include the Wimmera River (known to Traditional Owners as Barringgi Gadyin) and associated environs such as Horseshoe Bend in Dimboola; Ebenezer Mission in Antwerp; the Corroboree Ground situated around the Nhill Lake and Swamp area; the Canoe Tree located at Jaypex Park, Nhill; as well as numerous scar trees through the region.

The township of Harrow in particular also has significant indigenous history, including the Johnny Mullagh indigenous cricket story, with township assets including the Harrow Discovery Centre (including the Johnny Mullagh Cricket Centre and the Harrow by Night – Sound and Light Show) and nearby Johnny Mullagh Memorial Park.

The Silo Art Trail is a key emerging strength of the region, presenting a significant opportunity to drive visitation and yield through promotion and packaging of the World's Largest Outdoor Gallery.

Sensitive development and interpretation of Indigenous culture and heritage also presents significant opportunity for the region, as recognised in the Wotjobaluk Country Indigenous Tourism Report, which identified a number of potential projects for the region.

4.4.2. NATURE BASED & WATERWAYS

Major assets of the Wimmera Mallee region include Lake Tyrrell, Little Desert National Park, Big Desert Wilderness Area, Wyperfeld National Park and Goroke State Forest.

The natural environment is a key feature of Buloke Shire, with the region offering a number of sunrise and/or sunset and stargazing opportunities including at Lake Tyrrell and Sea Lake (with the region known as 'Big Sky Country'). Mount

Wycheproof, the world's smallest mountain, is also a key feature of the Shire with a range of activities able to be undertaken at the mountain including walks and tours as well as cultural events.

A key strength of Hindmarsh is the region's natural assets including Little Desert National Park, Wyperfeld National Park, Lake Albacutya and Lake Hindmarsh, the largest freshwater lake in Victoria. Other nature based and waterway assets include Pink Lake in Lochiel, the Wimmera River, Kumbala Native Garden, and Snape Reserve.

Across West Wimmera, natural assets include Broughtons Waterhole in Little Desert National Park, the Border Track and other tracks in the Big Desert Wilderness Area and the many lakes within the region including Lake Charlegrark, Lake Wallace, Lake Bringalbert and Lake Ratzcastle.

Wetlands, Red Bluff Nature Conservation Reserve, Bailey's Rocks in Dergholm State Park and Goroke State Forest are all key nature based assets of West Wimmera Shire. The Glenelg River in particular, follows the Shire's southern boundary from Harrow through to Dergholm, and has a platypus population and significant tourism potential.

Key nature based assets within Yarriambiack Shire include Wyperfeld National Park, Big Desert Wilderness Area, Lake Corrong and the night sky which offers stargazing opportunities. There are also numerous nature reserves located in Yarriambiack including Paradise Flora and Fauna Reserve, with other assets including Wathe Flora and Fauna Park, Lake Marma and Rabl Park, and Jack Emmett Billabong.

BIG DESERT WILDERNESS AREA

Big Desert was the first place in Victoria to be declared a wilderness area, with the area home to wide variety of birds, reptiles and mammals. The park is said to provide a challenge for the experienced hiker, offering a rare opportunity to experience a landscape largely unaffected by human activity, with other popular recreational activities including bird watching, camping. The Border Track is a key feature of the park and offers 4WD touring.

LITTLE DESERT NATIONAL PARK

Little Desert National Park is a major asset of the Wimmera Mallee region, spreading across West Wimmera Shire into Hindmarsh Shire. The Park is a unique desert environment with a range of soil types causing marked differences in vegetation, including extensive wildflower blooms from late winter to early summer.

Popular recreational activities able to be undertaken in the park include 4WD, bushwalking, hiking, picnicking, and birdwatching. The Park is also popular for camping, including at Horseshoe Bend, Ackle Bend and Kiata campgrounds. Little Desert Nature Lodge also provides accommodation nearby the Park, attracting many international visitors, as well as conservation groups and school groups whilst under the management of Conservation Volunteers Australia (CVA). New ownership is currently being sought for the lodge, presenting a significant product development opportunity.

Marked signposted walks within the Park include the 74 km Desert Discovery Walk, Stringybark Walk, Sanctuary-Keith Hateley Nature Walk, Pomponderoo Hill Nature Walk, and Yanipy Walk.

LAKE TYRRELL

Getting its name from 'Tyrille', an aboriginal word meaning sky or space, Lake Tyrrell is Victoria's largest inland salt lake and is famed for its beautiful scenery and unique photographic opportunities. Providing a sense of perspective, the reflective nature of the lake bed provides a unique photo location, with the lake reflecting the sky above. The Lake is a key draw card for tourists, local and international alike with many visiting the lake at sunrise and sunset. The quality and clarity of the night sky views at the Lake provide an opportunity to promote and gain formal recognition for the area as a Dark Sky Site.

WYPERFELD NATIONAL PARK

Wyperfeld is the largest of the three significant parks in the Wimmera Mallee region, however is perhaps the least known, with the closest townships being the small centres of Patchewollock, Rainbow, Yaapeet and Hopetoun.

Unique features of the park include the central chain of lake beds connected by Outlet Creek, the northern extension of the Wimmera River, and one of the largest white sand dunes in the Snowdrift area.

Camping areas in the park include Wonga camping area in the south, and Casuarina and Snowdrift camping areas in the north.

Existing walks within the park include Discovery Walk, Tyakil, Desert Walk, and Eastern Lookout via Lignum Track (which is also available as a drive – Eastern Lookout Nature Tour).



Source: 4x4earth, 2011

WETLANDS

The WCMA estimates that seventy-five percent of the region's wetlands comprising more than 2,000 individual wetlands are concentrated in the south-west Wimmera wetlands system, west of Horsham and south of the Little Desert (Figure 32), with West Wimmera Shire alone comprising 25% of Victoria's wetlands. Approximately 200 of these are in the Natimuk-Douglas Depression with the rest in the South West Wimmera System, which encompasses West Wimmera Shire.⁷ Less than ten percent of the wetlands are on public land.

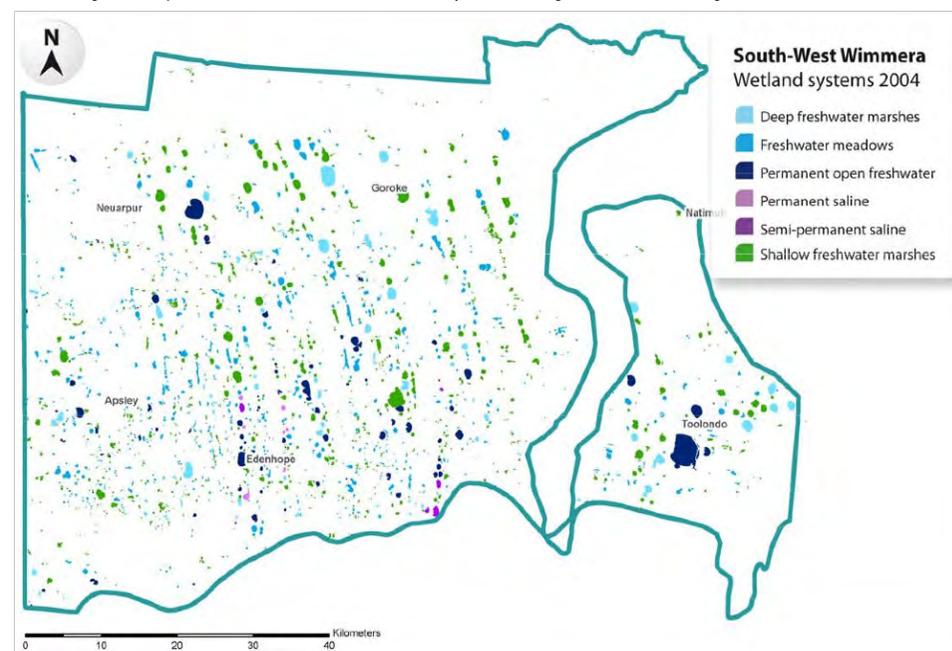
It is identified that wetlands range in size from one hectare to almost 500 hectares.

The Terminal Lakes System of the Wimmera River is also a significant wetland system within the Wimmera Mallee region, with Lake Albacutya recognised internationally under the Ramsar Convention as a wetland of international significance, and Lake Hindmarsh Victoria's largest natural freshwater body.

These wetlands support a diverse flora and fauna, as well as a range of recreational uses.

In particular the wetlands and lakes of the south-west Wimmera wetlands system are noted as being very significant tourism drivers for West Wimmera Shire in particular.

FIGURE 32 SOUTH WEST WIMMERA WETLAND SYSTEM



Source: Wimmera CMA Wimmera Wetland Strategy, 2011

Changing climate conditions is a key issue for consideration, with many of these lakes and swamps now dry more often and for longer periods, and also affected by issues such as Blue Green Algae outbreaks. This creates challenges that impact on tourism and reduce visitor numbers to water based attractions and events (e.g. Country Music Marathon at Lake Charlegrark), necessitating the creation of attractions and activities that are not effected by water quality/level.

⁷ Wimmera CMA Wimmera Wetland Strategy 2011

WIMMERA RIVER ENVIRONS

The Wimmera River and surrounding environs are also a significant asset for the Wimmera Mallee region, however one which is also currently underutilised. Forming the eastern boundary of the Little Desert National Park, the 278km river flows from the Pyrenees and the northern slopes of the Great Dividing Range, with its mouth at Lake Hindmarsh near Jeparit (and also draining into Lake Albacutya). It provides a key link between the Grampians and the Wimmera Mallee, passing through both Dimboola and Horsham townships.

Yarriambiack Creek, which is a distributary of the Wimmera River, is also noted as being a key community and visitor recreational asset for Yarriambiack Shire.

The nature based assets of the Wimmera Mallee region are a key strength with its many lakes, rivers, and wetlands as well as desert environs and national parks. Associated product development and supporting infrastructure is needed to leverage from these assets to increase visitation and visitor yield.

4.4.3. OUTDOOR ADVENTURE, SPORT AND RECREATION

With the breadth of nature based assets available across the region, there are a range of outdoor adventure, sport and recreation activities and products. These include:

- Watersport activities including water skiing, boating and fishing across assets such as Wimmera River, Nhill Lake, Wooroonook Lakes, Green Lake, Watchem Lake and Tchum Lake as well as a number of other weir pools, lakes and wetlands within West Wimmera and Yarriambiack Shires. A number of these also support associated activities such as bird watching and duck hunting;
- Hiking and 4WD tracks across a number of parks and reserves including within Mount Jeffcott Wildflower Reserve; Wyperfeld National Park and over the desert sand dunes within Little Desert National Park (4WD);
- Walking and cycling tracks across the region including the Nine Creeks Track located on the Wimmera River (in Dimboola); Murrayville Track in the Big Desert Wilderness Area; Yarriambiack Creek Walking Track; and Jack's Track, a 3km loop through bushland and wetlands in Rupanyup; and

- Camping including within Wyperfeld National Park, Little Desert National Park, and Big Desert Wilderness Area.

There are also a range of community sport and recreation facilities across the region including golf clubs, bowling clubs, football/netball/tennis facilities, skate parks, and racetracks.

4.4.4. TOURING

Christians Bus Company currently runs bus tours that pass through the region and are conducting a new Silo Art Tour in September of 2018 with a capacity of 40 people. The primary current market for their tour product is retirees from surrounding regional Victoria destinations. They are interested in developing new tour product within the region, with a need to source local information regarding existing product and attractions, and/or to include an indigenous component. Sea Lake Tyrrell Tours also operate out of Sea Lake. An indigenous interpretation bus tour has also recently started operation in the region.

Grampians Helicopters offers tours to the Silos from their base near Halls Gap. A. Kube Aviation based in Nhill offer scenic flights from Horsham and Nhill airports of the lakes and landscapes of the region.

A number of licensed tour operators also operate within the Parks Victoria managed parks across the region.

4.4.5. FOOD, WINE AND AGRITOURISM

The current food and agritourism offer across the region is limited, however the region has a strong agricultural industry including being a major grains producer. Current operators of note include Rainbow Brewery (opening soon), Nicolas Olive Estate in Dimboola, and Rupanyup Living (retailer of local produce). Food producers in the region include Luv a Duck based in Nhill, the Lentil Company, and Wheaton's Store (pork) north of Kaniva. There is also an artisan food producers' group that are looking to increase their presence.

4.4.6. FESTIVALS AND EVENTS

Table 19 provides an overview of some of the key events and festivals across the region by location and type.

Each LGA also hosts a number of smaller events including agricultural shows across the region and markets which primarily service the local community.

TABLE 19 KEY EVENTS BY LGA

EVENT	TYPE	LOCATION	MONTH
BULOKE			
Skeeter Gimshaw Motor Cycle Rally'	Sport & recreation	Charlton	February
Sea Lake Mallee Rally	Sport & Recreation	Sea Lake	June
Cuisine in the Crop	Food, & Wine	Donald	September
Mount Wycheproof Cup	Sport & Recreation	Wycheproof	November
Birchip B & S Ball	Lifestyle	Birchip	October
Esoteric Dance and Music Festival	Music	Donald	March
HINDMARSH			
Dimboola Human Powered Vehicle Expo	Sport & Recreation	Dimboola	August
Dimboola Rowing Regatta	Family & Lifestyle	Dimboola	November
Jeparit Fishing Competition	Sport & Recreation	Jeparit	Easter
Nhill Golf Club Annual Tournament	Sport & Recreation	Nhill	March
Dinner on the Lake	Food, & Wine	Dimboola	November
Jim's Butchery Nhill Cup	Equestrian	Nhill	December
Rainbow Desert Enduro	Sport & Recreation	Rainbow	August
Rainbow Desert Rises 240	Sport & recreation	Rainbow	March
WEST WIMMERA			
Henley on Lake Wallace	Family & Lifestyle	Edenhope	February

Harrow National Bush Billycarts Championship	Sport & Recreation	Harrow	March
Harrow Vintage Enduro	Sport & Recreation	Harrow	August
Lake Charlegrark Country Music Marathon	Music	Minimay	February
Johnny Mullagh Championship Weekend	Family & Lifestyle	Harrow	March
Apsley Cup	Sport & Recreation	Edenhope	June
Edenhope Annual Fishing Competition	Sport & Recreation	Edenhope	November
Kaniva Car and Bike Show	Sport & Recreation	Kaniva	February
Edenhope Races	Sport & Recreation	Edenhope	March
YARRIAMBIACK			
Y-Fest Easter Festival	Family & Lifestyle	Warracknabeal	Easter
Mallee Machinery Field Days	Agricultural	Speed	August
Murtoa's BIG Weekend	Family & Lifestyle	Murtoa	October
Patchewollock Music Festival	Music	Patchewollock	October
Dirt Music Festival	Music	Rupanyup	April
Barley Banquet	Food, & Wine	Rupanyup	October

Events play an important role within the visitor economy, helping to grow visitation and awareness, particularly in regional destinations. Growing the events industry and calendar across the Wimmera Mallee region will play an important role in leveraging from short term product investment projects associated with the Silo Art Trail and Wimmera River Discovery Trail, and should be developed in conjunction with other regional industry capacity and promotion projects to ensure the region can adequately attract and service events visitors.

4.4.7. ACCOMMODATION

Table 21 overleaf provides a list of existing accommodation providers identified in the key townships of each LGA within the Wimmera Mallee region.

AIRBNB

Overall there were 19 active hosts across the Wimmera Mallee region identified from available data. Table 20 provides a breakdown of available properties by LGA. Key findings for each LGA were:

Buloke

9 entire homes and 26 rooms were listed on Airbnb in Buloke Shire with an occupancy rate of 38%. The average daily rate was \$215 with 77% of rentals available year-round.

Hindmarsh

In Hindmarsh Shire, 3 entire homes and 3 private rooms were listed on Airbnb. The average daily rate was \$100. Across the LGA:

- The occupancy rate was 33%; and
- 25% of rentals were available year round.

Although there is currently no Airbnb data available on AirDNA for Yarriambiack and West Wimmera Shires, a total of 9 properties were identified for Yarriambiack on Airbnb and 2 for West Wimmera Shire.

TABLE 20 AIRBNB PROPERTY CHARACTERISTICS BY LGA

	ENTIRE HOMES	PRIVATE ROOMS	AVERAGE DAILY RATE	OCCUPANCY RATE	% AVAILABLE FULL TIME	# OF HOSTS
Buloke	9	26	\$215	38%	77%	13
Hindmarsh	3	3	\$100	33%	25%	6
West Wimmera	No data available					
Yarriambiack	No data available					

Source: AIRDNA, 2018.

TABLE 21 IDENTIFIED ACCOMMODATION IN KEY TOWNSHIPS BY LGA

BULOKE	HINDMARSH	WEST WIMMERA	YARRIAMBIACK
<p>Sea Lake</p> <ul style="list-style-type: none"> Sea Lake Motel Lake Tyrrell Accommodation Sea Lake Hotel Skymirror Guest House Airbnbs (approximately 7) 2 new accommodation venues at Sea Lake awaiting approval (Caravan park at lake and 18 cabins in the township) <p>Donald</p> <ul style="list-style-type: none"> Donald Riverside Motel Donald Lakeside Caravan Park Golden Chain Donald Motor Lodge Bullocks Head Tavern and Accommodation Donald Hotel <p>Charlton</p> <ul style="list-style-type: none"> Charlton Motel Foundry Palms Motel East Charlton Hotel <p>Birchip</p> <ul style="list-style-type: none"> Birchip Hotel Birchip Motel Caravan Park <p>Berriwillcock</p>	<p>Nhill</p> <ul style="list-style-type: none"> Acacia Motor Inn @ Nhill Nhill Oasis Motel Zero Inn Motel Union Hotel Nhill Motel Wimmera Nhill Caravan Park Little Desert Nature Lodge Wendy's Retreat Nhill Airbnb, Nhillbilly Farm <p>Dimboola</p> <ul style="list-style-type: none"> Motel Dimboola Victoria Hotel Dimboola Riverside Holiday Park Dimboola <p>Jeparit</p> <ul style="list-style-type: none"> Jeparit Caravan Park Four Mile Beach Camp Ground, Lake Hindmarsh <p>Rainbow</p> <ul style="list-style-type: none"> Rainbow Motel Lodge Pot of Gold Eureka Hotel (newly renovated) Campgrounds at Lake Albacutya Park including Western Beach, Yaapeet Beach and O.T.I.T; and Lake Hindmarsh 	<p>Edenhope</p> <ul style="list-style-type: none"> Edenhope Lakeside Tourist Park Edenhope Motor Inn 'Two Fat Ducks' Higgelty Piggelty B&B Lake Wallace House Lake Wallace Hotel <p>Kaniva</p> <ul style="list-style-type: none"> Kaniva Colonial Gardens Motel Kaniva Midway Motel <p>Goroke</p> <ul style="list-style-type: none"> The Goroke Hotel <p>Harrow</p> <ul style="list-style-type: none"> Hermitage Hotel Mooree Cottage <p>Apsley</p> <ul style="list-style-type: none"> Ardwick B&B, and Border Inn <p>Caravan and Camping across the LGA including Johnny Mullagh Reserve and Caravan parks at Kaniva, Edenhope, Lake Ratzcastle, Goroke and Lake Charlegrark</p>	<p>Warracknabeal</p> <ul style="list-style-type: none"> Country Roads Motor Inn Warrack Motel Leura Log Cabin Wimmera Welcome <p>Hopetoun</p> <ul style="list-style-type: none"> Hopetoun Caravan Park Hopetoun Community Hotel/Motel Mallee Bush Retreat Airbnbs, Cottage On The Corner, Lakeside Holiday House, Hopetoun B&B, The Cobbler's Cottage B&B <p>Murtoa</p> <ul style="list-style-type: none"> Railway Hotel Crooked Cottage Murtoa Caravan Park Hatchett Inn Lovely Old Cottage Murtoa Farm-View Guest House Airbnbs, <p>Rupanyup</p> <ul style="list-style-type: none"> Airbnb property <p>Minyip</p>

<ul style="list-style-type: none"> • Golden Crown Hotel <p>Culgoa</p> <ul style="list-style-type: none"> • Kaneira Hotel <p>Caravan and Camping at Watchem Lake, Tchum Lake, Green Lake and Wroonook Lakes</p>	<ul style="list-style-type: none"> • Rainbow Caravan Park <p>Campgrounds in Little Desert National Park including Horseshoe Bend, Ackle Bend and Kiata campgrounds.</p>		<ul style="list-style-type: none"> • Minyip Hotel <p>Woomelang</p> <ul style="list-style-type: none"> • Woomelang Hotel <p>Caravan and Camping across the LGA. Campgrounds in Wyperfeld National Park including Wonga, Casuarina and Snowdrift.</p>
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4.5. VISITOR PROFILE

The following section provides a summary of visitation to the Wimmera Mallee, and the LGAs that comprise it, including providing a comparative overview of key visitor demographics by LGA.

NOTES ON ANALYSIS

- This assessment draws on data collected by Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS) to analyse trend and demographic data for both domestic and international visitors to the region.
- All LGA visitor and demographic data has been based on the 10-year average from 2008 to 2017 (YE December) due to low sample sizes across some LGAs.
- Percentage figures have been rounded to the nearest whole number and therefore may not equal 100%.

4.5.1. VISITATION OVERVIEW

In 2017, Wimmera Mallee received just under 500k visitors. Of these visitors the majority are domestic overnight (52%), followed by daytrip (47%). Only 1% of recorded visitors are international, however it is considered that a significant share of international visitation would remain uncaptured due to the sampling methodology utilised by TRA which would not capture international visitors conducting daytrips in the region.

SUMMARY OF VISITATION TO WIMMERA MALLEE (2017)

223,499	250,841	5,684
DOMESTIC DAYTRIP VISITORS	DOMESTIC OVERNIGHT VISITORS	INTERNATIONAL VISITORS

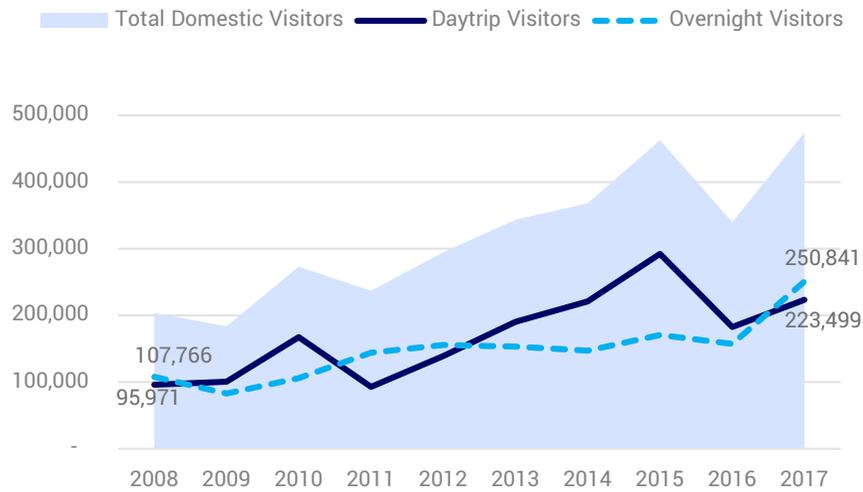
Visitation has grown significantly in the region from 200,000 total visitors in 2008 to around 500,000 visitors in 2017.

This significant growth highlights the importance of the Wimmera Mallee improving service levels of current businesses and attracting tourism operators to the region who can service the growing market.

DOMESTIC VISITORS

Domestic visitation to the Wimmera Mallee region has experienced some distinct peaks and troughs in visitation, but overall has grown strongly over the decade to 2017. Daytrip visitation in particular attracted an additional 154,870 visitors in 2017, as compared to 2008. Significantly, in 2017 the region attracted more overnight visitors than daytrip visitors (Figure 33).

FIGURE 33 DOMESTIC VISITATION TREND 2008-2017

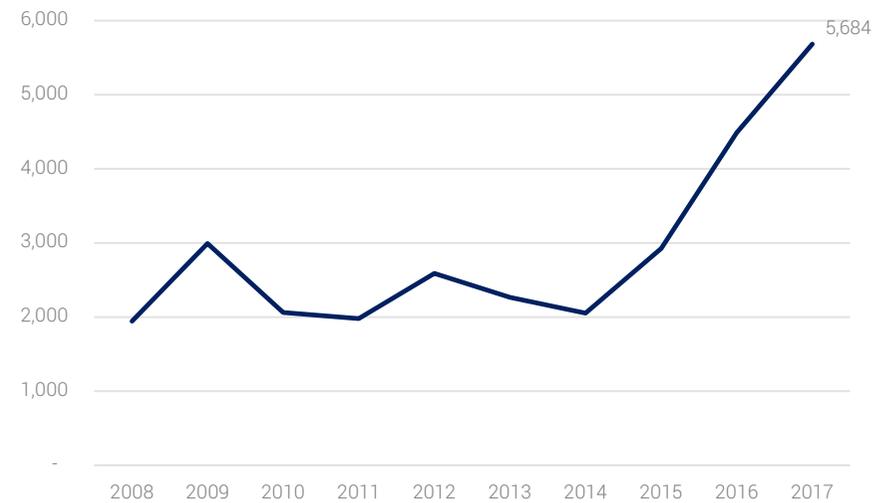


Source: TRA NVS Visitation 2008-2017 YE Dec

INTERNATIONAL VISITORS

Whilst comprising a very small proportion of visitors to the Wimmera Mallee region, the number of international visitors to the region has experienced very strong growth, more than doubling between 2014 and 2017 (Figure 34). International visitation to the region is likely to be understated due to TRA methodology and sampling limitations; with on-site visitors books and anecdotal evidence citing a marked increase in international visitation to emerging attractions such as Lake Tyrrell and the Silo Art Trail installations.

FIGURE 34 DOMESTIC VISITATION TREND 2008-2017

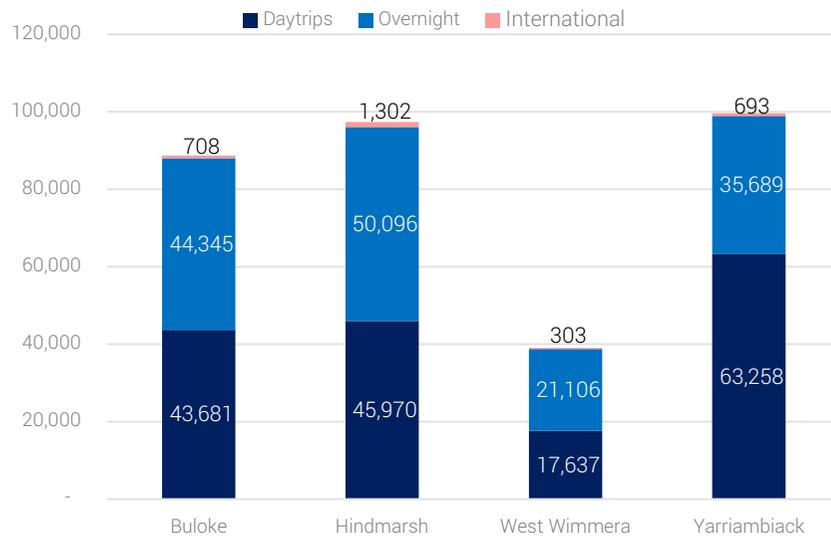


4.5.2. LGA VISITATION OVERVIEW

Figure 35 provides an overview of the average total annual visitation to each LGA within the Wimmera Mallee, between 2008 and 2017.

It shows that Yarriambiack attracted the largest overall number of visitors to the region attributable to it's high number of daytrip visitors; closely followed by Hindmarsh which attracted the highest number of domestic overnight and international visitors. West Wimmera attracted the lowest share of all three visitor markets, presumably influenced by its geographic location. Both Hindmarsh and West Wimmera attracted a higher proportion of domestic overnight visitors than domestic daytrip visitors.

FIGURE 35 10 YEAR AVERAGE BY LGA

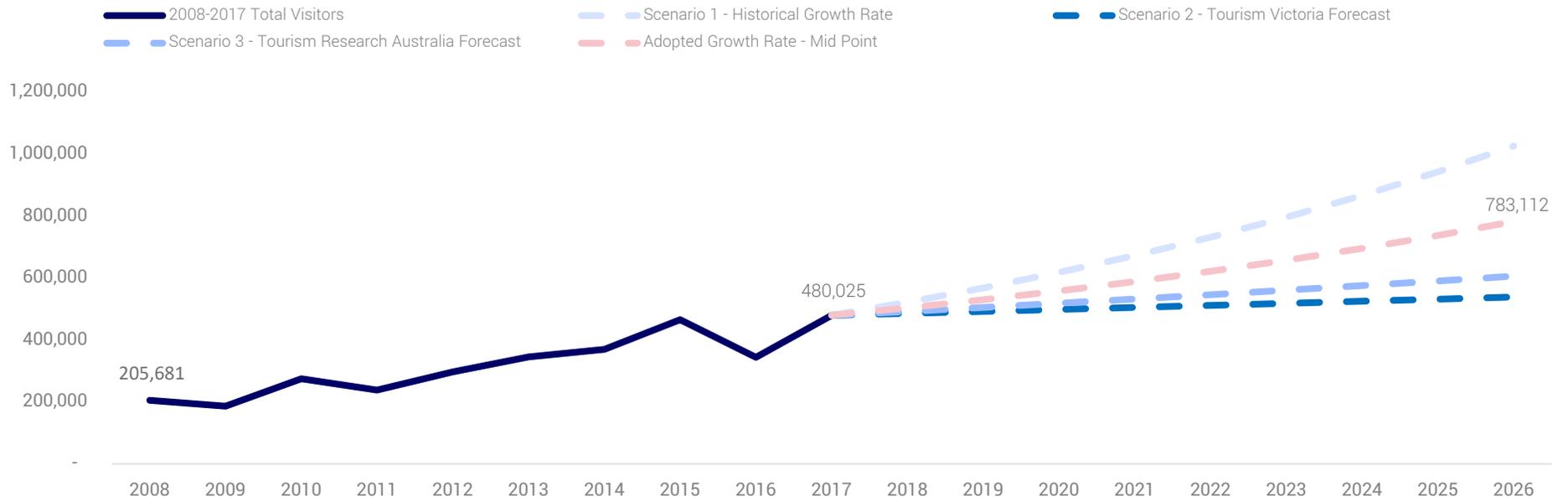


Source: TRA NVS & IVS Visitation 2008-2017 YE Dec

4.5.3. VISITOR PROJECTIONS

Figure 36 overleaf provides a projected growth scenario for the Wimmera Mallee, based on a number of visitation scenarios including historical growth and tourism forecast growth rates. It estimates that the Wimmera Mallee will attract approximately 783,112 visitors annually by 2026.

FIGURE 36 WIMMERA MALLEE VISITOR PROJECTION



Source: TRA NVS & IVS Visitation; TRA Visitor Forecasts; Tourism Victoria TEVE Research Unit, Forecast visitation to Victoria, August 2017; modelled by Urban Enterprise 2018

4.6. VISITOR DEMOGRAPHICS

Urban Enterprise conducted a review of key indicators for daytrip, overnight and international visitors to the Wimmera Mallee region by LGA. Key findings by market are outlined below, drawn from a summary table provided overleaf (Table 22).

DAYTRIP

- The region has an older daytrip demographic, with at least 50% of visitors to each LGA over 45;
- Hindmarsh has a higher proportion (24%) of young visitors (15-24), whilst West Wimmera has a higher proportion of visitors aged over 55 (53%);
- Three of the four LGAs source the majority of their visitation from Victoria, whilst West Wimmera has a vastly different daytrip visitor origin profile owing to sharing a border with South Australia, with its visitors almost evenly split between Victoria (55%), and South Australia (45%);
- Three of the four LGAs have a low proportion of holiday visitors, with the exception West Wimmera where over half of all visitors (55%) are visiting for a holiday;
- Both Buloke (38%) and Hindmarsh (37%) receive a higher proportion of Visiting Friends and Relatives (VFR) visitors;
- Low proportions of visitors are eating out during their daytrip, which is indicative of a lack of food and beverage options in each LGA, in particular Buloke Shire;
- Overall there was low activity participation by daytrip visitors; and
- West Wimmera had a high proportion of daytrip visitors attending an organised sporting event (20%), whilst Yarriambiack had a comparably high proportion of visitors going shopping for pleasure (17%) during their trip.

OVERNIGHT

- The age profile of overnight visitors across most LGAs was also predominantly older visitors,
- West Wimmera had a younger visitor age profile, with 25% of visitors aged 25-34 and 16% aged 15-24, with a lower proportion of visitors aged over 55 (29%);
- The origin profile of overnight visitors was quite varied across the four LGAs, with both Hindmarsh and West Wimmera again sourcing a significant proportion of their visitors from Adelaide (22% and 26% respectively);
- Significantly, Yarriambiack attracted 16% of its overnight visitation from NSW;
- VFR was the primary purpose of visitor for all LGAs, followed by holiday;
- Yarriambiack's purpose of visit profile was quite different to the other three LGAs, attracting significantly less holiday visitors (23%) but a higher proportion of business visitors, with 20% of overnight visitors visiting for this purpose;
- A low proportion of visitors participated in eating/dining out during their trip;
- West Wimmera had a higher proportion of visitors going bushwalking (14%), fishing (6%) and cycling (5%);
- Buloke Shire had a comparatively higher proportion of visitors (6%) attending festivals / fairs or cultural events; and
- Yarriambiack had a higher proportion of visitors who visited assets such as parks and/or nature reserves ('visiting botanical or other public gardens).

TABLE 22 LGA DOMESTIC DAYTRIP AND OVERNIGHT VISITOR DEMOGRAPHIC KEY INDICATORS

	Daytrip Visitors					Overnight Visitors				
	Indicator	BULOKE	HINDMARSH	WEST WIMMERA	YARRIA-MBIACK	Indicator	BULOKE	HINDMARSH	WEST WIMMERA	YARRIA-MBIACK
Age Structure	15-24 years	8%	24%	6%	11%	15-24 years	9%	12%	16%	20%
	25-34 years	20%	5%	3%	5%	25-34 years	15%	14%	25%	18%
	35-44 years	17%	9%	12%	21%	35-44 years	14%	17%	18%	10%
	45-54 years	20%	14%	26%	21%	45-54 years	20%	15%	13%	20%
	55+ years	35%	47%	53%	42%	55+ years	43%	42%	29%	32%
Origin State/ Country (Top)	Victoria	98%	91%	55%	98%	Victoria	84%	68%	67%	70%
	South Australia	1%	9%	45%	1%	South Australia	4%	22%	26%	8%
	New South Wales	1%	0%	0%	1%	New South Wales	8%	5%	7%	16%
						Queensland	3%	3%	0%	3%
						Other	1%	2%	1%	2%
Purpose of Visit (Top)	Holiday	31%	33%	55%	40%	Visiting friends and relatives	44%	37%	46%	48%
	Visiting friends and relatives	38%	37%	25%	26%	Holiday	38%	36%	31%	23%
	Other reason	16%	19%	7%	16%	Business	11%	14%	14%	20%
	Business	14%	11%	13%	18%	Other reason	2%	5%	7%	9%
						In transit	2%	7%	2%	0%
						Not stated/not asked	3%	1%	1%	1%
Activities (Top)	Visit friends & relatives	46%	40%	37%	26%	Visit friends & relatives	49%	38%	41%	55%
	Eat out / dine at a restaurant and/or cafe	16%	44%	34%	31%	Eat out / dine at a restaurant and/or cafe	38%	30%	42%	38%
	None of these	21%	17%	17%	23%	Sightseeing/looking around	19%	19%	14%	19%
	Sightseeing/looking around	3%	14%	9%	16%	Pubs, clubs, discos etc	21%	14%	13%	21%
	Go shopping for pleasure	10%	5%	6%	17%	None of these	12%	21%	13%	16%
	Attend an organised sporting event	3%	2%	20%	11%	Bushwalking / rainforest walks	7%	12%	14%	10%
	Pubs, clubs, discos etc	4%	0%	9%	5%	Visit national parks / state parks	6%	13%	12%	8%
	Visit history / heritage buildings, sites or monuments	2%	1%	5%	5%	Go shopping for pleasure	11%	5%	6%	9%
	Picnics or BBQs	0%	7%	3%	2%	Picnics or BBQs	7%	7%	7%	8%
	Visit museums or art galleries	2%	0%	1%	6%	Visit museums or art galleries	4%	3%	8%	8%

Daytrip Visitors					Overnight Visitors				
Indicator	BULOKE	HINDMARSH	WEST WIMMERA	YARRIA-MBIACK	Indicator	BULOKE	HINDMARSH	WEST WIMMERA	YARRIA-MBIACK
Bushwalking / rainforest walks	4%	3%	6%	1%	Play other sports	4%	6%	7%	0%
Visit botanical or other public gardens	0%	4%	5%	3%	Attend festivals / fairs or cultural events	6%	3%	3%	4%
					Visit botanical or other public gardens	3%	3%	0%	7%
					Visit farms	4%	2%	1%	5%
					Visit history / heritage buildings, sites or monuments	4%	2%	1%	5%
					Exercise, gym or swimming	5%	1%	1%	4%
					Attend an organised sporting event	5%	4%	2%	0%
					Other outdoor activities nfd	1%	4%	7%	2%
					Fishing	3%	1%	6%	2%
					Go on a daytrip to another place	2%	2%	1%	5%
					Cycling	1%	1%	5%	3%

Significantly higher Significantly lower

Source: TRA NVS & IVS 2008-2017 average (YE December)

4.7. ECONOMIC PROFILE

The following provides a breakdown of the economic profile of the Wimmera Mallee Sub-Region.

Overall the tourism industry accounts for an estimated 324 jobs across the Wimmera Mallee, or 4% of total industry jobs.

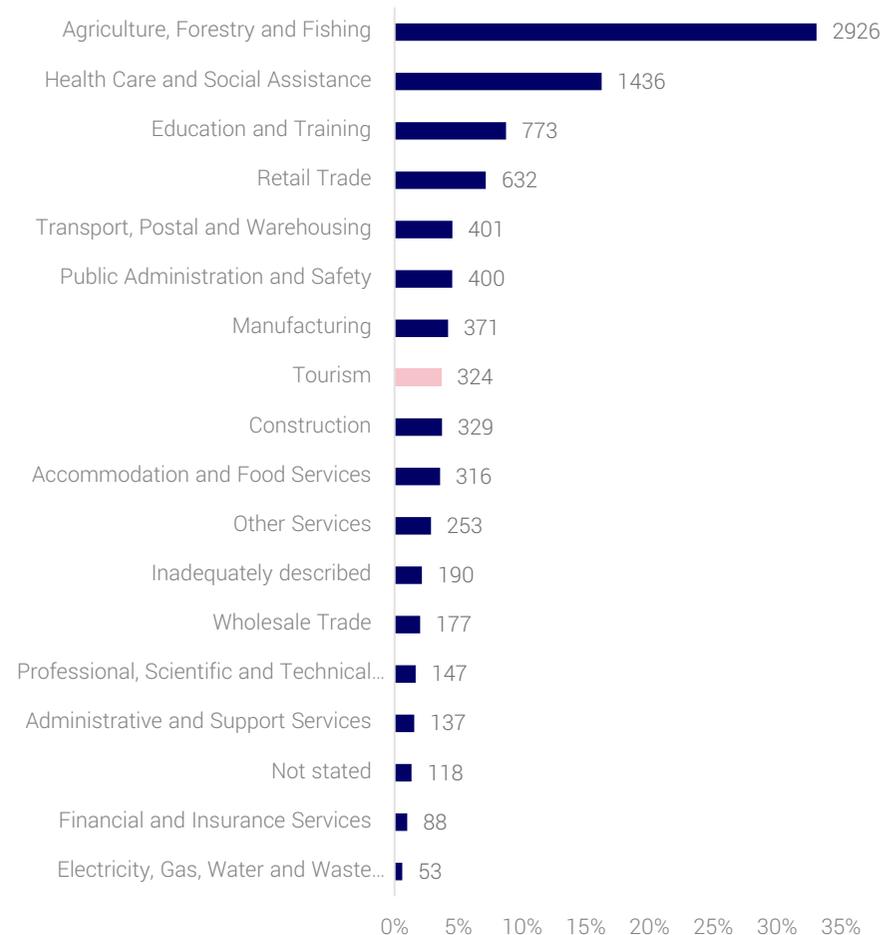
As with the Grampians, Agriculture, Forestry and Fishing, and Health Care and Social Assistance were the largest industry sectors across the region, however for Wimmera Mallee Agriculture, Forestry and Fishing was the largest.

The impact of tourism across Wimmera Mallee LGAs was significantly less than for LGAs across the Grampians. As with the Grampians, two Shires had a similar industry impact attributable to tourism (Hindmarsh and Buloke) whilst the impact of the tourism industry was significantly less for West Wimmera, where the tourism industry is less developed, as previously indicated by low visitation and the level of available products and experiences across the Shire.

4.7.1. KEY INDUSTRY SECTORS

Figure 37 shows that Agriculture, Forestry and Fishing comprises the largest share of employment across the Wimmera Mallee, with 33% of jobs (2926) in this sector, followed by 16% in Health Care and Social Assistance (1436), 9% in Education and Training (773) and 7% in Retail Trade (632). Overall the tourism industry accounts for an estimated 324 jobs across the Wimmera Mallee, or 4% of total industry jobs.

FIGURE 37 INDUSTRY SECTORS BY NUMBERS OF JOBS AND %



Source: ABS TableBuilder, Industry Sector by Place of Work, 2016 Census data; ABS Tourism Satellite Accounts 2016-17

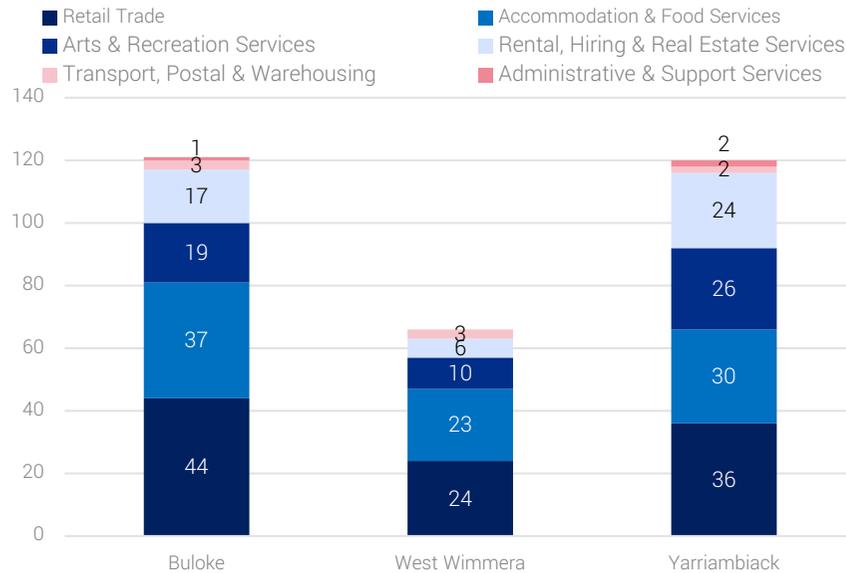
4.7.2. TOURISM BUSINESS AUDIT

Within Buloke, Yarriambiack and West Wimmera Shires⁸ a total of approximately 307 tourism related businesses were identified. This comprised 121 tourism related businesses in Buloke, 120 in Yarriambiack and 66 in West Wimmera.

INDUSTRY SECTOR

Of businesses within the three Shires, the largest proportion were Retail Trade (34% or 104 businesses). Figure 38 shows the number of businesses by type for each LGA.

FIGURE 38 NUMBER OF BUSINESSES BY TYPE BY LGA



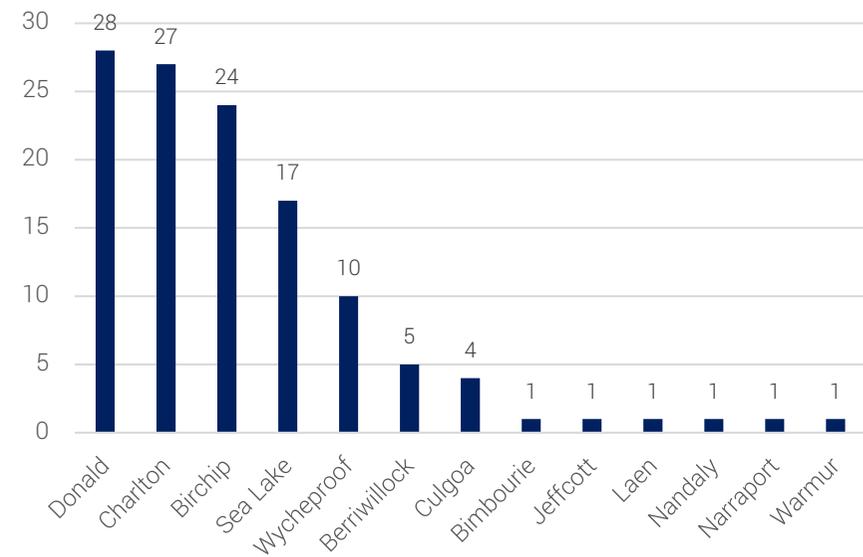
Source: Remplan ABR Data. February 2018

⁸ Business data for Hindmarsh Shire was not made available for use as part of this project.

LOCATION

Within Buloke Shire the largest number of businesses were located in Donald (28), Charlton (27) and Birchip (24), which together comprised 65% of all tourism related businesses in the Shire (Figure 39).

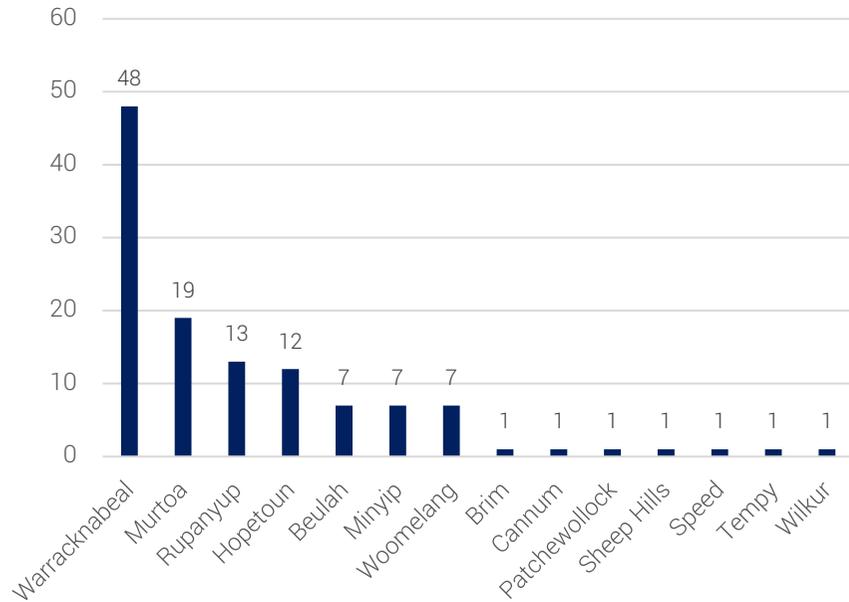
FIGURE 39 BULOKE TOURISM RELATED BUSINESSES BY LOCATION (#)



Source: Remplan ABR Data, February 2018

Within Yarriambiack Shire, Warracknabeal had the largest share of businesses, with 40%, or 48 businesses located in the township, followed by Murtoa (19 businesses), Rupanyup (13 businesses) and Hopetoun (12 businesses) (Figure 40).

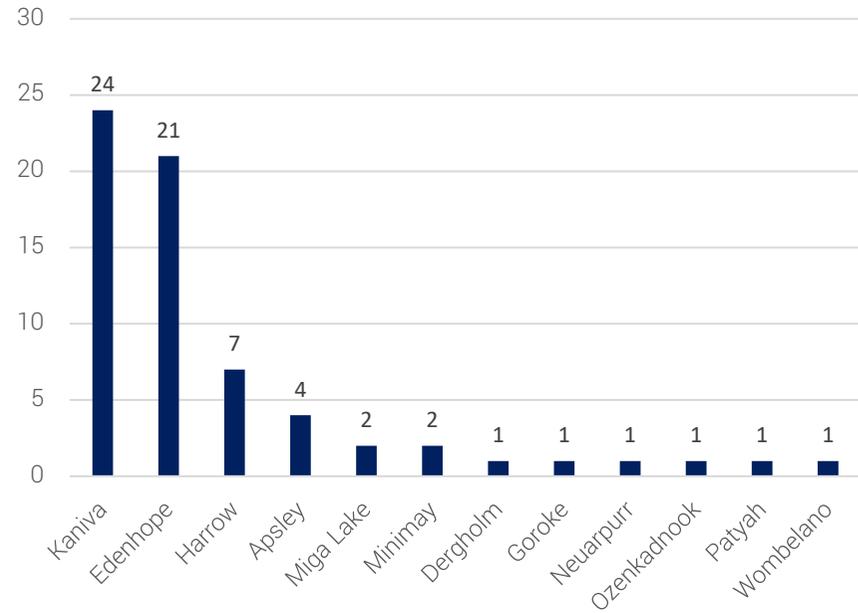
FIGURE 40 YARRIAMBIACK TOURISM RELATED BUSINESSES BY LOCATION (#)



Source: Remplan ABR Data, February 2018

Kaniva (24 businesses) and Edenhope (21 businesses) were the clear service and tourism hubs of West Wimmera Shire, together comprising 68% of all tourism business in the shire (Figure 41).

FIGURE 41 WEST WIMMERA TOURISM RELATED BUSINESSES BY LOCATION (#)



Source: Remplan ABR Data, February 2018

4.8. COMMUNITY PROFILE

In 2016 there were 22,499 people residing in the Wimmera region, down by approximately 1000 people from the recorded 2011 population. Yarriambiack was home to the greatest proportion of residents, with approximately 30% (6,674 people) of the total population of the Wimmera region living in the Shire. 28% of the Wimmera residents lived in Buloke, 25% resided in Hindmarsh and approximately 17% lived in the West Wimmera. The median age of residents ranged from 48 in West Wimmera to 51 in Buloke Shire.

The median weekly household income in the Wimmera region varied across each Local Government Area, ranging from \$839 dollars in Buloke to \$987 in West Wimmera, a range lower than the Victorian average of \$1419.

There were 9,975 private dwellings recorded in West Wimmera, including 3,550 in Yarriambiack (36%), 3,191 in Buloke (32%), 3,026 in Hindmarsh (30%) and 2,224 in West Wimmera (22%).

Table 23 provides key statistics by key local government areas identified in the Wimmera region.

TABLE 23 KEY STATISTICS BY LGA

LGA	POPULATION		MEDIAN AGE (2016)	MEDIAN WEEKLY HOUSEHOLD INCOME (2016)	PRIVATE DWELLINGS (2016)
	2011	2016			
Buloke	6,384	6,201	51	\$839	3,191
Hindmarsh	5,798	5,721	50	\$907	3,026
West Wimmera	4,251	3,903	48	\$987	2,224
Yarriambiack	7,088	6,674	50	\$885	3,550

TOWNSHIPS

The historical population trend for key townships in the region (Table 24) shows that Kaniva experienced the largest decline over the five year period, with a decrease of 137 people or 3.9% average annual decline, followed by Nhill which had decreases of 123 people or 1.4% annually over the period. Of the major townships, only Dimboola did not record a decline in residents over the period, gaining 34 residents.

TABLE 24 POPULATION OF KEY TOWNSHIPS

TOWNSHIP	LGA	POPULATION		CHANGE 2011 TO 2016	AAGR%
		2011	2016		
Dimboola	Hindmarsh	1390	1424	34	0.5%
Edenhope	West Wimmera	716	691	-25	-0.7%
Kaniva	West Wimmera	763	626	-137	-3.9%
Nhill	Hindmarsh	1872	1749	-123	-1.4%
Sea Lake	Buloke	615	574	-41	-1.4%
Warracknabeal	Yarriambiack	2340	2316	-24	-0.2%
Hopetoun	Yarriambiack	555	541	-14	-0.5%
Charlton	Buloke	968	961	-7	-0.1%
Wycheproof	Buloke	628	588	-40	-1.3%
Birchip	Buloke	662	686	24	0.7%
Murtoa	Yarriambiack	809	750	-59	-1.5%
Donald	Buloke	1355	1395	40	0.6%

All four Wimmera Mallee LGAs experienced population decline between 2011 and 2016, with median age of residents higher, and income lower, than for the Grampians.

4.9. VISITOR SERVICING

This section provides a brief overview of current visitor services within the Wimmera Mallee region, including visitor information centres, digital presence and existing branding and marketing.

The Wimmera Mallee region does not currently have an accredited VIC with visitor services provided across the region in a variety of other formats, of varying quality and consistency of information.

It is suggested that the current level of visitation would not support the establishment of an accredited or 'Hub VIC' under the new accreditation guidelines.

With the introduction of new visitor servicing guidelines and a statewide visitor servicing strategy currently being undertaken, establishment of a new visitor services hierarchy within the region is required, with discussion currently underway regarding the consideration of Horsham as an Inspiration Hub that Wimmera Mallee region visitor information centres and services would sit under as 'Satellite' or 'Ancillary' centres.

A focus on digital information and utilising existing businesses to disperse visitor information is a strategy that should be pursued in the short term.

4.9.1. VISITOR INFORMATION CENTRES

This section provides a review and assessment of the current visitor information centre services provided across the Wimmera Mallee region.

ACCREDITED VIC NETWORK

There are currently no accredited Visitor Information Centres within the Wimmera Mallee region, however the four LGA's provide the following non-accredited and/or co-located VIC resources:

- Buloke – 3 co-located VICs (Birchip Business and Learning Centre, Donald Learning Centre, and Wycheproof Community Resource Centre) and 1 privately operated VIC (located in Best Street, Sea Lake);

- Hindmarsh – 1 unaccredited VIC (Hindmarsh Visitor Information Centre – Nhill; and Dimboola) and 2 co-located VICs (Rainbow Café and Wimmera Mallee Pioneer Museum);
- West Wimmera – 2 unaccredited VIC (Edenhope and Kaniva); and
- Yarriambiack – 1 unaccredited VIC (Warracknabeal);

4.9.2. VISITOR INFORMATION SERVICES DEMAND

The Mornington Peninsula Visitor Journey Report prepared by Urban Enterprise in 2014 identified that approximately 62% of visitors preferred to access information on their smart phone or tablets, whilst only 14% preferred to access information at a VIC. A smaller research project conducted in 2016 for Wodonga specifically identified approximately 60% of visitors preferred to access information on their smart phone or tablets, whilst 20% preferred to access information at a VIC. Only 27% of visitors surveyed in Wodonga identified that they had used a source of information during their trip.

An average of these results has been used to calculate the potential visitor demand across the LGAs of the Wimmera Mallee region for physical VICs, digital information and published collateral (Table 25). This demand modelling also utilised information from TRA's IVS and NVS; Urban Enterprise's 2014 Mornington Peninsula Visitor Journey Report; Urban Enterprise's 2016 Wodonga Visitor Information Centre Service Review; and information collected from Grampians Tourism.

Based on previous accreditation guidelines, sustainable VICs were identified as those which can attract more than 35,000 visitors. This reduces the cost per visitor substantially, due to the high cost to operate VICs within the accreditation guidelines.

Table 25 shows that estimated demand for a physical VIC is low across all LGAs within the region, with Hindmarsh the only LGA to have an estimated demand in excess of 35,000.

TABLE 25 POTENTIAL DEMAND BASED ON PREFERRED INFORMATION SOURCE

SUBREGION	VIC	DIGITAL	PUBLISHED COLLATERAL
Buloke	9,579	34,371	7,043
Hindmarsh	37,716	10,511	7,729
West Wimmera	4,215	15,125	3,099
Yarriambiack	10,756	38,595	7,909

Source: Urban Enterprise, 2018

Based on this theoretical demand analysis, at an LGA level only Hindmarsh Shire could potentially support a VIC, however as the primary purpose of visit for domestic visitors is Visiting Friends and Relatives, this would not be recommended. At a regional level, approximately 1.8 accredited VICs could be supported.

2.7.3 DIGITAL MARKETING AND PRESENCE

A review of digital marketing and presence, including social media engagement, was conducted for key organisations involved in tourism promotion across the Wimmera Mallee.

The review found that while Councils and other tourism organisations across the region had an active digital presence, this was restricted primarily to the Facebook platform, with variable quality and frequency of content.

Whilst Wimmera Mallee Tourism and all LGAs had Council and tourism related Facebook pages (as well as Hindmarsh Tourism and Yarriambiack Tourism); only Wimmera Mallee Tourism, Hindmarsh Shire, and Buloke Shire had dedicated tourism websites, and none of these organisations were active across any other platforms such as Instagram, YouTube or Twitter.

The Silo Art Trail Facebook page and to a lesser degree Instagram accounts currently have a much higher degree of engagement than the Wimmera Mallee Tourism social media channels, demonstrating that the Silo Art Trail currently has a greater brand awareness and cut through than the Wild West outback branding used by Wimmera Mallee Tourism to position the region.

Branding and marketing for the region, as well as content development, should explore new brand positioning options which resonate well with target markets. There is also a need to more holistically consider the regions emerging assets such as the Silo Art Trail and Lake Tyrrell which were strongly identified as products and experiences which would motivate visitation to the region (refer to Section 6.6 for further information).

New branding should also align with other regional brand strategies which appeal to contemporary visitors, such as Grampians Way and Cycle West.

4.10. MARKET RESEARCH

Market research conducted for the Wimmera Mallee elicited a total of 215 responses, 85 or 40% of which indicated they had previously visited the region.

4.10.1. VISITOR PROFILE

There was a slightly higher proportion of females (55%) who had visited the region than males (44% with a further 1% not stated), with the largest single age group those aged 30-44 (45%), followed by those aged 15-29 (19%) and 60-74 (18%).

71% of those who had visited were born in Australia, with 82% located in Victoria and 16% from South Australia (1% not stated). The majority had no children in their household (65%).

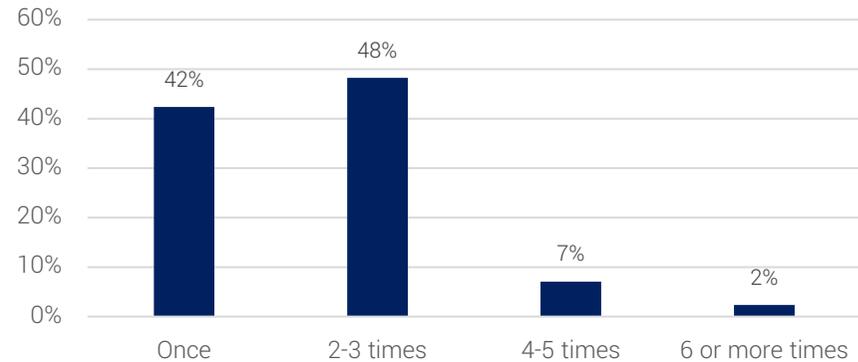
4.10.2. VISITING THE REGION

PAST VISITATION

Of those who had visited the Wimmera Mallee region, 35% indicated they had visited for a short break (2-3 days), followed by those who had visited for a daytrip (23%) or long break (3+ days) (10%).

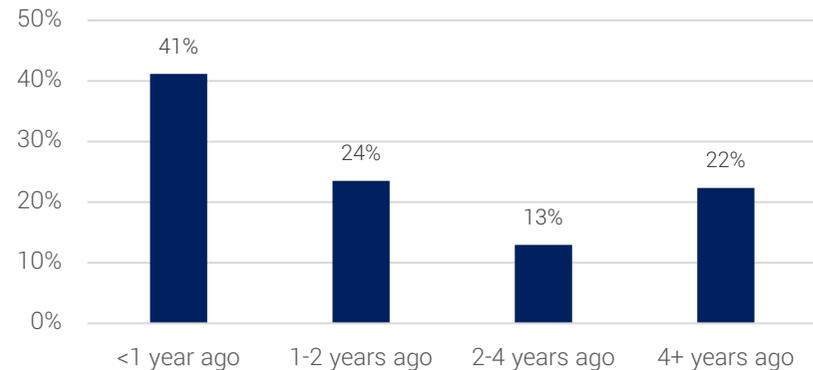
Of those who had visited, 48% had visited the region 2-3 times, followed by 42% who had visited only once (Figure 42).

FIGURE 42 NUMBER OF TIMES VISITED BY %



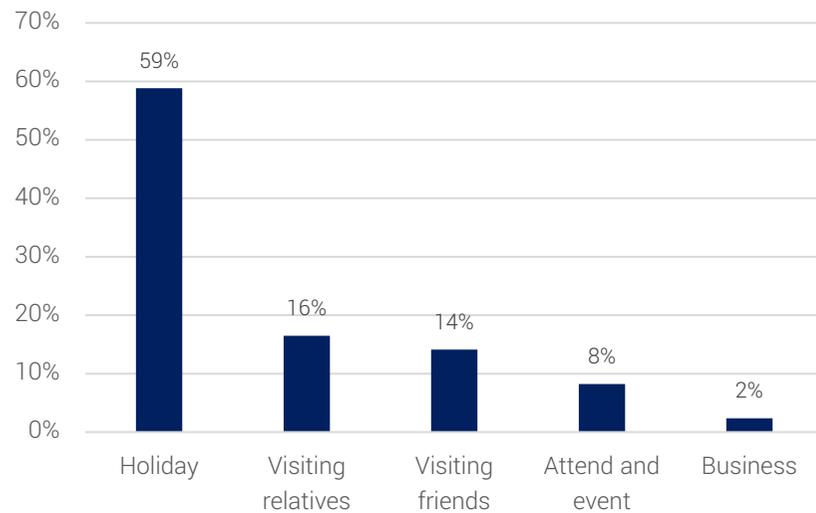
In contrast with the Grampians region, just under half of those who had visited the Wimmera Mallee had done so within the last year (41%), followed by those who had visited between 1- 2 years ago (24%), (Figure 43).

FIGURE 43 TIME OF LAST VISIT BY %



Visiting for a holiday was the most popular purpose of visit, with just over half (59%) indicating that this was the reason for their last visit to the region (Figure 44). VFR was also a key visit motivator for the region, with 30% of visitors visiting friends or relatives.

FIGURE 44 PURPOSE OF LAST VISIT



Visitors to the region identified visiting a range of townships, natural assets and (to a lesser extent) attractions during their most recent visit.

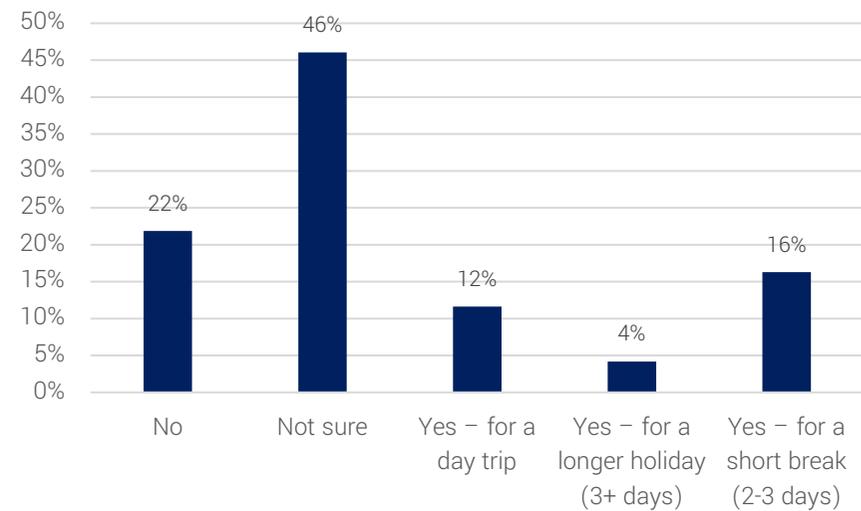
Key natural assets mentioned included National parks (including Little Desert and Wyperfeld) and lakes (including Pink lake, and Lake Albacutya).

Popular townships mentioned included Donald, Dimboola, Warracknabeal, Nhill and Sea Lake. Silo Art was the key attraction mentioned.

FUTURE VISITATION

Of all respondents, 32% indicated they intended to visit the Wimmera Mallee region over the next 12 months, while 22% did not plan to visit and a further 46% were unsure if they would visit or not (Figure 45).

FIGURE 45 INTENTION TO VISIT THE WIMMERA MALLEE REGION



Of those who did intend to visit, 36% would visit for a daytrip, 51% for a short break (2-3 days) and 13% for a longer holiday (3+ days).

Of those who had not visited the region previously, 28% indicated they had no intention to visit the region in the next 12 months, followed by 58% who were unsure.

Barriers to visiting the region

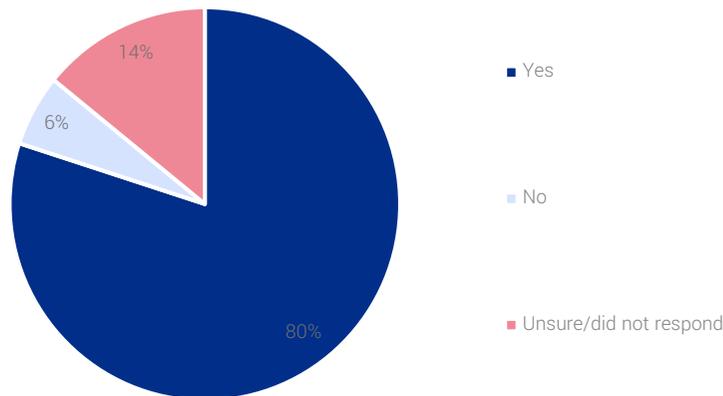
Of the 68% respondents who indicated they would not visit the region or were unsure if they would visit the region in the next 12 months, over half (62%) indicated there were barriers to them visiting, with the top categories:

- A lack of information or knowledge of the region (20%);
- Having other travel plans/other places to visit (10%);
- Lack of desire or interest in visiting (6%);
- Lack of time to visit (5%); and
- Distance (5%).

PERCEPTION OF THE REGION

Of those who had visited the region, 80% indicated they would recommend visiting the region to family or friends (Figure 46).

FIGURE 46 PROPORTION OF VISITORS WHO WOULD RECOMMEND THE REGION TO FAMILY/FRIENDS



Respondents identified a range of key words/attributes that they believed made the Wimmera Mallee unique, with (similar to the Grampians) the most commonly

mentioned the region's beauty and nature, followed by its scenery and people. Figure 47 shows weighted range of key/words/attributes identified.

FIGURE 47 WHAT IS UNIQUE ABOUT THE REGION



As with the Grampians, nature based attractions and activities were again most strongly associated with the Wimmera Mallee including:

- **Attractions** – scenery and natural beauty, national parks, desert, wildlife, countryside, climate, and lakes; and
- **Activities** – Camping, bush walking, hiking, and fishing and other water activities.

Built attractions such as the Silo Art Trail, agriculture and farming, and the small towns and history throughout the region were also identified as associated with the region.

PRODUCT DEVELOPMENT IN THE REGION

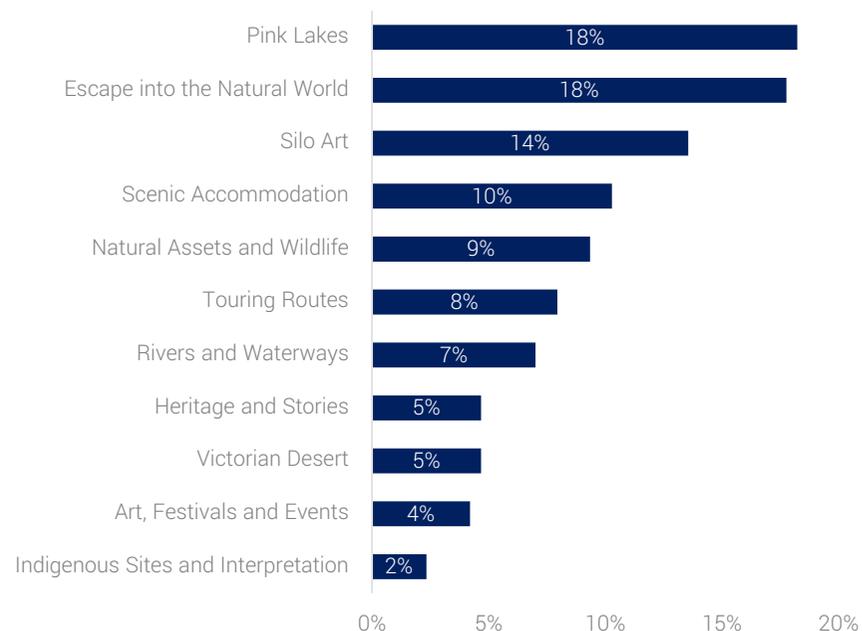
Respondents were asked to identify which of the following products and experiences (if developed) would motivate them to visit the Wimmera Mallee:

- Visit the largest outdoor gallery of Silo Art, with quirky cafes and attractions nearby (**Silo Art**);
- Explore the Victorian desert by foot, bike, motorbike or 4WD (**Victorian Desert**);
- Capture breathtaking images of pink lakes across the region and learn about this unusual natural phenomenon (**Pink Lakes**);
- Cycle, walk or canoe trails along the region's scenic rivers and waterways (**Rivers and Waterways**);
- Escape into the natural world, camping by the water, fishing and disappearing for a few days (**Escape into the Natural World**);
- Stay in scenic visitor accommodation in a natural setting (**Scenic Accommodation**);
- Learn about the region's significant Indigenous history through exploring ancient sites and contemporary interpretation alike (**Indigenous Sites and Interpretation**);
- Visit contemporary arts galleries and attend events such as music festivals, live performances, projections and installations (**Art, Festivals and Events**);
- Learn about the settlement of the region, exploring heritage streetscapes and stories (**Heritage and Stories**);
- Tour routes, linking sites to create a trip that allows you to experience the diversity of the region and its surrounds (**Touring Routes**); and/or
- Exploring and learning about the region's natural assets, including meeting wildlife (**Natural Assets and Wildlife**).

'Capture breathtaking images of pink lakes across the region and learn about this unusual natural phenomenon (**Pink Lakes**)' was identified as the most motivating experience (18% of respondents), followed by 'Escape into the natural world, camping by the water, fishing and disappearing for a few days (**Escape into the Natural World**)'

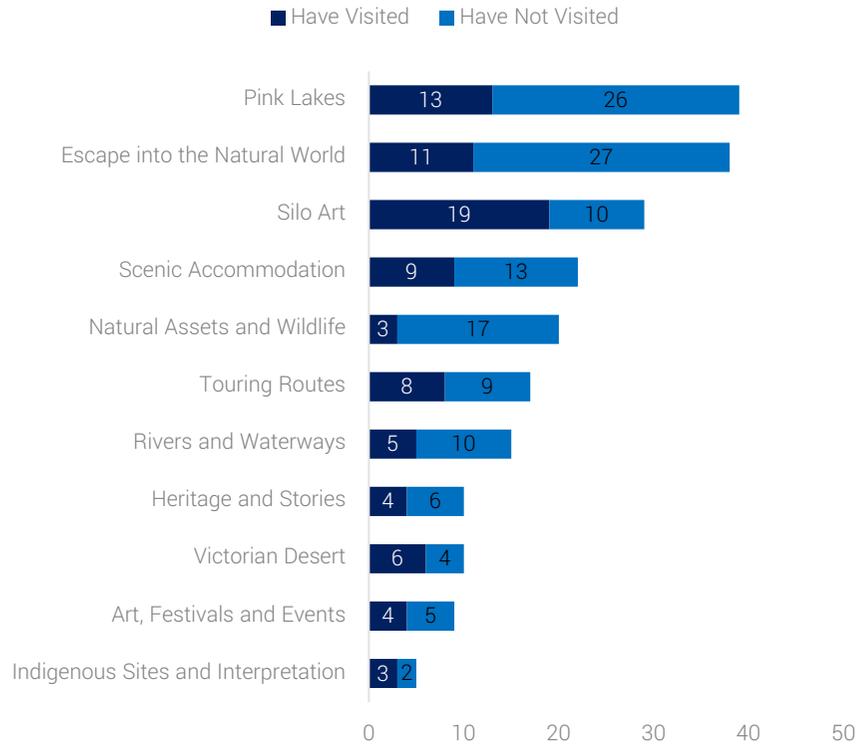
(18%); and 'Visit the largest outdoor gallery of Silo Art, with quirky cafes and attractions nearby (**Silo Art**)' (14%) (Figure 48).

FIGURE 48 PRODUCT/EXPERIENCE THAT WOULD MOST MOTIVATE VISITATION BY %



When comparing responses of those who had previously visited vs those who had not, it was identified that, unlike the Grampians most of the top responses were driven by those who had previously not visited the region; with the exception of 'Visit the largest outdoor gallery of Silo Art, with quirky cafes and attractions nearby (**Silo Art**)', where 19 (or 66%) of the responses were attributable to those who had not previously visited the region (Figure 49).

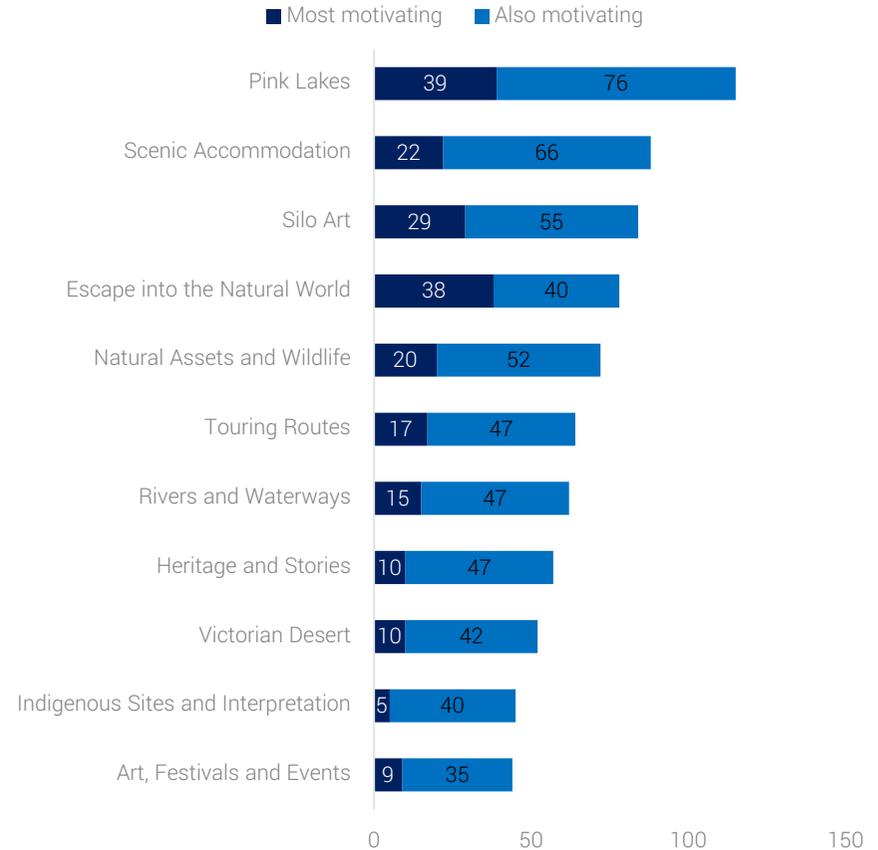
FIGURE 49 PRODUCT/EXPERIENCE THAT WOULD MOST MOTIVATE VISITATION - HAD/HAD NOT VISITED COMPARISON BY NUMBER OF RESPONSES



Respondents were also asked to identify which other products/experiences on the list would also motivate them to visit (multiple responses allowed). Figure 50 provides the number of responses for each product/experience both for those who identified it as the 'most motivating', and for those who identified it as 'also motivating'. 'Capture breathtaking images of pink lakes across the region and learn about this unusual natural phenomenon (**Pink Lakes**)' was overwhelmingly identified as the most motivating product/experience development opportunity, with 43% of

those who didn't identify it as the most motivating identifying it as also motivating (76 respondents).

FIGURE 50 TOTAL MOTIVATION OF PRODUCTS/EXPERIENCES BY NUMBER OF RESPONDENTS



5. GOVERNANCE FRAMEWORK

5.1. INTRODUCTION

The Governance Framework Report, a key component of the Tourism Collaboration Plan, was prepared by Urban Enterprise to analyse the relative strengths and weaknesses of the existing tourism structure in the Wimmera Southern Mallee (WSM) Region (region). This included a review of both Grampians Tourism (GT) and Wimmera Mallee Tourism (WMT)

The purpose of the Report was to develop a governance model that:

Determines the most appropriate, viable and sustainable tourism governance model and structure for the WSM region, to better support the need for industry development, product development and coordinated regional marketing.

The Report outlines the proposed structure to facilitate the delivery of priority projects and drive tourism growth in the region.

5.2. EXISTING GOVERNANCE ARRANGEMENTS

GRAMPIANS TOURISM

Grampians Tourism is the peak tourism industry body for the Grampians, which covers four member Councils (Ararat, Horsham, Northern Grampians and Southern Grampians). It is an official Regional Tourism Board (RTB), based on the Visit Victoria regional model and is supported by its member Councils, which provide a total annual contribution of around \$155,000.

GT operates on an ongoing budget of approximately \$1 million per annum, which primarily includes funding from Local Government, industry and Visit Victoria. This

helps fund four ongoing staff members – CEO, Marketing Manager, Marketing Assistant and an Administration Officer – reporting to the Board.

WIMMERA MALLEE TOURISM

Wimmera Mallee Tourism is the peak tourism body for the Wimmera Mallee, which covers the Councils of Buloke, Hindmarsh, West Wimmera and Yarriambiack. It was incorporated as an (unofficial) Regional Tourism Organisation (RTO) in 2011 to provide a greater focus on tourism development and marketing needs for the area.

It is supported by member Councils with a total financial contribution of \$24,000 per annum (\$6,000 from each Council) and is governed by a Committee of Management, comprising representatives from each Council. However, there is no full-time dedicated resource working for the organisation.

GOVERNANCE MODEL OPTIONS

A total of six options were initially considered and discussed with the Project Control Group (PCG), with two options (1B and 1C) excluded from the assessment undertaken. The remaining four options were refined and agreed to be included in the assessment process. These are outlined in Table 26 overleaf.

TABLE 26 SUMMARY OF GOVERNANCE MODEL OPTIONS

OPTION	GOVERNANCE MODEL	INCLUDED/ EXCLUDED
1A	WMT employs a dedicated tourism officer	Included
1B	WMT receives tourism support and resources from WDA	Excluded
1C	The sub-regions are restructured to better pool resources	Excluded
2	WMT is established as a standalone RTB	Included
3A	A combined RTB (GT & WMT) for a single unified region	Included
3B	A combined RTB (GT & WMT) for two defined sub-regions	Included

5.3. ASSESSMENT CRITERIA

Urban Enterprise assessed each model's relative strengths and weaknesses against the following benchmarks/criteria:

- Governance structure;
- Resource/budget requirements⁹;
- Level of services provided;
- Operational capabilities and key functions (including marketing, product/industry development, collaboration, etc.); and
- Support levels.

The purpose of the assessment was to identify the option with the greatest potential to become a viable tourism governance model that supports tourism growth.

The high-level key findings of the assessment, as outlined in the Report, are summarised in Table 27. It should be noted that the assessment had a significant

⁹ Please note all funding amounts detailed in this paper are estimates only, based on consultation as well as industry research. These figures are subject to further investigation. While potential funding sources are also identified in the analysis, these are subject to further exploration by Councils, WMT and/or GT. These bodies are also responsible for the development of any funding applications going forward.

focus on the financial sustainability of each option, particularly the ability to generate sufficient funds. This is because, in most cases, the ability of the tourism organisation to perform all functions effectively (i.e. marketing, administration, advocacy) is heavily dependent on the level of funding it receives and the resources at its disposal (e.g. staff).

TABLE 27 ASSESSMENT OF GOVERNANCE MODEL OPTIONS

OPTION	HIGH-LEVEL ASSESSMENT	CONCLUSION
1A	<ul style="list-style-type: none"> • Cost-effective (requires a small budget relative to all other options) • Easier access to funding sources due to relatively low budget • Efficient governance structure (formalised via an MoU) • Likely to attract regional and political support 	Financially sustainable/viable
2	<ul style="list-style-type: none"> • Significant resources required for WMT (over and above current contributions by Council) • Unlikely to receive political support 	Not financially sustainable/viable
3A	<ul style="list-style-type: none"> • Significant resources required (over and above current contributions by WMT Councils) • Less efficient governance structure • Unlikely to receive regional or political support 	Not financially sustainable/viable
3B	<ul style="list-style-type: none"> • Significant resources required (over and above current contributions by WMT Councils) • Less efficient governance structure • Unlikely to receive regional or political support 	Not financially sustainable/viable

5.4. RECOMMENDATIONS

Based on the assessment of each model, including a review of strengths and weaknesses, Urban Enterprise recommended **Option 1A (WMT employs a dedicated tourism officer)** for consideration.

In addition, it was recommended that the Committee work towards amendments to the existing Wimmera Mallee Tourism rules of incorporation to consider the appointment of an experienced tourism operator as an independent chair on the committee of management and to have committee positions made available for strategic partners such as Parks Victoria and the Wimmera CMA. An independent Chair would bring the WMT structure into alignment with other Victorian tourism bodies (Boards) that have the support of Visit Victoria.'

Overall, Option 1A was determined to be the most viable and appropriate tourism governance model which could support tourism growth. Importantly, it was identified to have the highest realistic chance of generating sufficient funds and support, which would enable the effective delivery of key services such as industry development, product development and coordinated regional marketing.

In particular, the option was determined to help WMT achieve the following key outcomes:

- Formal recognition from GT and Visit Victoria (via an agreed MoU);
- Additional resources to fund a tourism officer; and
- Access to grants for WMT projects/initiatives.

Although the model ensures WMT remains an RTO in the short-term, it was considered that the growth of WMT (in terms of funding and recognition) is a longer-term strategy. As the tourism industry in the Wimmera Mallee grows, with the help of a dedicated tourism officer, this should lead to greater resourcing and support in the medium to long-term (from both Local Government and industry). Therefore, with a stronger base of support and funding, WMT would be able to operate more effectively and have more influence over the sub-region.

As such, generating official recognition for WMT should be viewed as a longer-term goal, with the immediate objective to develop and mature the visitor economy (including the local industry that supports it).

In addition, the benefit to GT would be more opportunities for collaboration with WMT, as well as flow-on benefits from general growth in the visitor economy (e.g. increased visitation, visitor spend, etc.).

ACTIONS

Following the PCG meeting on 5 September 2018, it was agreed by all parties to endorse Option 1A as the recommended approach.

Visit Victoria supports Grampians Tourism as the recognised Regional Tourism Board and has committed time and expertise in assisting Wimmera Mallee Tourism further develop their tourism product through the DMP process in the spirit of collaboration.

A Memorandum of Understanding is recommended to assist make Visit Victoria funding applications (Regional Events fund & Regional Events & Innovation Fund) easier for WMT through the establishment of an agreed three-way MOU.

A long-exposure photograph of a starry night sky with a single tree in a field. The sky is filled with numerous bright, colorful streaks of light, likely from stars or galaxies, creating a sense of motion and depth. The ground is a flat, open field with a single, dark tree standing in the center. The overall mood is serene and contemplative.

PART B

STRATEGIC DEVELOPMENT FRAMEWORK

6. WSM STRATEGIC CONSIDERATIONS & DIRECTIONS

6.1. INTRODUCTION

The following section provides an overview of the key strategic considerations and directions for the WSM region, incorporating issues and opportunities identified at a regional, sub-regional and local level throughout the research and consultation process.



Source: Jonatha Jünge, 2015

6.2. SWOT ANALYSIS

Table 28 overleaf provides a summary of the key identified strengths, weaknesses, opportunities and threats for the WSM region, as identified through background research and consultation.

TABLE 28 IDENTIFIED STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS FOR THE WSM TOURISM INDUSTRY

STRENGTHS	
<ul style="list-style-type: none"> • Very high quality natural landscapes, including assets of national and state significance (e.g. Grampians, Little and Big Deserts and Mount Arapiles), and a range of other national/state forests; • High sports and recreation participation in the region; including rock climbing, and cycling as emerging strengths; • Grampians wine region; • Mountainous vistas and natural beauty; • Clean, fresh environment which lends itself to wellness industry developments and marketing; and • Unique Victorian outback/desert • Grampians Peaks Trail 	<ul style="list-style-type: none"> • Significant Indigenous history and culture across the region; • Diverse waterway assets which provide conditions for a range of recreational uses; • Low level of light pollution; • Existing Industry assets – such as GrainCorp silos; • Distinct and diverse Australian and local fauna including those unique to the region including native wildflowers and orchids; • Diverse range of local produce (wine, grains); • A range of history and heritage assets across the region
WEAKNESSES	
<ul style="list-style-type: none"> • Expansive region with low transit visitation in some areas; • Low market awareness of region and product offer; • Leveraging visitor spend from recent and ongoing product investment (Silo Art Trail); • Shortage of engaging Nature Based Tourism product or signature experiences in each sub-region; • Waterway access and infrastructure gaps across nature based assets; • Lack of complimentary product (e.g. eco-accommodation) for nature based assets; • Investment and maintenance resourcing; • Low awareness and promotion of key assets, relative to each sub-region; and • Visitor readiness of new and developing assets. • Low awareness and/or interpretation of existing Indigenous assets; • Capacity and resourcing of local Indigenous groups to deliver identified product opportunities; 	<ul style="list-style-type: none"> • Although the natural landscape is a distinctive and unique asset at the state level, awareness of the region and its assets are a key weakness, particularly across the Wimmera Mallee; • Current outside awareness of Indigenous history and connection to it is limited; • Distance from Melbourne as a key visitor market, particularly for the Wimmera Mallee; • Accommodation stock is dated and off trend, of varying quality, and not easily accessible (i.e. low digital presence), as well as being limited in quantity; • Food and beverage product quantity and quality is lacking, including being very limited in the Wimmera Mallee; • Regional promotion and awareness; • A large proportion of visitors are from lower yield markets (e.g. family visitors) attracted to free recreational activities and accommodation within the region;

<ul style="list-style-type: none"> • Lack of / or condition of supporting infrastructure at key recreational assets; • Limited development of ancillary products and attractions to support visitation to the natural assets of the region; • Product development related to the existing heritage and historical assets in the region is limited; • Existing dark tourism product is underutilised, with key assets such as Aradale and J-Ward experiencing management and operational constraints; • Low awareness of key regional arts assets; and • Lack of contemporary interpretation of existing heritage assets. 	<ul style="list-style-type: none"> • Lack of / or effectiveness of signage and wayfinding throughout the region; • Lack of quality restaurants and cellar door experiences in the Grampians; • Limited business trading hours (particularly an issue on weekends and public holidays) in the Wimmera Mallee; • Limited development of ancillary products and attractions to support visitation to the natural assets of the region - as a whole region and at a sub-regional level; • Digital presence, particularly within the Wimmera Mallee; • Public transport; • Limited funding and resourcing for WMT
<p>OPPORTUNITIES</p>	
<ul style="list-style-type: none"> • Increasing visitor dispersal through well developed, promoted and serviced itineraries and routes; • Leveraging from 'hero' routes through focused product development and visitor servicing investment; • Access to National Parks & unlocking commercial investment; • Leverage from state parks and diverse water-based assets such as rivers and hundreds of conservation reserves (protecting the wetlands and swamps) including activity development and passive recreation/ interpretation; • Focus on 'Hero' Nature assets: Grampians National Park; Mount Arapiles-Toooan State Park, Little Desert National Park, Lake Tyrrell Wildlife Reserve and Wyperfeld National Park; • Establish the region as a premier Indigenous tourism destination; • Promote best practice in Indigenous community collaboration and capacity building; • Create a signature Indigenous experience that has international market appeal; • Create products and experiences that will attract identified regional potential markets – international experience seekers and millennials/young travellers; • Increased development and promotion of the regions touring strengths; 	<ul style="list-style-type: none"> • Packaging and promotion of key assets to increase visitor motivation; • Leveraging from unique dark tourism assets (Ararat) to create an iconic product – such as Port Arthur, Tasmania; • Increased development and promotion of the regions touring strengths (including proximity to key thoroughfare from Melbourne to Adelaide); • Development and promotion of the Grampians Pyrenees wine region, including identifying wineries that can be supported to grow their event offerings and profile; • Regional produce in the area provides opportunity to develop ancillary agri tourism experiences particularly associated with existing wineries in the Grampians, and with grains in the Wimmera Mallee; • The development of existing and new events creates an opportunity to increase liveability in the region; • First adopter leverage of the Silo Art Trail development presents a key opportunity to position the region as the premier Silo Art destination in Australia; • Further development and coordination of the region's food and beverage products will enhance the region as a touring and nature based destination; • The existing diversity of nature based attractions on offer could support further development of adventure, sport and recreation product;

<ul style="list-style-type: none"> • Product development to leverage the potential of underutilised townships such as Rupanyup, St Arnaud and Edenhope; • Federal and state support for the development of authentic aboriginal tourism opportunities; • Facilitating Indigenous participation in the tourism sector; • Accommodation which heroes the natural environment and provides an immersive and unique experience; and • Development of other ancillary product (such as F & B) that will entice low yield visitors (e.g. families staying in free camping) to visit and spend money in the bigger townships (e.g. Nhill) in the Wimmera Mallee particularly 	<ul style="list-style-type: none"> • Development of educational experiences which provide contemporary interpretation of current assets, and food and beverage experiences which leverage from the produce history of the region; • Increased marketing and promotion of the region; particularly the Wimmera Mallee; • Whole of region marketing initiatives (e.g. promotional brochure outlining all towns and activities) to support the Wimmera Mallee Tourism brand; • Transforming the region through big picture thinking and game changing projects – e.g. passenger rail reinstatement, NBN and connectivity;
<p>THREATS</p>	
<ul style="list-style-type: none"> • Increased competition from other destinations within Victoria, Interstate and internationally to attract visitors • Loss of key agricultural assets supporting the region’s economy (community threat) • Changing climate challenges - drying lakes and wetlands and increased blue green algae outbreaks 	<ul style="list-style-type: none"> • Attitude towards tourism in the region is a threat – strong agricultural industry focus; existing visitor assets in the region (e.g. accommodation and food) are geared towards industry ‘visitors’ who already provide the necessary occupancy and revenue without the property/business owners needing to meet holiday visitor expectations • Bushfire prone area causing long term closures and affecting visitor perception of burnt areas.

6.3. STRATEGIC CONSIDERATIONS

Overarching Strategic Considerations for the Tourism Collaboration Plan and the region include:

- **Sub-regional approach** - Product development and marketing requires a localised sub-regional approach
- **Hero products** - There is a need to identify and leverage the 'hero' products and experiences across the region, raising awareness and visitation
- **Capacity building** - There are significant benefits to be attained through resourcing and skills-based collaboration, including industry capacity building
- **Visitor readiness** - There is a need to improve the visitor readiness and servicing of the region
- **Population decline** - There is a key role for tourism to play in addressing economic and population decline across the region, as well as improving community liveability

6.3.1. SUB-REGIONAL APPROACH

There are two clear sub-regions within the WSM, aligned to existing product strengths, development and governance arrangements. A Tourism Collaboration Plan (and any subsequent sub-regional DMP) approach which heroes these two regions as distinctly different yet identifies areas and opportunities for collaboration and resourcing sharing is required to boost the tourism capacity of the region as a whole.

6.3.2. 'HERO' PRODUCTS

LOW AWARENESS AND RECOGNITION

There is currently low market awareness of the region and its product and experience offer, particularly the Wimmera Mallee. This is influenced by an historical lack of promotion and branding, and the geographical distance from key metropolitan source markets such as Melbourne, Sydney and Adelaide.

VISITATION AND DISPERSAL

There is opportunity to capture a larger share of domestic visitation, with the WSM region currently attracting lower domestic visitation than other surrounding Victorian tourism regions.

Visitor dispersal throughout the region is also an issue, with areas of high concentration of visitors such as Halls Gap, struggling to effectively service existing visitation.

UNLOCKING NATURE BASED TOURISM OPPORTUNITIES

There are a range of unique assets across the region, some of which are iconic (Grampians National Park) or well known for a unique offering (Mount Arapiles-Tooan State Park), and others of which are very underutilised (Little Desert National Park, Big Desert Wilderness Area, and Wyperfeld National Park).

Water ways in particular are underutilised, with limited or poor-quality facilities and infrastructure an issue for many key assets across the region.

GEOGRAPHIC CONTEXT

Distance and location are key constraints for the region, particularly within the Wimmera Mallee, including the distance from major markets and smaller region population centres to attract non-holiday visitors such as VFR.

The overall size of the region also creates difficulties, with the diversity of product both an asset and a constraint to creating a strong branding message for the region beyond the iconic Grampians National Park product.

STRATEGIC POSITIONING

Due to the geographic size of the region, it shares boundaries with a number of significant tourism regions with which there is opportunity to create cross regional product (such as touring routes) that will help to strategically position the region and better disperse visitors.

6.3.3. CAPACITY BUILDING

EXISTING TOURISM GOVERNANCE

The existing tourism governance of the region is a key issue that has been affecting tourism development and growth across the region, particularly within the Wimmera Mallee. A new formalized collaborative structure will ensure the entire region is well positioned to capture visitor growth.

COMPETITION AND COLLABORATION

Effective collaboration is a key issue across the region and limits the ability of the region to create product with a national or international visitor pull. A competitive rather than collaborative mindset is present at varying levels of governance across the region, with improved regional tourism governance (including industry skills and capacity development) required to effectively leverage from the existing iconic nature based assets (such as the Grampians), and developing product (such as the Silo Art Trail).

INDIGENOUS COMMUNITY CAPACITY

Although there are significant Indigenous assets across the region, the capacity of the local Indigenous community to action outlined initiatives is currently limited, requiring resourcing and support to enable delivery.

6.3.4. VISITOR READINESS

VISITOR EXPENDITURE CAPTURE

The regions existing primary nature based strengths currently correlate to a low visitor spend across the region, due to a lack of supporting product and services to capture visitor expenditure. This is particularly evident across the Wimmera Mallee.

ACCOMMODATION GAPS

Accommodation was identified as a key issue/product gap across the whole WSM region, in terms of both quantity and quality of existing accommodation stock.

Townships within the Grampians are under-resourced in terms of accommodation capacity and quality of the existing product offer is variable, with much of it unmotivating and not matching current target market expectations.

There is also a distinct lack of accommodation options across the Wimmera Mallee, including anything of scale, however securing private investment is difficult due to the current scale and unpredictability of the tourism industry within the region. All LGAs indicated that self-contained and serviced accommodation options were under supplied in the region.

The quality of camping area infrastructure in national and state parks is also key weakness, with most of it aged and needing significant investment.

CAPTURING TRANSIT VISITATION

There is an opportunity to better position key towns across the region which are located in close proximity to major transit routes to more effectively capture transit visitation, including improving signage and wayfinding, and better provision of key visitor services.

PHYSICAL CONNECTIVITY AND INFRASTRUCTURE

Visitor accessibility is a key issue across the region, with a lack of public transport options across the region, including a limited train network and key service timetabling inefficiencies which makes travel throughout the region difficult without a private vehicle.

Regional airports vary in quality and use, with some receiving significant recent investment but underutilized (such as Hamilton), and some requiring upgrade.

Quality of the existing road network is also an issue, particularly within the Wimmera Mallee.

DIGITAL CONNECTIVITY AND INFRASTRUCTURE

Digital connectivity is also a key issue limiting visitor growth across the region, with phone and internet access an issue that negatively affects visitor perception of safety

and ease of travel through the region, in addition to negatively affecting community liveability.

VISITOR SERVICING

Visitor servicing and related infrastructure such as signage and wayfinding is also an issue, with available visitor services varying in availability and quality across the region.

FOOD AND BEVERAGE AVAILABILITY

The food, wine and agritourism sector is very underdeveloped in the region, given the existing wineries and agricultural production. Leveraging and building on existing Wine Region including branding, promotion and activation and the development of destination dining experiences is a key opportunity for the Grampians.

Within the Wimmera Mallee region, ensuring adequate food and beverage options to service visitors is an issue, with limited availability and/or opening hours present across the majority of the region. Activating small scale business ventures and developing agritourism and farmgate experiences are key opportunities for the region, particularly the opportunity to hero the region's existing Grain industry.

RESOURCING & FUNDING

Available resourcing and funding is a key issue for both sub-regions, and affects the ability of the region to develop product and experiences, and effectively service visitors.

In particular, Infrastructure gaps cause key challenges to growing the tourism industry in the region, as they affect the consumer perception of the region and its role as a visitor destination

6.3.5. ECONOMIC AND POPULATION DECLINE

POPULATION AND ECONOMIC DECLINE

There is significant economic and population decline occurring in many of the townships through the region, particularly within the Wimmera Mallee. Issues include an aging population and a reliance on traditional industries such as agriculture which are highly vulnerable to macro level threats (such as climate change) and are currently in decline. Development and growth of the tourism industry provides significant opportunity to aid in resident attraction and create economic growth across the region.

SPORTS AND RECREATION CAPACITY BUILDING

Leveraging tourism's capacity to help build the profile and range of sporting and recreation infrastructure across the region presents an opportunity to attract visitation as well as to increase community recreation participation and improve liveability outcomes

6.4. PROJECT ASSESSMENT AND DEVELOPMENT

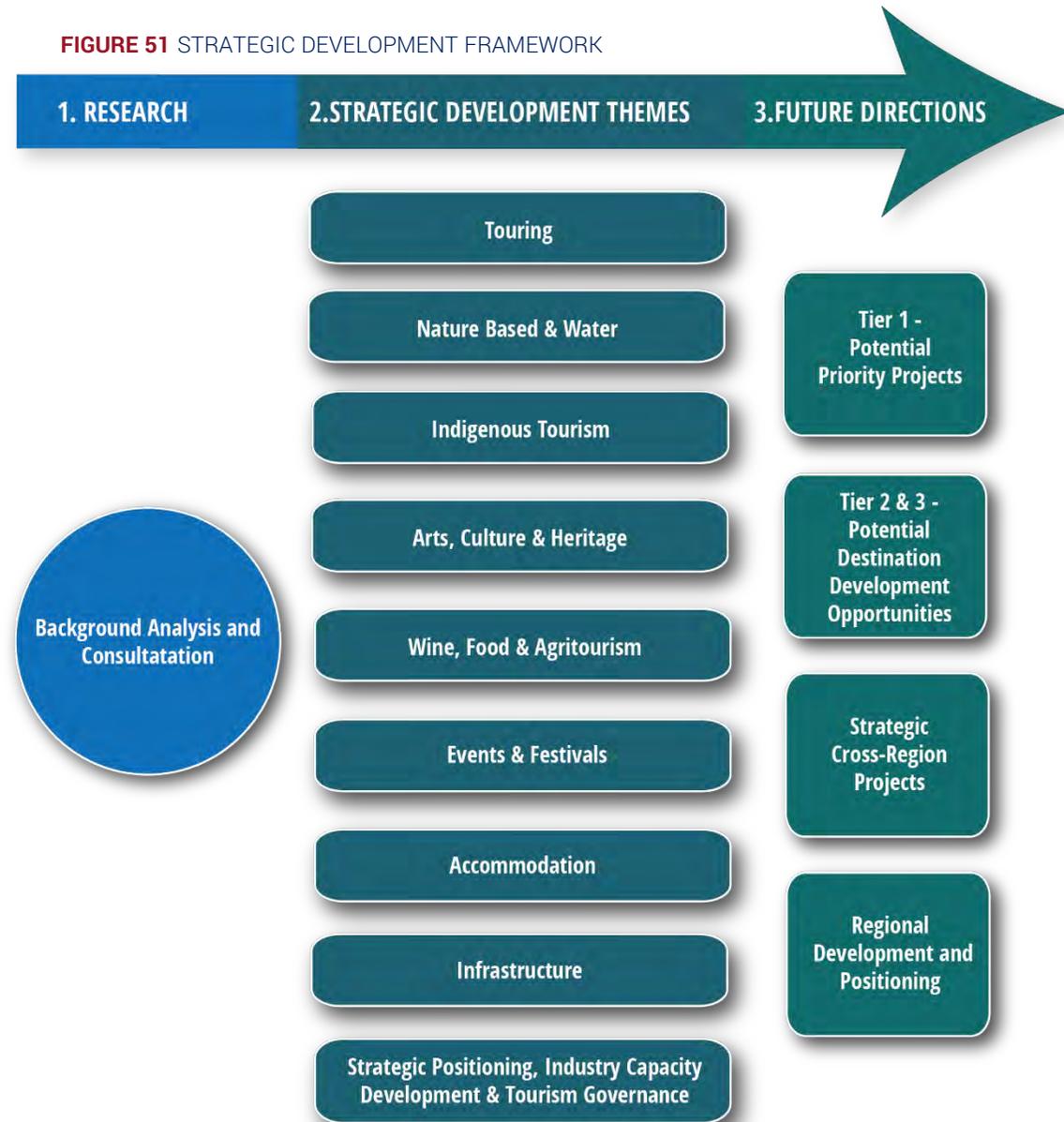
6.4.1. INTRODUCTION

The following section provides an overview of the potential projects and initiatives identified during the background research and consultation phase for the Wimmera Southern Mallee region; including the method utilised to assess the project opportunities identified, including the proposed project assessment criteria.

It includes the guiding strategic development themes, potential priority (Tier 1) and major projects (Tier 2) as well as Tier 3 potential projects identified.

Project opportunities identified for the Wimmera Mallee region (including potential priorities at a WSM region level) have been further developed within the subsequent Wimmera Mallee Destination Management Plan.

FIGURE 51 STRATEGIC DEVELOPMENT FRAMEWORK



6.4.2. ASSESSMENT CRITERIA

Outlined below is an overview of each proposed assessment criteria, based on the identified key strategic considerations for the region:

- **Awareness and Perception** – builds awareness/positively influences perception of the Wimmera Southern Mallee destinations.
- **Target Markets and Branding** – aligns with target market preferences and sub-regional/regional brand aspirations.
- **Visitor Yield** – Captures yield from visitation to existing and future key assets and/or transit visitation.
- **Visitation** – Increases visitation through motivating new visitors, converting daytrip to overnight visitors, and increasing overnight visitor's length of stay.
- **Expands Product Offer** – Creates new experiences which are not available in the region.
- **Community Liveability** – Creates visitor outcomes which also positively impact on the local community's liveability.
- **Industry Capacity and Jobs Growth** – Builds industry capacity including increasing commercial viability of townships and jobs creation.
- **Dispersal** – Increases visitor dispersal throughout the region and/or draws visitors outside of peak periods, helping to create a more sustainable tourism industry for the region.
- **Investment potential** – funding and delivery requirements and alignment with industry funding focus.
- **Sustainability** – Has a high probability of implementation and sustainability over the long term.
- **Accessibility** - Addresses a key infrastructure gap or increases accessibility and ability to service existing and future visitors.
- **Staging** – Current project stage and readiness to be implemented

6.4.3. PROJECT PRIORITISATION

Using the assessment criteria, potential projects have been prioritised and ranked into three tiers. These include:

TIER 1 – REGIONAL IMPACT PROJECT

Large scale investment which will act as a catalyst for significant growth, or unlock a major opportunity.

TIER 2 – SUB-REGIONAL IMPACT PROJECT

Investment that has strong potential and have an impact at the sub-regional level. These projects will:

- Unlock an opportunity that could transform the product in a sub-region;
- Increase levels of visitation, length of stay and yield in a sub-region with a flow on increase in visitation that could impact a number of destinations;
- Improve awareness and perceptions of the sub-region.

TIER 3 - LOCAL IMPACT PROJECT

Projects which are important to a specific destination or locality. These projects will:

- Fill a product gap and add to the critical mass of product in the region;
- May appeal to a smaller, niche market;
- Support tourism product and opportunities in a specific destination;
- Support an increase in visitation, length of stay and yield in a destination;
- Improve awareness of a locality or destination.

6.4.4. PRODUCT DEVELOPMENT THEMES

Outlined below are the nine key strategic development themes that have been identified for the WSM region, which will each include a range of product, infrastructure, experience and strategy based projects and initiatives.

THEME 1: TOURING - *Development of touring product and awareness which will encourage visitors to explore the region and capitalise on the region's expanse and diversity of product, landscape and experiences*

THEME 2: NATURE-BASED & WATER - *Development, enhancement and activation of the regions iconic and diverse nature assets and waterways, including improving awareness and visitor experience to support increased activation and use*

THEME 3: INDIGENOUS TOURISM - *Leverage the strong Indigenous cultural heritage through interpretation and sensitive development led by the Indigenous community*

THEME 4: ARTS, CULTURE & HERITAGE - *Capitalise on the region's unique heritage assets and emerging arts and culture scene*

THEME 5: WINE, FOOD AND AGRITOURISM - *Build on the regions existing food and wine strengths to support visitation and develop signature product in key destinations*

THEME 6: EVENTS AND FESTIVALS - *Develop new and expand existing festivals and events to encourage off season visitation to the region, dispersal through the region, build regional awareness and provide social benefits for the local community*

THEME 7: ACCOMMODATION - *Review of the current accommodation offer and development of contemporary motivating product to better support current visitation and the developing experiences within the region*

THEME 8: INFRASTRUCTURE - *Identify key infrastructure projects required to support and grow tourism development across the region*

THEME 9: STRATEGIC POSITIONING, INDUSTRY CAPACITY DEVELOPMENT & TOURISM GOVERNANCE - *Improve visitor readiness and servicing across the region through industry capacity development, improved tourism governance and identifying linkage and positioning opportunities that will drive tourism development and visitation in the region*



Source: Chris Fithall, 2018

6.5. PROJECT OPPORTUNITIES

6.5.1. POTENTIAL PRIORITY PROJECTS

WSM ACCOMMODATION GAP ANALYSIS AND OPPORTUNITIES STUDY AND ACCOMMODATION INVESTMENT PROCUREMENT

Overview

The Wimmera Southern Mallee Region has limited large scale accommodation and contemporary experiential accommodation. This limits the capacity of the region to grow overnight visitors.

There is a need for a detailed audit and market assessment of current accommodation across the region including occupancy rates, future forecasting, and identification of potential investment sites, focusing on contemporary experiential and mid/high end development.

Key Actions

- Seek funding to support the study
- Appoint a suitable entity to undertake the following:
 - Accommodation audit
 - Market assessment
 - Investment procurement approach
- Development of an accommodation prospectus for potential private investors

MELBOURNE TO ADELAIDE INLAND TOURING ROUTE DEVELOPMENT

Overview

The Western Highway is one of the busiest interstate highways in Australia and traverses a large part of the Wimmera Mallee region.

There is opportunity to slow drivers down on their travels and experience the Wimmera Mallee Region on their way through. Encouraging stopovers on the way

through is one way to increase visitation from a market which is already present in the region.

Wimmera Mallee Tourism should continue the Melbourne to Adelaide touring route development, similar to the program for Sydney Melbourne Touring. Existing and proposed entry points include Walpeup and Ouyen (off the Mallee Highway); Nhill, Charlton and/or Rupanyup (via the Western Highway).

Touring route development would include development of multi-day itineraries and detours aligned to existing and emerging product strengths such as the Silo Art Trail and Food/ Agritourism.

Key Actions

- Seek potential product partners;
- Establish a project control group;
- Undertake a business plan to better leverage from Adelaide to Melbourne touring;
- Implement marketing, product, visitor services and infrastructure initiatives.

WSM INDIGENOUS CAPACITY BUILDING PROGRAM

Overview

Building on the work undertaken within the Wimmera and Grampians Indigenous Tourism Feasibility Study, work with Traditional Owner groups and Indigenous communities across the region to develop a capacity building program to improve relationships between Traditional Owners, explore the significant opportunity for indigenous tourism and identify the mechanisms and support required to action identified indigenous projects across the region.

Key Actions

- Establish a project control group
- Identify Indigenous tourism issues that need to be addressed
- Develop and identify suitable capacity building programs
- Seek funding for delivery of programs



Source: Visit Victoria, 2019

WSM FARM TO PLATE PROGRAM

Overview

There is need to undertake a cross regional Farm to Plate program so that the Wimmera Southern Mallee can be developed as a renowned agri and culinary tourism destination.

The aim of the program will be to improve the quality, authenticity and availability of locally produced food and beverage experiences in the Wimmera Southern Mallee. The program is aimed at businesses throughout the entire supply chain and includes

producers, transport operators, wholesalers and distributors connecting to the food service and independent retail businesses.

Murray Regional Tourism recently undertook a similar program which provides a case study approach.

Program could include the following:

- Farm to plate strategy;
- Regional supply chain program – this will identify ways to connect the region’s food producers and value adders with consumer-facing businesses in the retail, food service, tourism and hospitality sectors.
- Food experience masterclass – for food businesses to learn from the experts - on managing a seasonally based menu, telling the story of provenance and overcoming the difficulties associated with sourcing local produce for commercial businesses.

ACTIONS:

- Establish a project control group
- Seek program funding
- Undertake the Farm to Plate Strategy
- Undertaken pilot programs

6.6. POTENTIAL PROJECTS SUMMARY

PROJECT TITLE	THEME	TIER	PROJECT LEAD	OTHER STAKEHOLDERS	DESCRIPTION	NEXT STEPS
Regional Accommodation Gap Analysis and Opportunities Study and Accommodation Investment Procurement	Accommodation	1	RDV	ARCC; HRCC; NGSC; SGSC; WWSC; HSC; BSC; YSC; Private Sector	Detailed audit and market assessment of current accommodation across the region including occupancy rates and future forecasting, and identification of opportunity sites, focusing on contemporary experiential and mid/high end development.	<ul style="list-style-type: none"> • Seek funding to support the study • Appoint a suitable entity to undertake the following: <ul style="list-style-type: none"> • Accommodation audit • Market assessment • Investment procurement approach • Development of an accommodation prospectus for potential private investors
WSM Farm to Plate Program	Food, Wine & Agritourism	1	WDA/RDV	ARCC; HRCC; NGSC; SGSC; WWSC; HSC; BSC; YSC; Private Sector	<p>There is need to undertake a cross regional Farm to Plate program so that the WSM can be developed as a renowned agri and culinary tourism destination. The aim of the program will be to improve the quality, authenticity and availability of locally produced food and beverage experiences in the WSM. The program is aimed at businesses throughout the entire supply chain and includes producers, transport operators, wholesalers and distributors connecting to the food service and independent retail businesses.</p> <p>Program could include the following:</p> <ul style="list-style-type: none"> • Farm to plate strategy; • Regional supply chain program – this will identify ways to connect the region’s food producers and value adders with consumer-facing businesses in the retail, food service, tourism and hospitality sectors. <p>Food experience masterclass – for food businesses to learn from the experts - on managing a seasonally based menu, telling the story of provenance and overcoming the difficulties associated with sourcing local produce for commercial businesses.</p>	<ul style="list-style-type: none"> • Establish a project control group • Seek program funding • Undertake the Farm to Plate Strategy • Undertaken pilot programs

WSM Indigenous Capacity Building Program	Indigenous Tourism	1	WMT; GT	Traditional Owner groups; RDV; BGLC; WDA; PV	Building on the work undertaken within the Wimmera and Grampians Indigenous Tourism Feasibility Study, work with Traditional Owner groups and Indigenous communities across the region to develop a capacity building program to improve relationships between Traditional Owners, explore the significant opportunity for indigenous tourism and identify the mechanisms and support required to action identified indigenous projects across the region.	<ul style="list-style-type: none"> Establish a project control group Identify Indigenous tourism issues that need to be addressed Develop and identify suitable capacity building programs Seek funding for delivery of programs
Melbourne to Adelaide Inland Touring Route Development	Touring	1	WMT	Local Government	Continue the Melbourne to Adelaide touring route development begun by Wimmera Mallee Tourism, similar to the program for Sydney Melbourne Touring. Existing and proposed entry points include Walpeup and Ouyen (off the Mallee Highway); Nhill, Charlton and/or Rupanyup (via the Western Highway). Touring route development would include development of multi-day itineraries and key detours aligned to existing and emerging product strengths such as the Silo Art Trail and Food/ Agritourism.	<ul style="list-style-type: none"> Seek potential product partners; Establish a project control group; Undertake a business plan to better leverage from Adelaide to Melbourne touring; Implement marketing, product, visitor services and infrastructure initiatives.
Great Southern Touring Route – Murray River Road Link	Touring	1	WMT	GT; Visit Victoria; RDV	Creation, marketing and promotion of a touring route 'link' between the existing Great Southern Touring Route and Murray River Road. This route would begin/end in Stawell (GSTR) and Swan Hill (Murray River Road) and incorporate the existing Silo Art installations in Rupanyup, Sheep Hills, Brim, Rosebery, and Lascelles, as well as Lake Tyrrell.	<ul style="list-style-type: none"> Seek potential project partners Undertake discussions with tour operators Develop a touring itinerary Develop a marketing plan
Digital Infrastructure & Wifi Connectivity	Infrastructure	2	RDV		Improved digital infrastructure across the entire region including mobile phone coverage and elimination of known blackspots, and improved wifi connection provision in main townships across the region.	<ul style="list-style-type: none"> Undertake mapping of blackspots Lobby Government/telcos
Wayfinding & Signage Strategy	Infrastructure	2	RDV	RRV; PV; Local Government	Development of a tourism wayfinding and signage strategy for the whole WSM that will assist in creating a unified approach whilst clearly differentiating the Grampians and Wimmera Mallee Region.	<ul style="list-style-type: none"> Seek funding for delivery of a wayfinding and signage strategy Undertake an audit of signage across the region

						<ul style="list-style-type: none"> • Prepare a plan which priorities signage implementation.
Resident and Business Attraction Program	Strategic Positioning, Industry Capacity Development & Tourism Governance	2	RDV	WDA	Development of resident attraction programs for both the Grampians Region and Wimmera Mallee Region aimed at attracting residents for key skills-gaps and business investment gaps. Seek to attract businesses to the region.	<ul style="list-style-type: none"> • Establish a steering committee for the project • Develop a plan for resident attraction
Melbourne to Mildura Route	Touring	2	WMT		Development of a touring route from Melbourne to Mildura.	<ul style="list-style-type: none"> • Seek potential project partners • Undertake discussions with tour operators • Develop a touring itinerary • Develop a marketing plan

7. GRAMPIANS REGION

7.1. INTRODUCTION

This section identifies potential project opportunities for the Grampians Sub Region. These projects are not identified as priorities for Grampians Regional Tourism but identify potential projects for consideration of a future DMP to be developed for Grampians Regional Tourism.

A vast amount of research and consultation was undertaken to identify these projects and this section provides a useful guide for Grampians Regional Tourism in future planning and strategic work.

7.2. POTENTIAL PRIORITY PROJECTS

GRAMPIANS PEAKS TRAIL COMPLETION & ACTIVATION

Supporting the Grampians Peaks Trail Completion & Activation, including identifying enhancements to support the trail and capture visitor yield. Major projects within this potential priority project include:

Halls Gap Grampians Peaks Trail Departure Experience

Creation of a 'journey of departure' from Halls Gap to the central trailhead of the GPT walk and other Grampians National Park walks, helping to transform Halls Gap into an internationally recognised 'walking town' and delivering a major tourist drawcard within the Village Centre

Grampians Peaks Trail Services

Investment in services to support Grampians Peaks Trail visitors, including guided walks and shuttle services delivered by licensed tour operators.

ARARAT TRAILS MOUNTAIN BIKE PARK

As identified in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan, this priority project involves formalising the existing trails in the Ararat Hills Regional Park to create a network of mountain bike trails. Following formalisation of existing trails including trail head facilities, signage and trail improvement (Stage 1), a subsequent stage is also considered which will expand the trail network to create new cross country and gravity trails.



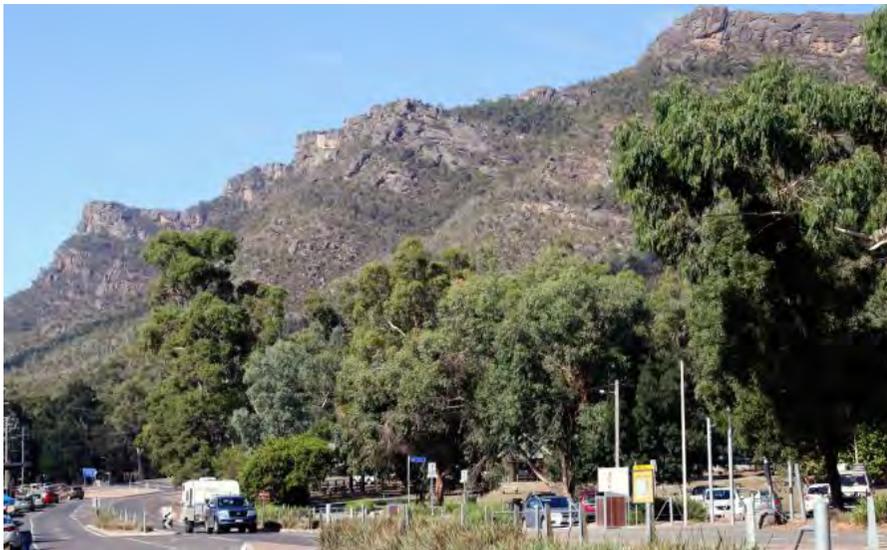
Source: Ararat Rural City Council, 2017

HORSHAM DESTINATION DINING EXPERIENCE

Development of a destination dining experience for Horsham including creating a concept and prospectus to attract potential investors/experienced hospitality providers. Ideally this would be located so as to capture sunset views of the Grampians. Further investigation as to the appropriate location should be investigated in conjunction with existing key stakeholders and land managers.

HALLS GAP VILLAGE CENTRE ACTION PLAN IMPLEMENTATION

Delivery of the Halls Gap Action Plan Stage One which identifies how Council will deliver ideas in the Halls Gap Master Plan for Commercial Investment and Public Land Development (Master Plan) 2016. State government funding of \$1m has been announced which will go towards capital works for the following projects: Stoney Creek boardwalk, Grampians Road Raised Pedestrian Crossing, Southern Gateway Enhancement, School Road Improvements; Health Street Bridge and Road upgrade which will consolidate capital works delivered as part of the Halls Gap Action Plan Stage One.



Source: Visit Grampians, 2019

GRAMPIANS RESORT DEVELOPMENT AND CONFERENCE CENTRE

Development of high end 5 star accommodation and conference centre development in, or in close proximity to, Halls Gap.

REGIONAL FOOD NETWORK AND TASTING TRAIL

Creation of a regional food network and associated tasting trail through the WSM, developed in conjunction with local food producers and food and wine industry bodies.

7.3. POTENTIAL PROJECTS SUMMARY

PROJECT TITLE	LOCATION		THEME	TIER	PROJECT LEAD	STAKEHOLDERS	DESCRIPTION
	LGA	AREA					
Grampians Resort Development and Conference Centre	NGSC	Halls Gap	Accommodation	1	NGSC	Private Sector	Development of high end 5 star accommodation and conference centre development in, or in close proximity to, Halls Gap.
Horsham Destination Dining Experience	HRCC	Horsham	Food, Wine & Agritourism	1	HRCC	Private Sector; Land Managers	Development of a destination dining experience for Horsham including creating a concept and prospectus to attract potential investors/experienced hospitality providers. Ideally this would be located so as to capture sunset views of the Grampians. Further investigation as to the appropriate location should be investigated in conjunction with existing key stakeholders and land managers.
Regional Food Network and Tasting Trail	All	All	Food, Wine & Agritourism	1	GT	WMT	Creation of a regional food network and associated tasting trail through the Grampians, developed in conjunction with local food producers and food and wine industry bodies. Include opportunities to expand the trail to connect to the Wimmera Mallee region as the food and agritourism product offer grows in this region.
Halls Gap Village Centre Action Plan Implementation	NGSC	Halls Gap	Infrastructure	1	NGSC		Delivery of the Halls Gap Action Plan Stage One which identifies how Council will deliver ideas in the Halls Gap Master Plan for Commercial Investment and Public Land Development (Master Plan) 2016. State government funding of \$1m has been announced which will go towards capital works for the following projects: Stoney Creek boardwalk, Grampians Road Raised Pedestrian Crossing, Southern Gateway Enhancement, School Road Improvements; Health Street Bridge and Road upgrade which will consolidate capital works delivered as part of the Halls Gap Action Plan Stage One.
Ararat Trails	ARCC	Ararat Hills Regional Park	Nature based & Water	1	ARCC PV	RDV; GT	As identified in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan, this priority project involves formalising the existing trails in the Ararat Hills Regional Park to create a network of mountain bike trails. Following formalisation of existing trails including trail head

							facilities, signage and trail improvement (Stage 1), a subsequent stage is also considered which will expand the trail network to create new cross country and gravity trails.
Halls Gap Grampians Peaks Trail Departure Experience	NGSC	Halls Gap	Nature based & Water	1	NGSC	Parks Victoria	Creation of a 'journey of departure' from Halls Gap to the central trailhead of the GPT walk and other Grampians National Park walks, helping to transform Halls Gap into an internationally recognised 'walking town' and delivering a major tourist drawcard within the Village Centre.
Grampians Peaks Trail Completion & Activation	All	Grampians National Park	Nature based & Water	1	Parks Victoria		Supporting the Grampians Peaks Trail Completion & Activation, including identifying enhancements to support the trail and capture visitor yield.
Grampians Peaks Trail Services	All	Grampians National Park	Nature based & Water	1	Parks Victoria	Licensed Tour Operators; Private Sector	Investment in services to support Grampians Peaks Trail visitors, including guided walks and shuttle services delivered by licensed tour operators.
Horsham Self Contained Apartment Accommodation Development	HRCC	Horsham	Accommodation	2	HRCC	Private Sector	Investment in a self-contained apartment accommodation product of scale in Horsham.
Aradale Experiential Accommodation Development	ARCC	Ararat	Accommodation	2	ARCC	Eerie Tours; Private Sector	Investigate potential to develop an experiential accommodation development at Aradale working in conjunction with existing operator Eerie Tours.
Aradale Investment Feasibility Study	ARCC	Ararat	Arts, Culture & Heritage	2	ARCC	Aradale Lunatic Asylum	Feasibility study for potential investment at Aradale Lunatic Asylum to activate the site and increase possible tourism uses.
Dark Tourism Packaging and Promotion	ARCC	Ararat	Arts, Culture & Heritage	2	ARCC	Private Sector; Existing Operators	Packaging and promotion of Ararat's dark tourism assets and product including Aradale and J-Ward.
Grampians Arts Triangle/Gallery Trail Enhancement, Promotion and Packaging	ARCC; HRCC; SGSC	Ararat; Hamilton; Horsham	Arts, Culture & Heritage	2	ARCC; HRCC; SGSC	Regional Galleries	Enhancement, promotion and packaging of Ararat (Textiles), Hamilton (ceramics) and Horsham (contemporary photography and Wimmera Artists) Regional Galleries and associated arts precincts incorporating the following sub-projects: <ul style="list-style-type: none"> • Hamilton Art Gallery Enhancement - Enhancement of Hamilton art gallery to make it more interactive - could include development of a masterplan/relocation potential • Hamilton Arts & Cultural Precinct - Development of an arts and cultural precinct to attract visitors and assist in

							<p>revitalisation in Hamilton. Brown Street Arts and Cultural Precinct Concept Plan was completed in 2011 and the Hamilton Arts and Culture Strategic Plan 2013-2017 was completed in early 2014. Review of project status required</p> <ul style="list-style-type: none"> • Horsham Arts Scene Promotion and Activation - Promote and raise awareness of Horsham's arts scene; leverage from this market to draw visitors to the region for events and to the Silo Art Trail • Horsham Arts Scene Promotion and Activation - Stage 2 location and concept development for the Horsham Regional Museum
J-Ward Enhancement & Operational Review	ARCC	Ararat	Arts, Culture & Heritage	2	ARCC	Friends of J-Ward	Enhancement of J-Ward including an operational review.
Natimuk Arts Precinct	HRCC	Natimuk	Arts, Culture & Heritage	2	HRCC		Investigate opportunities to develop a silo precinct in Natimuk as an aerial and animation / projection base which could include training; events; use of the internal silo space as a gallery; and/or café development at the top of silo.
St Arnaud Tourism Enhancement Project	NGSC	St Arnaud	Arts, Culture & Heritage	2	NGSC	Visit Victoria	St Arnaud is a heritage town that has significant opportunity for tourism development, leveraging from its proximity to both the Grampians and Wimmera. There is potential for the town to act as a central and connecting hub between the two regions. This project includes artistic interventions, amenity improvements, heritage enhancement and investment attraction.
Wildlife Art Museum of Australia	NGSC	Halls Gap East	Arts, Culture & Heritage	2	NGSC	Wildlife Art Museum Australia	Actioning the site plans and operation concept prepare for the Wildlife Art Museum Australia which will be a national centre for works of outstanding Australian wildlife and history artists in the Halls Gap East area.
Grampians Pyrenees Culinary Wine Action Plan Implementation	All	All	Food, Wine & Agritourism	2	GT; PSC	Existing Operators; Private Sector	Support the implementation of the Grampians Pyrenees Wine and Culinary Masterplan to support the increased development of the region's food and wine offering, as identified in the Grampians Tourism Strategic Plan 2016-2020.
Grampians Tasting Trail	All	All	Food, Wine & Agritourism	2	GT; PSC	Existing Operators	Create a wine tasting trail through the Grampians Pyrenees region in conjunction with Pyrenees Shire.
Grampians Wine Region Cellar Door Activation	All	Various	Food, Wine & Agritourism	2	GT	Existing Operators; Private Sector	Investigate opportunities to activate current Grampians Winery offers including supporting existing operators to develop cellar

							door experiences, events, complementary dining and/or contemporary and boutique/experiential accommodation.
Paper Scissors Rock Brew Co Microbrewery and Destination Dining Development	NGSC	Halls Gap	Food, Wine & Agritourism	2	NGSC	Paper Scissors Rock Brew Co	Support development of the Paper Scissors Rock Brew Co microbrewery and destination dining development in Halls Gap Hub.
Bunjil's Songlines Tour	All	Various	Indigenous Tourism	2	GT	BGLC; PV	Support BGLC and provide resourcing to the local Indigenous community to establish a Bunjil's Songlines Tour; a 2-3 day tour visiting a number of sites including the Grampians and Bunjil's Shelter, identified as a priority in the Wimmera and Grampians Indigenous Tourism Feasibility Study.
Brambuk The National Park and Cultural Centre Enhancement and Promotion	NGSC	Halls Gap	Indigenous Tourism	2	Parks Victoria	Traditional Owner Groups	Key stakeholders to work with Parks Victoria to enhance, promote and further activate Brambuk Cultural Centre.
Gariwerd Rock Art	All	Grampians National Park	Indigenous Tourism	2	Parks Victoria	Traditional Owner Groups	Enhancement interpretation and promotion of existing Gariwerd/ Grampians Rock Art assets in conjunction with Traditional Owners and land managers where appropriate.
Indigenous Interactive Education Product	All	Various	Indigenous Tourism	2	GT	Traditional Owner groups	Identified as a priority in the Grampians Tourism Destination Plan, this project involves the development of the region's extensive Indigenous heritage targeted at international and educational markets, including Halls Gap (Brambuk), Budj Bim (outside of the region) and Maggolee (Horsham).
Ararat Train Station Redevelopment	ARCC	Ararat	Infrastructure	2	ARCC		Facilitate upgrade of the Ararat Train Station Precinct through delivery of the Ararat Railway Station Precinct Masterplan.
Horsham CBD and River Precinct Masterplan/Wimmera River Corridor Master Plan	HRCC	Horsham	Infrastructure	2	HRCC	Private Sector	Completion of a Masterplan for the Horsham CBD and river precinct and implementation of recommendations, which may include activation of the river precinct through uses such as: <ul style="list-style-type: none"> • Café development on the riverfront; and • Pontoon/floating island in the Wimmera River.
Wimmera Sports Stadium Development	HRCC	Horsham	Infrastructure	2	HRCC		Actioning/funding the Wimmera Sports Stadium Business Case and Concept Design to support the attraction of regional sporting events and increase community participation.
Dunkeld Township Revitalisation	SGSC	Dunkeld	Infrastructure	2	SGSC		Revitalisation of Dunkeld township to support it's role as a trail head for the Grampians Peaks Trail including implementation of community plan findings.
Centenary Park Campground Improvement	HRCC	Mount Arapiles-Toooan State Park	Nature based & Water	2	PV		Improving the visitor offer at the Centenary Park Campground at Mount-Arapiles Tooan State Park 'to provide an outstanding internationally recognised climbing destination supported by

							social, relaxed, and diverse camping experiences and a range of other activities including sightseeing, walking and picnic opportunities’.
Grampians RDV Region Cycling and Trails Infrastructure Business and Masterplan Implementation	All	All	Nature based & Water	2	RDV	ARCC; HRCC; NGSC; SGSC	Support the implementation of the Grampians RDV Region Cycling and Trails Infrastructure Business and Masterplan to support the increased development of the region’s cycling offer, including Tier 2 and Tier 3 projects identified for the Grampians Region.
Regional Digital Project	All	All	Strategic Positioning, Industry Capacity Development & Tourism Governance	2	GT	RDV; WMT	Digital tools to co-ordinate, promote and inform the visitor experience across the Grampians Region and the Wimmera Mallee Region, including collaboration and cross promotion between the two regions.
Grampians Way	All	All	Touring	2	GT	ARCC; HRCC; NGSC; SGSC	Identified as a high priority project in the Grampians Tourism Destination Plan and Investment Roadmap, this project involves development and promotion of the Grampians Way Route through each of the LGAs located in the Grampians Region.
Grampians Tourism Destination Plan and Investment Roadmap Implementation	All	All	Various	2	GT	ARCC; HRCC; NGSC; SGSC	Support the implementation of the Grampians Tourism Destination Plan and Investment Roadmap to support the increased development of the region, including Tier 2 and 3 projects identified.

8. WIMMERA MALLEE REGION

8.1. POTENTIAL PRIORITY PROJECTS

WIMMERA MALLEE TOURING PROJECT

WMT should consider engagement with existing touring companies based in and around the region to develop and implement new tour itineraries for the Wimmera Mallee Region (and surrounds), including trail development for day trips to supplement the Silo Art and Lake Tyrrell Experiences and organised 4WD/Adventure trips.

SILO ART TRAIL STRATEGIC PLAN AND IMPLEMENTATION

Development and implementation of a Strategic Plan for the Silo Art Trail across the Wimmera Mallee Region to guide expansion and activation of the Trail to enhance its position as the largest outdoor gallery, increase visitation and enhance the visitor experience and effectively capture visitor yield. Major projects within this priority include:

Silo Art Stage 2

Building from the funding of Silo Art at Serviceton, Kaniva & Goroke, development of a total of 12 new Silo Artworks throughout the Shires in the Wimmera Mallee Region, enabling routes and linkages to be created between sites and across the four shires.

Existing Silo Trail Activation and Enhancement

Activation of visitor infrastructure and enhancements across the existing Silo Art Trail installations and related townships of Sheep Hills, Brim, Patchewollock, Lascelles, Rupanyup, Rosebery.

Silo Trail Hub & Gateways project

Activation and enhancement of current/stage 2 key Silo Art Trail gateway towns within the Wimmera Mallee Region (e.g. Rupanyup; Dimboola; Edenhope; Charlton; Donald; Kaniva) and hub towns (e.g. Sea Lake; Wycheproof; Hopetoun; Warracknabeal; Goroke; Rainbow).

LAKE TYRRELL AND SEA LAKE TOURISM INVESTMENT MASTERPLAN

Develop a Masterplan for Lake Tyrrell and Sea Lake township to the destination international visitor ready. This would include recommendations on visitor servicing, investment in accommodation and supporting product, and creating linkages between Sea Lake and the Lake Tyrrell site.

WIMMERA RIVER DISCOVERY TRAIL

Identified as a priority project in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan this project involves development of the Wimmera River Discovery Trail (Cycling) stage 1 and 2, incorporating the townships of Jeparit, Dimboola, Natimuk and Horsham.

This will also include an Indigenous interpretation project to complement the trail development.

VISITOR SERVICES REVIEW

Conduct a Visitor Services Review for the Wimmera Mallee Region, with the objective to increase visitor information availability and quality across the region including exploring alternate visitor servicing methods such as touchscreens and business/local ambassador programs, and improvement of existing visitor information services providers (such as Kaniva Windmill Café/VIC; Beulah Business Centre; Gateway BEET and Wonga Park Information Centre).

WIMMERA AND MALLEE PARKS MASTERPLAN

Development of a new Wimmera and Mallee Parks Master Plan that encompasses the Big Desert Wilderness Area, Little Desert National Park, and Wyperfeld National

Park that identifies ongoing management requirements as well as infrastructure and facilities required to support visitation, and identifies private investment opportunities for the three parks, as appropriate.

This plan should be expanded to include non Parks Victoria assets to provide a consistent 'whole of government' approach to nature based tourism facilities and investment in the region.

REGIONAL EVENTS STRATEGY

Events are a key driver of visitation to regional Victoria. There are however very few signature events in the Wimmera Mallee Region that drive large visitor numbers and increase the profile and brand of the region.

With some funding support and a clear procurement strategy, development of events that grow overnight visitation should be a focus for the region.

The development of an events strategy similar to the Murray Region Events Strategy will identify exciting events that can grow and mature further and new events that may be developed which align to the brand strengths of the region.

WIMMERA MALLEE TOURISM INVESTMENT ATTRACTION PLAN

There are many private sector investment opportunities identified in this plan. However Councils have limited resources to promote investment opportunities identified in their areas. A coordinated approach to investment attraction across the region will allow for pooling of resources and development of a targeted strategy, business case for investment and digital media to market opportunities.

WIMMERA MALLEE TOWN AND VILLAGE STREETScape RENEWAL PROJECT

The Wimmera Mallee Region is made up of many heritage towns and villages that provide support local communities and also provide amenity and services for visitors. Local Governments in the region are generally low on resources and there is limited ability for Local Government to fund quality streetscape plans and also fund infrastructure.

CARAVAN PARKS AUDIT, STRATEGIC PLAN AND INVESTMENT STRATEGY

Caravan parks provide one of the key visitor assets in the Wimmera Mallee Region and are critical to attracting visitors and supporting stopovers in the region.

The delivery of improved caravan parks that have high amenity will support growth in visitation to the region.

A caravan park investment strategy across the region will identify investment needed in current parks and potential new locations for new parks to support growth in nature based and arts and cultural tourism.

LITTLE DESERT NATURE LODGE DESTINATION EXPERIENCE

Development of Little Desert Nature Lodge into a nature based tourism destination experience. This could potentially incorporate experiential accommodation, and/or Indigenous tours (identified as a priority in the Wimmera and Grampians Indigenous Tourism Feasibility Study)

WIMMERA MALLEE MARKETING AND BRAND STRATEGY

A marketing and brand strategy should be developed for Wimmera Mallee Tourism by an experienced consultant.

This will include consideration of market research findings within the DMP and provide guidance on the following:

- Further definition of target markets;
- Marketing and digital media strategy;
- Social media strategy; and
- Action plan.

RAINBOW BREWERY DESTINATION DEVELOPMENT

Support current and further development and activation of Rainbow Brewery including exploring the potential for development of an accompanying gastropub dining experience and micro events.

8.2. POTENTIAL PROJECTS SUMMARY

PROJECT TITLE	LOCATION		THEME	TIER	PROJECT LEAD	STAKEHOLDERS	DESCRIPTION
	LGA	AREA					
Caravan Park Audit, Strategic Plan and Investment Strategy	All	All	Accommodation	1	RDV	WDA; BSC; HSC; WWSC; YSC	Undertake a study of the condition of existing caravan parks within the region and their ability to meet contemporary accommodation standards and implement key findings.
Silo Art Trail Strategic Plan and Implementation	All	Various	Arts, Culture & Heritage	1	WMT	Visit Victoria; RDV; BSC; HSC; WWSC; YSC	<p>Development and implementation of a Strategic Plan for the Silo Art Trail across the Wimmera Mallee Region to guide expansion and activation of the Trail to enhance its position as the largest outdoor gallery, increase visitation and enhance the visitor experience and effectively capture visitor yield. Major projects within this priority include:</p> <ul style="list-style-type: none"> • Existing Silo Art Trail Activation and Enhancement - Activation of visitor infrastructure and enhancements across the existing Silo Art Trail installations and related townships of Sheep Hills, Brim, Patchewollock, Lascelles, Rupanyup, Rosebery. • Silo Art Stage 2 - Building from the funding of Silo Art at Serviceton, Kaniva & Goroke, development of a total of 12 new Silo Artworks throughout the Shires in the Wimmera Mallee Region, enabling routes and linkages to be created between sites and across the four shires. • Silo Trail Hub & Gateways project - Activation and enhancement of current/Stage 2 key Silo Art Trail gateway towns within the Wimmera Mallee Region (e.g. Rupanyup; Dimboola; Edenhope; Charlton; Donald; Kaniva) and hub towns (e.g. Sea Lake; Wycheproof; Hopetoun; Warracknabeal; Goroke; Rainbow).
Lake Tyrrell and Sea Lake Tourism Masterplan	BSC	Sea Lake; Lake Tyrrell	Nature based & Water	1	BSC	Traditional Owners; RDV	Develop a Masterplan for Lake Tyrrell and Sea Lake township to the destination international visitor ready. This would include recommendations on visitor servicing, investment in accommodation and supporting product, and creating linkages between Sea Lake and the Lake Tyrrell site.
Little Desert Nature Lodge Destination Experience	HSC	Nhill	Accommodation	1	HSC	BGLC; Private Sector PV	Development of Little Desert Nature Lodge into a nature based tourism destination experience. This could potentially

							incorporate experiential accommodation, and/or Indigenous tours (identified as a priority in the Wimmera and Grampians Indigenous Tourism Feasibility Study).
Wimmera River Discovery Trail	HSC; HRCC	Various	Nature based & Water	1	HSC; HRCC	WDA; RDV; BGLC; PV	Identified as a priority project in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan this project involves development of the Wimmera River Discovery Trail (Cycling) stage 1 and 2, incorporating the townships of Jeparit, Dimboola, Natimuk and Horsham. This will also include an Indigenous interpretation project to complement the trail development.
Wimmera and Mallee Parks Master Plan	YSC	Wyperfeld National Park	Nature based & Water	1	PV	WWSC; HSC; BSC; YSC; BGLC; Traditional Owners	Development of a new Wimmera and Mallee Parks Master Plan that encompasses the Big Desert Wilderness Park, Little Desert National Park, and Wyperfeld National Park that identifies ongoing management requirements as well as infrastructure and facilities required to support visitation, and identifies private investment opportunities for the three parks, as appropriate. This project should also consider identification of visitor infrastructure and facilities across other reserves managed by DELWP and Local Government to provide a 'whole of Government' approach to nature based tourism in the region.
Visitor Services Review	All	All	Strategic Positioning, Industry Capacity Development & Tourism Governance	1	WMT	WWSC; HSC; BSC; YSC	Conduct a Visitor Services Review for the Wimmera Mallee Region, with the objective to increase visitor information availability and quality across the region including exploring alternate visitor servicing methods such as touchscreens and business/local ambassador programs, and improvement of existing visitor information services providers (such as Kaniva Windmill Café/VIC; Beulah Business Centre; Gateway BEET and Wonga Park Information Centre).
Wimmera Mallee Tourism Investment Attraction Plan	All	All	Strategic Positioning, Industry Capacity Development & Tourism Governance	1	WMT/RDV	WDA; WWSC; HSC; BSC; YSC	There are many private sector investment opportunities identified in this plan. However Councils have limited resources to promote investment opportunities identified in their areas. A coordinated approach to investment attraction across the region will allow for pooling of resources and development of a targeted strategy, business case for investment and digital media to market opportunities.

Regional Events Strategy	All	All	Events & Festivals	1	WMT	Grampians RDV; WWSC; HSC; BSC; YSC	Development of an Events Strategy to plan, co-ordinate and promote regional and local events across the entire Wimmera Mallee Region. Strategy development requires funding and delivery with ongoing investment in strategic events also required.
Wimmera Mallee Marketing and Brand Strategy	All	All	Strategic Positioning, Industry Capacity Development & Tourism Governance	1	WMT	WWSC; HSC; BSC; YSC	A marketing and brand strategy should be developed for Wimmera Mallee Tourism by an experienced consultant.
Wimmera Mallee Touring Project	All	All	Touring	1	WMT	Private Sector; PV	WMT to work with existing touring companies based in and around the region to develop and implement new tour itineraries for the Wimmera Mallee Region (and surrounds), including trail development for day trips to supplement the Silo Art and Lake Tyrrell Experiences; organised 4WD/Adventure trips, etc.
Heritage Museums Improvement Strategy	All	All	Arts, Culture & Heritage	2	WMT	Existing Operators	Undertake one strategic plan for heritage museums across the Wimmera which identifies the following: <ul style="list-style-type: none"> • Current approach; • Stakeholders; • Funding and resources; and • Investment needs.
Nhill Aviation Heritage Centre Upgrade	HSC	Nhill	Arts, Culture & Heritage	2	HSC	Nhill Aviation Heritage Centre	Upgrade to Nhill Aviation Heritage Centre and surrounds (currently in the planning/design stage) and exploration of further activation possibilities including events.
Murtoa Stick Shed Interpretation and Enhancement	YSC	Murtoa	Arts, Culture & Heritage	2	YSC	Private Sector	Contemporary interpretation and enhancement of the Murtoa Stick Shed, including exploring the potential to develop a twilight light installation product offer or event.
Night time silo activation	All	Various	Arts, Culture & Heritage	2	WMT	YSC; Visit Victoria; Local Artists Groups	Explore potential to partner with Natimuk-based arts/performing groups to create temporary arts-based activations on existing Yarriambiack silos in Sheep Hills, Brim, Patchewollock, Lascelles, Rupanyup, and/or Rosebery.

							This could potentially include aerial performance, shadow and/or animations/projections.
Hindmarsh Heritage Trail	HSC	Various	Arts, Culture & Heritage	2	HSC	NAHC, WMPM, Yurunga, Town Committees, Historical Societies	Build on current marketing through installation of signage and digital information
Grain-based Destination Food/Beverage Enterprise	WWSC	Kaniva/Goroke	Food, Wine & Agritourism	2	WWSC	RDV, Private Sector; Visit Victoria	Explore the potential to develop a food and/or beverage enterprise that heroes local grain product in Kaniva or Goroke such as an artisan bakery or brewery.
Rainbow Brewery Destination development	HSC	Rainbow	Food, Wine & Agritourism	1	HSC	RDV; Visit Victoria	Support current and further development and activation of Rainbow Brewery including exploring the potential for development of an accompanying gastropub dining experience and micro events.
Wimmera Grain Store Development	YSC	Rupanyup	Food, Wine & Agritourism	2	YSC	RDV; Private Sector; Visit Victoria	Explore the opportunity to expand the Wimmera Grain Store in Rupanyup to incorporate an experiential agritourism offer which could include a paddock to plate style café/tour experience.
Promoting the Grain Story	YSC	Various	Food, Wine & Agritourism	2	YSC	Private Sector; Visit Victoria	Explore opportunity to promote the 'grain story' narrative in Yarriambiack as the 'home of the pulse', encouraging local produce use and promotion in townships cafes/pubs, e.g. expansion of Rupanyup Living to include a café focused on local produce/grain.
Food and Beverage Heritage Building Activation	All	All	Food, Wine & Agritourism	2	WDA	Visit Victoria; WWSC; HSC; BSC; YSC	Identification and incentivised activation of existing vacant or underutilised heritage buildings and assets across the region with food and beverage operators.
Pub Dining Development	BSC	Sea Lake	Food, Wine & Agritourism	2	BSC	Visit Victoria; RDV; WDA	Encourage establishment of a pub style food operator in Sea Lake.
Aboriginal Cultural Heritage Centre/Keeping Place	HSC	Dimboola area	Indigenous Tourism	2	HSC	BGLC	Explore opportunities to develop an Aboriginal Cultural Heritage Centre/Keeping Place with BGLC. This could potentially be located in Dimboola.
Harrow Discovery Centre Expansion	WWSC	Harrow	Indigenous Tourism	2	WWSC	RDV; Traditional Owners; Visit Victoria	Support further development and expansion of the Harrow Discovery Centre and sound/light show.

Signature Indigenous Cricket Event	WWSC	Harrow	Indigenous Tourism	2	WWSC	BGLC	Development of a signature indigenous cricket event in Harrow to commemorate the first Australian cricket team history.
Rupanyup Township Rehabilitation Project	YSC	Rupanyup	Infrastructure	2	YSC	RDV; TfV	Rebuilding and enhancing Rupanyup township post-fires including investment in a café/bakery for the township.
Digital Infrastructure & Wifi Connectivity	All	All	Infrastructure	2	RDV		Improved digital infrastructure across the entire region including mobile phone coverage and elimination of known blackspots, and improved wifi connection provision in main townships across the region.
Jobs on the BEET Project	YSC	Hopetoun	Infrastructure	2	YSC	Gateway BEET	Development of the existing facilities at Gateway BEET to provide visitor servicing and opportunities for new business creation
Glenelg River Front Development	WWSC	Harrow	Nature based & Water	2	WWSC	RDV; Visit Victoria; Traditional Owners	Investigate redevelopment of the Glenelg River foreshore at Harrow encompassing the John Mullagh Memorial Park and connecting to the Harrow Discovery Centre - Johnny Mullagh Interpretive Centre, including sculptural trail interpretation of the Indigenous history.
Lake Tyrrell Boorong Night Skies Experience	BSC	Lake Tyrrell	Nature based & Water	2	WMT	Traditional Owners including BGLC; Private Sector; Visit Victoria; PV	Identified as a priority in the Wimmera and Grampians Indigenous Tourism Feasibility Study, this project includes development of a Boorong night skies experience at Lake Tyrrell including Indigenous cultural interpretation tours.
Lakes, Rivers and Wetlands Regional Guide	All	All	Nature based & Water	2	Parks Victoria; GMW	WWSC; HSC; BSC; YSC; Traditional Owners; WMT	Development of a Lakes, Rivers and Wetlands Regional Guide for the Wimmera Mallee Region.
Wetlands Discovery Centre	WWSC	Edenhope	Nature based & Water	2	WWSC	RDV; WMT; PV	Development of a Wetlands Discovery Centre/Centre of Excellence that promotes and interprets the West Wimmera and wider Wimmera Mallee Region's diverse wetlands assets. This should be located in close proximity to an existing wetland asset such as Lake Wallace in Edenhope.
Wyperfeld National Park Fat Biking Experience	YSC	Wyperfeld National Park	Nature based & Water	2	PV	YSC	Formalise the existing trail for Fat Biking in Wyperfeld National Park, supported by visitor infrastructure and promotion/packaging, identified as a priority in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan.

Pink Lake Activation	HSC	Pink Lake	Nature based & Water	2	HSC	WMT; PV; BGLC	Develop facilities and interpretation at Pink Lake in conjunction with Parks Victoria to ensure protection of the significant environmental and cultural values, promote their understanding and support visitation.
Lake Albacutya Recreation Activation	HSC	Lake Albacutya	Nature based & Water	2	HSC	PV, DELWP, BGLC, Lake Albacutya FOG	Activation of Lake Albacutya for recreational uses including with/without water in the lake, leverage off planned Albacutya Silo Art Trail installment
Lake Hindmarsh Recreation Activation	HSC	Lake Hindmarsh	Nature based & Water	2	HSC	PV, DEWLP, BGLC, Lake Hindmarsh FOG	Activation of Lake Hindmarsh for recreational uses including with/without water in the lake
Wyperfeld National Park – Wonga Information Hub Upgrade	YSC	Wyperfeld National Park – Wonga Campground	Nature based & Water	2	Parks Vic	Friends of Wyperfeld National Park	Upgrade the existing visitor hub.
Grampians RDV Region Cycling and Trails Infrastructure Business and Masterplan Implementation	All	All	Nature based & Water	2	WMT/RDV	PV; WWSC; HSC; BSC; YSC; RDV	Support the implementation of the Grampians RDV Region Cycling and Trails Infrastructure Business and Masterplan to support the increased development of the region’s cycling offer, including Tier 2 and Tier 3 projects identified for the Wimmera Mallee Region.

APPENDIX A POLICY KEY ACTIONS AND PROJECTS SUMMARY

Strategy/Plan	Project
Region Wide	
Wimmera and Grampians Indigenous Tourism Feasibility Study	<ul style="list-style-type: none"> • Bunjil's Songlines Tour; a 2-3 day tour visiting a number of sites including the Grampians; • Cultural tours and Ceremonial Experiences including Welcome to Country ceremonies; • Development of a Wotjobaluk Country mobile phone app to provide information, storylines and maps to visitors. • Tour guiding business with the operational hub at Wail Nursery; • Secondary School Camps at Mount Arapiles; • Tours at Little Desert Nature Lodge; and • Guided Lake Tyrrell Boorong Night Sky tours.
Wimmera Southern Mallee Regional Plan 2010-2015	<ul style="list-style-type: none"> • Development of local tourism associations in the Shires of Hindmarsh, Buloke, Yarriambiack and West Wimmera to form the foundations for sustainable tourism growth; • A regionally cooperative approach to tourism marketing across the Wimmera Southern Mallee to leverage the benefits from visitors to the Grampians; • Strengthen alignment between Tourism Victoria's Regional Tourism Marketing Plan and tourism industry development needs in the Wimmera Southern Mallee; • Development of the Grampians Long-Distance Icon Walk to strengthen the Grampians as a destination for nature based tourism; • Infrastructure provision in Halls Gap, Wartook Valley and Natimuk/Mount Arapiles to service existing tourism demand; • Assist tourism businesses in fire-prone areas to re-focus their promotion and business development; and • Foster locally significant community-driven events and festivals that stimulate tourism growth in the region".
Wimmera Southern Mallee Regional Investment Plan, 2018	<ul style="list-style-type: none"> • Western Highway Upgrade; • Mobile Phone Coverage; • Rail Freight Upgrade. <p>Tourism related advocacy projects outlined in the Plan include:</p> <ul style="list-style-type: none"> • Grampians Ring Road (Estimated Cost \$8 million); and • Wimmera River Discovery Trail; • Development of Wimmera Mallee Pioneer Museum and related tourism products (Hindmarsh Shire): <i>the project will increase tourism to the currently underutilised tourism asset. Approximate cost is \$1.6 million. Status: Ready to Go;</i> • Grampians Way (Horsham Shire): <i>Project will result in the Grampians Peaks Trail Mt Zero northern trail head being accessible by a sealed road. Approximate cost is \$0.7 million. Status: Ready to Go;</i> • Halls Gap Development Plan (Northern Grampians): <i>the project will result in increased pedestrian connectivity around Halls Gap and the Grampians National Park and investment opportunities. Approximate cost is \$2.5 million. Project Status: Ready to Go.</i>

	<ul style="list-style-type: none"> • Kaniva Community and Cultural Precinct (West Wimmera Shire): <i>the project will upgrade the Precinct and provide wetland community function areas and walking trails, upgrade the fauna park and a provide a new play space. Approximate cost is \$1.3 million. Project Status: Ready to Go.</i> • Stawell Gift (Northern Grampians): <i>ongoing funding for the event. Approximate cost is \$500 thousand annually for four years. Project Status: Ready to Go;</i> • Warracknabeal Showgrounds Free Camping Development (Yarriambiack Shire): <i>the project will result in an upgrade of the existing facilities. Approximate cost of the project is \$0.2 million. Project Status: Ready to Go.</i> • Albacutya Bridge (Hindmarsh Shire): <i>the project includes the replacement of the existing 100-year bridge and will link Lake Albacutya and Wyperfeld National Park increasing tourism. Approximate cost is \$3.3 million. Status Planning project;</i> • Aboriginal Cultural Heritage Centre, Dimboola (Hindmarsh Shire): <i>the project will develop the centre and celebrate Aboriginal heritage. The centre is also expected to attract new tourism investment and visitors. Approximate cost is \$1.8 million. Status: Planning project;</i> • Development of Recreational/Environmental Water in Rainbow (Hindmarsh Shire): <i>the project will develop a recreational water asset. Approximate cost is \$1 million. Status: Planning project;</i> • Hopetoun Aerodrome Upgrade (Yarriambiack Shire): <i>the project will support tourism opportunities. Approximate cost is \$2 million. Project Status: Planning project;</i> • Warracknabeal Aerodrome Upgrade (Yarriambiack Shire): <i>the project will support tourism opportunities. Approximate cost is \$3 million. Project Status: Planning project;</i> • Great Western Future Plan (Northern Grampians): <i>the project will use branding to improve the economic development (including tourism) of Great Western and ensure job security within the viticulture and culinary industries. Approximate cost is \$50 thousand. Project Status: Advocacy project;</i> • Walking tracks and paths in State Parks (West Wimmera Shire): <i>the project will result in increased coordination with other tourism assets. Approximate cost is \$0.5 million. Project Status: Advocacy project.</i>
<p>Grampians RDV Region Cycling and Trails Infrastructure Business And Master Plan</p>	<p>Priority projects with developed business cases:</p> <ul style="list-style-type: none"> • Ararat Trails Mountain Bike Park (\$2.2 million estimate); • Wimmera River Discovery Trail: <ul style="list-style-type: none"> • Stage 1: Dimboola to Lake Hindmarsh (\$1million estimate); and • Stage 2: Horsham to Dimboola. <p>Other Tier 1 priority projects:</p> <ul style="list-style-type: none"> • Grampians Granfondo Loop – East Loop • Grampians Trail • Halls Gap Mountain Biking – <i>Assessment and Business Case</i> • Wartook to Zumsteins – <i>Recreational Trail - Business Case</i> • Yarriambiack Small Towns Cycle Loops (Recreational trails) - <i>Audit</i> • Great Western Wine Cycle Trail (Recreational trails) - <i>Concept Plan</i> • Wyperfeld National Park Fat Biking – <i>formalise existing trail</i>

- Grampians Region Road Cycling Loops Formalisation including: Ararat-Moyston loop; Stawell Mt William Return [Grampians Wildflower Ride]; Stawell Landsborough loop; Stawell - Halls Gap – Roses Gap loop; Wonderland -Silverband loop; Halls Gap – Moyston loop; Wetlands/Lakes Trail; Mt Arapiles Loop; Horsham - Mt Arapiles Loop; and Nhill West Wimmera Loop.
 - Silo art trail (Road cycling)
 - Gravel Cycling in and Around the Grampians National Park
 - Grampians Gran Fondo Event
 - Gravel Grind Event – Grampians National Park
 - Wimmera Region Cycling Granfondo
- Tier 2 projects:**
- Mount Buangor State Park and Mt Cole State Forest mountain biking
 - Roses Gap Loop (Road Cycling)
 - Horsham -Wartook-Mt Zero Loop (Recreational cycling)
 - Yarriambiack Creek Trail (Recreational trail)
 - St Arnaud Mountain Bike Loop (Mountain biking)
 - Black Hill State Forest (Mountain biking)– *Feasibility Assessment*
 - Halls Gap to Lake Fyans (Recreational trail) - *Feasibility Study*
 - Lake Fyans Circuit Ride (Recreational trail)
 - St Arnaud to Moonambel (Recreational trail)
 - Secondary Cycling Destination Bike Hubs: Ararat, Horsham, Halls Gap
 - Kaniva to Serviceton (Recreational trail)
 - Lake Wallace Cycle Trail (Recreational trail)
 - Natimuk to Nhill Trail [Via Goroke] (Recreational trail)
 - Gravel National Championships
 - Ararat Hills 12 Hour Race
 - Mount William King of the Mountain
 - Herald Sun Tour (RDV region)
 - Great Victorian Bike Ride (RDV region)
- Tier 3 projects:**
- Edenhope Fat Bike Cross Country Loop
 - Moree Reserve Fat Bike Cross Country Loop
 - Dergholm / Bailey Rocks Mountain Bike Trail

	<ul style="list-style-type: none"> • Barrabool Nature Conservation Reserve to Murtoa – recreational trail • Barrabool Nature Conservation Reserve Cycling Trails
Grampians	
Grampians Tourism Strategic Plan 2016-2020	<ul style="list-style-type: none"> • Food and Wine - Support the implementation of the Grampians Pyrenees Wine and Culinary Masterplan and support the increased development of the regions food and wine offering. • Village Enhancement - Support the local government and other initiatives for villages within the region; • Grampians Peak Trail - encourage new products and experiences on the trail in partnership with Parks Victoria • Indigenous; promote the Grampians as destination for Aboriginal Culture and rock art. • Grampians Way; Build awareness of the Grampians Way.
Grampians Tourism Destination Plan and Investment Roadmap 2014	<ul style="list-style-type: none"> • The Grampians Peak Trail: trail through the Grampians National Park (High priority); • Grampians Region Digital Project: invest in and development digital tools to improve visitor experience in the Grampians region (High priority); • Outdoor Adventure Recreation Destination: develop including the identification and promotion, a range of adventure opportunities across the region (Medium priority); • Grampians Region Foundation Village Project: Revitalisation of Dunkeld and Halls Gap (Medium priority) • Grampians Ring Road: Route through each of the LGAs located in the Grampians region; (High priority); • Indigenous Interactive Education Product: Develop the regions Indigenous heritage targeted at key markets including international and educational (Medium priority); • Mt Arapiles Accommodation: (high priority); • Wildlife Art Museum of Australia: (medium priority); • Nature based and Eco-based accommodation (high priority); • Grampians Region Village and Produce Regions Project (medium priority); • Pomonal /Lake Fyans / Halls Gap Development Zone (low priority); • Hamilton Arts and Cultural Precinct (low priority); and • Grampians Region Events Strategy (low priority).
Ararat Visitor Economy Strategy 2018-2021	<ul style="list-style-type: none"> • WINE TOURISM Leverage off actions and momentum of Grampians Pyrenees wine plan using government funding and resources while available • Winery tours • Winery packages, collaboration and cross promotion • Winery events – either alone or as lead in events to major events in region • Pop ups • Food and wine experiences • Food and wine trail. • DARK TOURISM - Take J Ward from a volunteer model to a corporate/business model; Boutique accommodation at the dark tourism venues; The only town in Australia to have two ‘lunatic asylums’ – great opportunity to use this an anchor attraction and increase visitor numbers significantly; A game changer is needed and dark tourism has the potential to drive that change; Investigate tourism success at Port Arthur and use as a model for dark tourism growth; Accommodation at J Ward and/or Aradale would at a unique selling perspective; Development of packages that integrate local food offering, services and complementary activities; Opportunity to grow this market as experiential tourism growing rapidly – dark tourism is a huge competitive edge for Ararat; Use buildings/venues as opportunity to capture the history/intellectual property before it is lost and then tell the stories to visitors; Bring the town together collectively to market dark tourism. • NATURE BASED TOURISM - Opportunity to increase complementary activities that support core nature based activities to increase length of stay and spend; Use as leverage for major events; Opportunity to encourage new investment in the region with businesses that support NBT; Capitalise on the growing mountain biking market through the ongoing

	<p>establishment of tracks and development of a range of activities to support the core attraction; The development and implementation of the Grampians Cycling Trails Masterplan which highlights a range of activities and a strong emerging market; Updated walking track information for visitors to include facilities."</p> <ul style="list-style-type: none"> • GRAMPIANS NP - Capitalise on proximity to Grampians; Opportunity exists to further capture this existing market on Ararat's doorstep; Tie in with events in region; Opportunity to develop a strong brand in line with Grampian Tourism's recently established 'Eastern Grampians' marketing sub-region; Leverage off Grampians Tourism's established position and reach in relation to marketing activities, digital and professional development; Leverage off overflow at peak times." • LOCATION - Ararat already attracts visitors en route Melbourne ←→ Adelaide. Capturing just 10% of through traffic will have a major economic impact on both the town and the visitor economy• Opportunity to make Ararat a destination town – not a thoroughfare (bypass an opportunity not a threat and could be successful if managed right) Successful delivery of a high-quality visitor experience following completion of Ararat Arts Precinct redevelopment; Attract new investment in region; Touring route opportunity – Ballarat to Grampians driving; Cycling touring route – as identified in plans; Leverage off GSTR - a smaller sub brand/route. • HERITAGE - Storytelling – capture the history; Coordinated approach to history of town. Document stories to ensure intellectual property is not lost; Embrace Ararat's dark history to ensure flavour is carried through all museums; Capitalise on existing heritage trails and architecture through the update and promotion of print collateral; Explore technological solutions such as apps and virtual tours to increase engagement and potential for growth; Support development of the Ararat Railway Master Plan and assist Economic Development department in identifying visitor servicing opportunities; Support upcoming Gum San Cultural Heritage Centre Marketing Plan and ongoing development of the venue as an attraction" • VILLAGES - Leverage off the uniqueness of each town/village in region; Visitors are looking for unique experiences, especially accommodation; Great Western Pomonal cycling route – develop new market and encourage dispersal through region; Explore AFL Indigenous opportunities in Moyston ; Opportunity for unique events specific to each village's heritage such as the Eel Festival and the Pomonal Village Market; Food opportunities; Each village has the potential for value-added activities such as farm gates, cellar doors, food and wine trails, walking trails, photography vantage points and much more; Opportunity for integrated marketing campaign across region; Highlight diversity of region through unique town/village experiences; Trails – cycling or driving to link towns; Farmers markets – coordinated approach; Hidden gems – new markets.
<p>Grampians Pyrenees Wine Tourism and Culinary Masterplan 2017-2020</p>	<ul style="list-style-type: none"> • Identify current hero product • Create a tasting trail through the Grampians Pyrenees region; • Develop new food and wine events for each region (including with live music); • Create an Edu-tainment series; and • Continue to support existing festivals as well as bringing together more food and wine opportunities including live music opportunities. • Develop self guided tour and itineraries; • Develop and improve wine touring signage and wayfinding in the region; • Ensure distribution channels such as Visitor Centres and Civic Hubs have information/maps available for visitors. • Develop a centralised cellar door experience and/or shuttle buses. • Investigate and/or develop walking and hiking trails between wineries and/or develop/promote safe mountain and off-road cycling. • Investigate solutions (short term) to the accommodation 'style' issue by capitalising on consumer trends. • Attract restaurants and chefs to the region; • Invest in accommodation • Investigate and/or develop walking and hiking trails between wineries and/or develop/promote safe mountain and off-road cycling.
<p>Horsham EDS 2017</p>	<ul style="list-style-type: none"> • Develop a prospectus for Horsham Rural City, which promotes the area as a destination to live, work, invest and visit

	<ul style="list-style-type: none"> • Develop a destination brand for Horsham. This should be prepared in conjunction with the CAD Revitalisation project and the community. • Review a New Residents Services Strategy in Horsham Rural City. • Develop infrastructure at destination Lakes and waterways in Horsham Rural City to encourage greater visitation. • Ensure the Wimmera River Corridor Master Plan considers tourism uses • Review the Grampians Destination Plan and undertake a tourism masterplan for the Western Grampians. This will investigate private and public-sector investment opportunities and marketing approach. • New food, beverage and accommodation opportunities in the scenic Mount Zero area. This will identify ways to leverage from the Peaks Trail; • Nature based and Indigenous tourism opportunities in the Wartook Valley and Grampians National Park. This should explore accommodation investment, tour operators, Indigenous interpretation and a near complete gravel cycling loop; • Wimmera River Trail, linking Wartook with Horsham • Explore the establishment of the Wimmera River Art Trail • Attract experienced hospitality operators to Horsham to establish destination dining • Encourage the use of local produce in restaurants and cafes • Commission the preparation of a Horsham Events Strategy • Support infrastructure improvements to facilitate Sports Tourism: - Horsham Motocross; and - Wimmera Sports Stadium. • Implement the recommendations from the review of Horsham’s Visitor Information Centre
<p>Southern Grampians EDS 2011 background report</p> <p>EDS 2011-21 Strategy</p>	<p>Background Report:</p> <ul style="list-style-type: none"> • Assistance with developing new accommodation; • Rebranding Dunkeld as a destination; • Greater use of Council assets to develop a night-time culture and; • Ongoing liaison with tourism operators. <p>Strategy:</p> <ul style="list-style-type: none"> • Dunkeld and Hamilton Visitor Information Centres are identified as key tourism sites with potential to maximise future economic opportunities.
Wartook Valley Strategy 2017	<ul style="list-style-type: none"> • Wartook to Zumsteins Cycling/ Walking trail.
<p>Halls Gap Masterplan for Commercial Investment and Public Land Development</p>	<p>Priority projects:</p> <ul style="list-style-type: none"> • Events & attractions - Brewery/Distillery; Lake Bellfield Improvement; Brambuk Upgrade; Lifestyle Day Spa; Bike Trail Upgrade; Resort; Conference Facility • Services & Development - Improve Shire Services; Improved Way-finding; Interconnected Walking Tracks; Halls Gap Entry; Town Branding; Maximise Views • Halls Gap Village - Improved Walkability; Regional Produce Barn; Coordinated Design; Halls Gap Walking Loop • Public Open Space - Community Hall; Pool Shading; Event Precinct; Remove Walking Track; Village Green; Playspace Central Market; Parking <p>Other Projects:</p> <ul style="list-style-type: none"> • Events & attractions - Art Trail; Permanent Festival Infrastructure

	<ul style="list-style-type: none"> • Services & Development - Resurface Main Street; Revisit DDO; Public WiFi Hotspots; Power lines Underground; Hobby Farms & Eco Tourism • Halls Gap Village - Main Street Activation; Improve Forecourt; Stony Creek Walk; Village Densification • Public Open Space - Botanical Gardens; Commercial Opportunities; Relocate Caravan Park
Ararat Small Towns Strategy	<ul style="list-style-type: none"> • Greatest opportunities for the development of the local tourism sector are Lake Bolac, Moyston, Willaura and Pomonal.
Wimmera Mallee	
Buloke Shire Draft Economic Development and Tourism Strategy, 2018	<ul style="list-style-type: none"> • Build community capacity to facilitate economic development and tourism including through the establishment of a Buloke Economic Development and Tourism Board; • Maximize regional economic development and tourism through potential partnerships • Tourism Experience development through: <ul style="list-style-type: none"> • Continue a targeted community grants program to support events; • Assist with event promotion including Calendar of events online and in print; • Feasibility of chartered air services to tourism destinations; • Incentivise shop owners to upgrade shop facades. Council could subsidise as part of a streetscape improvement program; • Address the gaps in infrastructure facilities in towns to ensure the provision of essential, quality visitor amenities such as caravan parking, signage and improved public toilet facilities; • Develop a tourism signage strategy to encourage consistency in appearance; • Prepare a Buloke Country marketing Plan that includes; a style guide, a brand name, inclusive information and utilises commissioned photography; • Improve the online content about Buloke Shire's attractions and services; • Develop thematic trails with adjacent Shires to connect self-drive and coach visitors with key attractions and supporting services; and • Improve the distribution of visitor information.
Buloke shire council election advocacy priorities 2018	<ul style="list-style-type: none"> • Connecting Our Towns to Our Rivers • Calder Highway Streetscape Improvements • Booting Masey's Blackspots • Rural Road Renewal Fund • Building Buloke's Tourism Trail • Priority Park Upgrades
Hindmarsh Tourism Forum 2018	<ul style="list-style-type: none"> • Wimmera River Discovery Trail (potential priority trail project); • Pink Lake signage (current); • Shire interpretive signage (current); and • <i>Silo Art Trail</i> (current).

West Wimmera Annual budget Report 2017-18	<ul style="list-style-type: none"> • Targeted promotion of West Wimmera as a world-class destination; • Foster eco-tourism development; • Link our natural, cultural and historic assets to create a cohesive experience; and for visitors and residents.
Yarriambiack Shire Council Plan 2017-21	<ul style="list-style-type: none"> • Upgrades to assets and facilities, assist with creating attractive streetscapes, town entrances, parks and gardens and providing community services and facilities for the development and advocacy for regional living.
Murtoa Community Action Plan (DRAFT) 2014	<ul style="list-style-type: none"> • Murtoa - upgrades to recreational spaces such as Barrabool Nature Reserve, Lake Marma, Rabl Park and Wayside Stop Development. Further the plan promotes the Big Weekend Event and public transport improvements.
Lake Tyrrell Tourism Strategy 2016	<p>Four strategies are proposed in the Strategy to develop tourism at the Lake:</p> <ul style="list-style-type: none"> • Protect the tourism asset: key actions to achieve this include development of a land management plan with input from key stakeholders, preparation of a communication strategy and receive funding for delivery of visitor servicing infrastructure such as bollards and gates, viewing area with toilets, car park and a boardwalk; • Deliver a desirable visitor experience: key actions to achieve this include undertake tourism research, funding for visitor experience infrastructure including construction of a year-round water pond at the southern end of the lake, boom gate entry (paid) and increased signage; and collaboration with key business owners/operators to improve visitor experience; • Grow visitation and expenditure: key actions to achieve this include development of a marketing strategy, development of a strong online presence and attract investment/new tourism businesses; and • Community support for tourism: key actions to achieve this include running public meetings to discuss the role of tourism at Lake Tyrrell.

APPENDIX B DETAILED VISITOR PROFILE

8.3. VISITATION

8.3.1. STATE VISITATION FORECASTS

Domestic tourism is expected to strengthen based on continued population growth, low Australia dollar and steady economic growth. China is expected to be the largest source of growth in both inbound arrivals and expenditure for Australia in the next decade, with analysis indicating that China is estimated to generate 53 per cent of Victoria's total international expenditure in the year 2024-25 and contribute 70 % of the forecast total international visitor expenditure growth over the next decade.

FIGURE 52 REGIONAL VICTORIA FORECASTS BY PURPOSE OF VISIT

	VISITOR NIGHTS (MILLION)	2014/15	2024/25	% AAG
DOMESTIC	Holiday	20.6m	28.6m	3.4% p.a
	VFR	12.1m	15.2m	2.4% p.a
	Business	4.5m	6.4m	3.6% p.a
	Other	1.9m	2.4m	2.4% p.a
	Total Regional Victoria	39.1m	52.7m*	3.0% p.a
INTERNATIONAL	Holiday	2,456	4,122	5.3% p.a
	VFR	2,039	3,870	6.6% p.a
	<i>Business</i>	<i>173</i>	<i>159</i>	<i>-0.8%</i>
	Other	1,698	2,189	2.6%
	Total Regional Victoria	6,366	10,340	5.0%

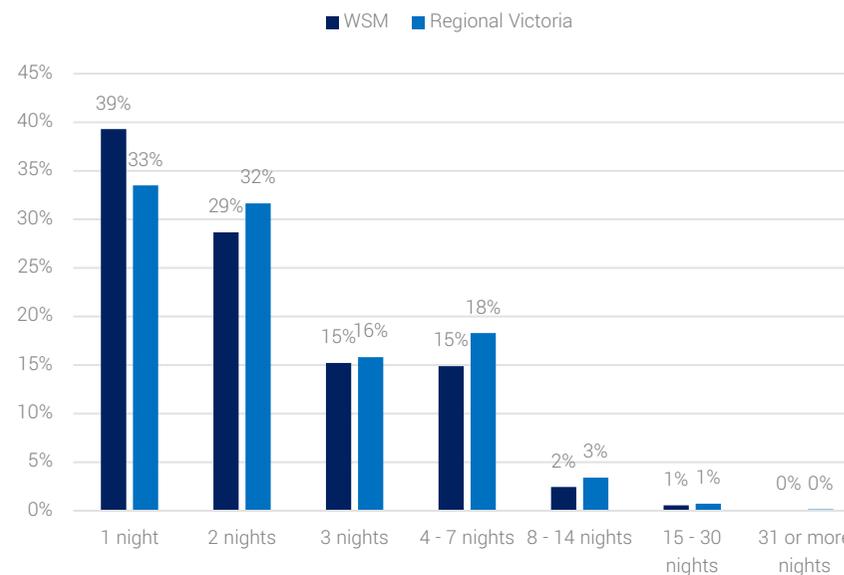
Source: Tourism Research Australia Forecast Visitation to Victoria 2016 Issue (National and State). *Total Regional Victoria Visitation for 2024/25 not equal to visitation by purpose of visit type due to rounding. Figures for business purpose visitors (in italics) are below reliable thresholds and should be interpreted with caution

8.3.2. WIMMERA SOUTHERN MALLEE VISITATION

Length of Stay

The largest share of WSM overnight visitors stayed only 1 night in the region (39%), which was shorter than for visitors to regional Victoria on average (Figure 53).

FIGURE 53 DOMESTIC OVERNIGHT VISITORS LENGTH OF STAY



Seasonality

Annually, the highest proportion of WSM domestic daytrip visitors visited the region in November, with similar peaks and troughs to regional Victoria experienced overall, with the exception of a low point in September (Figure 54).

For overnight visitors, there was again a similar seasonality profile to regional Victoria (Figure 55), with seasonal visitation peaks in January, March/April, and September, coinciding with school holidays.

FIGURE 54 DAYTRIP SEASONALITY

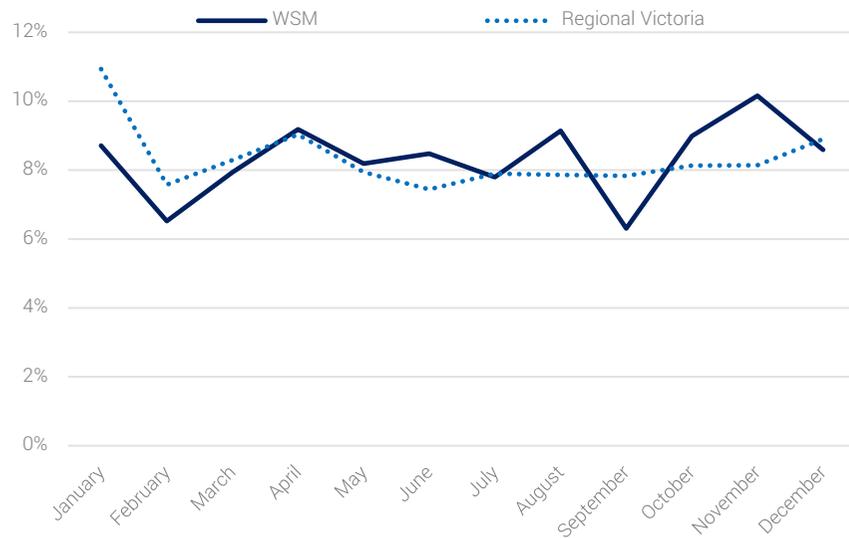
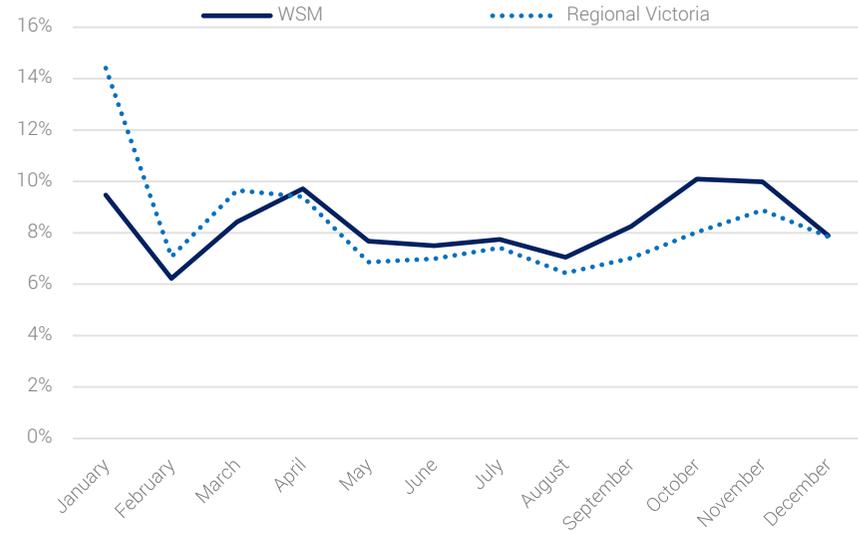


FIGURE 55 OVERNIGHT SEASONALITY



Source: TRA NVS Visitation 2008-2017 average YE Dec

Length of Stay

The vast majority (87%) of international visitors to the WSM region stayed for between 1 and 7 nights in the region, and as with domestic overnight visitation, stayed for a shorter time than for visitors to regional Victoria on average (Figure 56).

FIGURE 56 INTERNATIONAL VISITOR LENGTH OF STAY

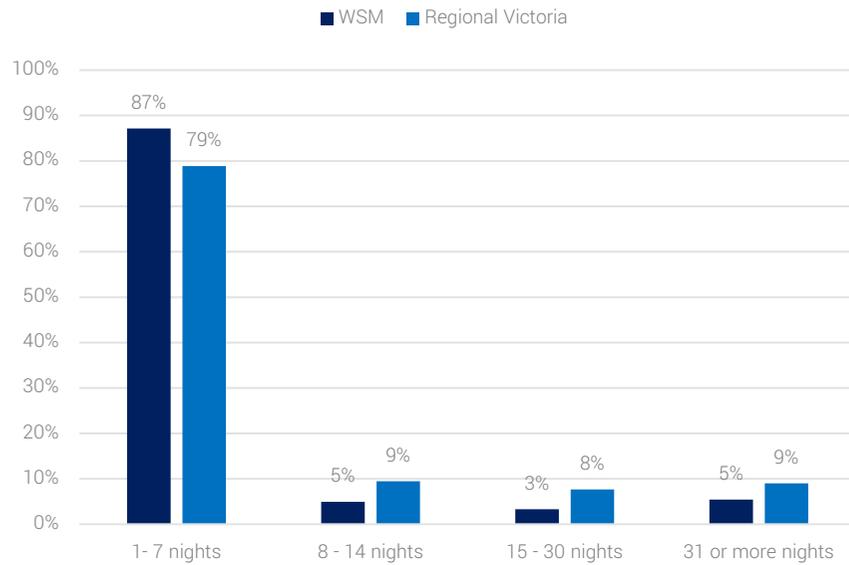
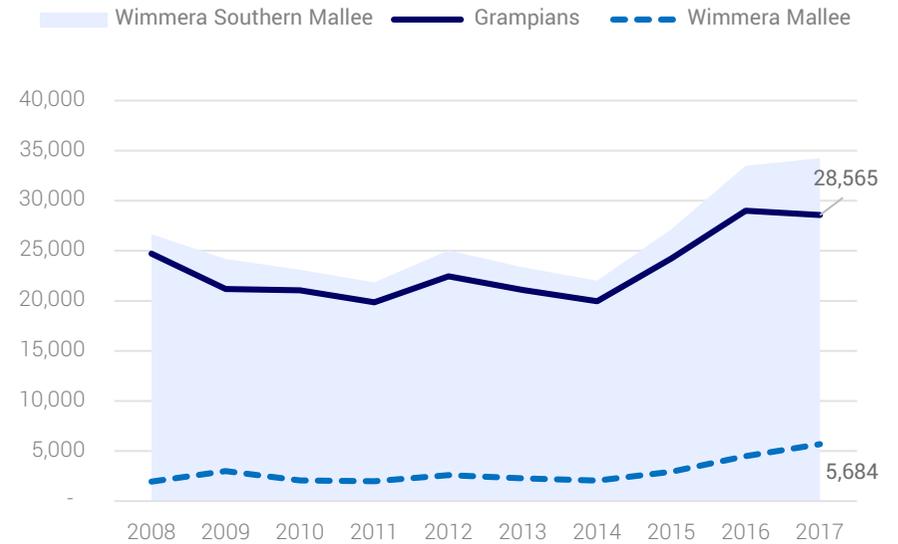


FIGURE 57 INTERNATIONAL VISITATION BY SUB-REGION



Source: TRA NVS & IVS 2008-2017 Calendar YE

8.3.3. SUB-REGION VISITATION

INTERNATIONAL VISITATION TRENDS

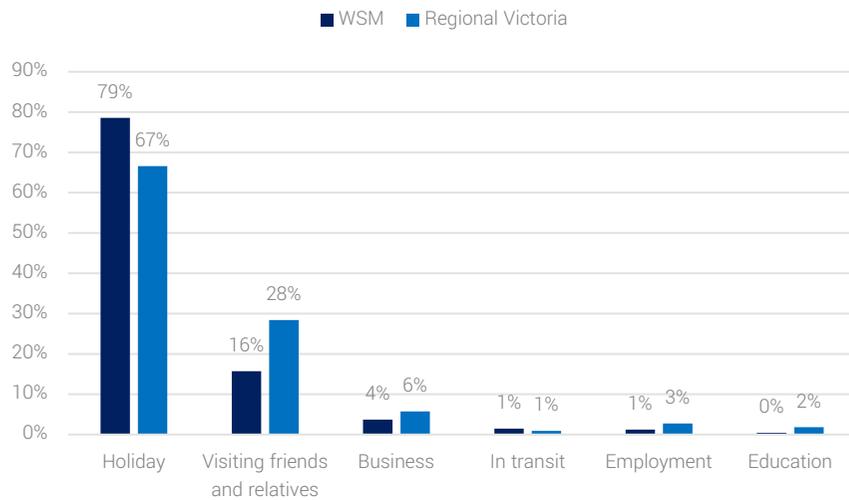
The Grampians region comprises almost all of the international visitation to the WSM region, attracting 83% of the regions international visitors in 2017. (Figure 57)

8.4. VISITOR DEMOGRAPHICS

8.4.1. WIMMERA SOUTHERN MALLEE PROFILE

Overall, 79% of international visitors to the WSM region were visiting for holiday purposes, which was higher than the regional Victorian average (67%) (Figure 58).

FIGURE 58 INTERNATIONAL VISITOR PURPOSE OF VISIT

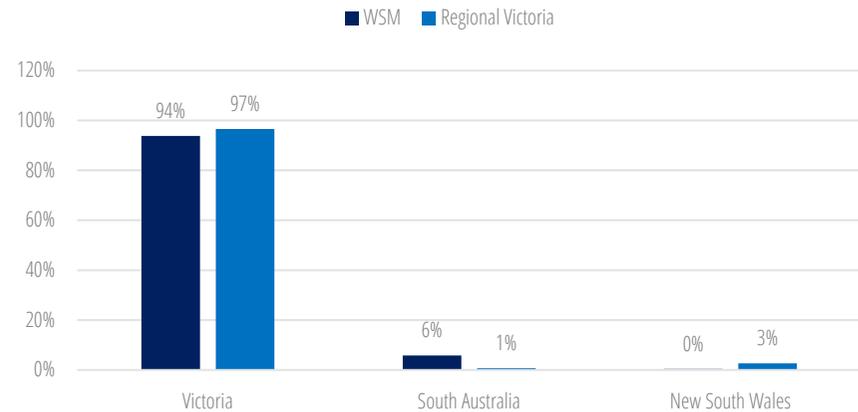


Source: TRA IVS Visitation 2008-2017 Calendar YE

VISITOR ORIGIN

The majority of the domestic daytrip visitors to the region are from within Victoria (94%). A further 6% of visitors to the region are from South Australia, which represents a higher proportion than for regional Victoria as a whole, owing to the region's proximity to the South Australian border (Figure 59).

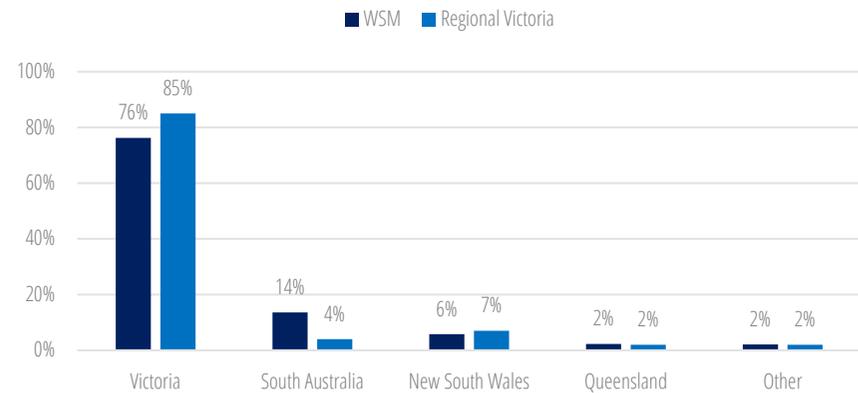
FIGURE 59 DAYTRIP VISITOR ORIGIN



Source: TRA NVS Visitation 2008-2017 Calendar YE

Significantly 14% of all overnight visitors to the WSM region originated from South Australia, owing to the proximity of the region to the SA border (Figure 60).

FIGURE 60 OVERNIGHT VISITOR ORIGIN

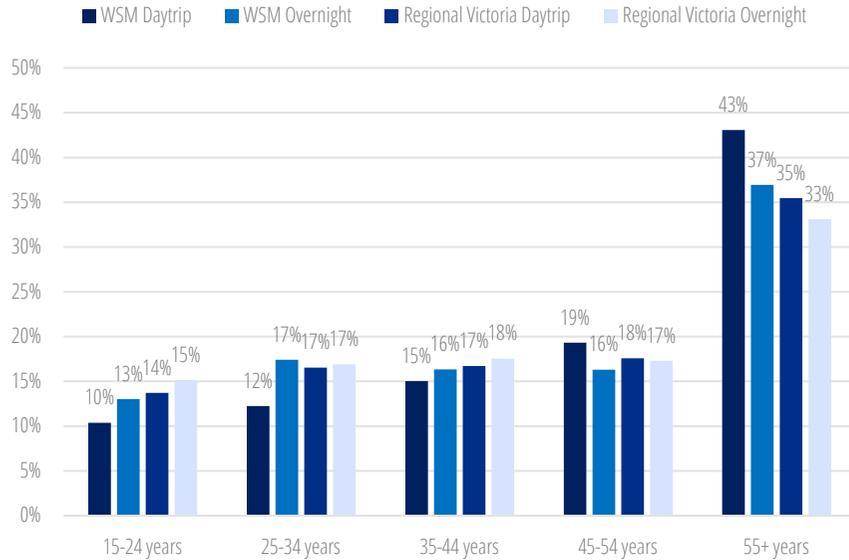


Source: TRA NVS Visitation 2008-2017 Calendar YE

AGE PROFILE

The WSM region has an older domestic visitor profile, with more visitors aged over 55, and less under 24 than for the regional Victorian average (Figure 61)

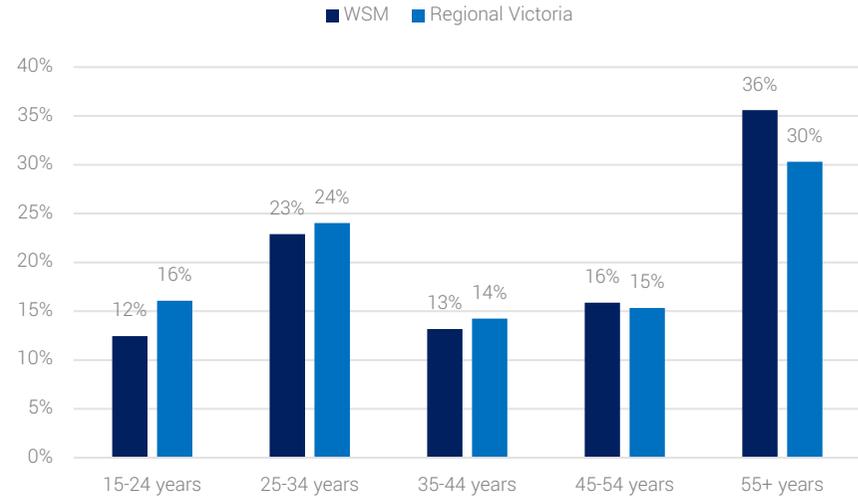
FIGURE 61 DOMESTIC VISITOR AGE PROFILE



Source: TRA NVS Visitation 2008-2017 Calendar YE

International visitors also had an older visitor profile than for regional Victoria, with a higher proportion of those aged 55 and over (36%), and lower proportion of those under 24 (12%) (Figure 62).

FIGURE 62 INTERNATIONAL VISITOR AGE PROFILE



Source: TRA IVS Visitation 2008-2017 Calendar YE

ACTIVITIES

Daytrip visitors to WSM were less likely to eat out/dine out (40%) than regional Victoria visitors on average, with a higher proportion (17%) also indicating they participated in none of the listed activities (Table 29). Visiting national parks / state forest and bushwalking / rainforest walks were more popular activities for WSM than for regional Victoria on average.

TABLE 29 TOP DAYTRIP VISITOR ACTIVITIES

ACTIVITY	WSM	REGIONAL VIC
Eat out / dine at a restaurant and/or cafe	40%	45%
Visit friends & relatives	30%	35%
Go shopping for pleasure	20%	18%
None of these	17%	11%
Sightseeing/looking around	14%	19%
Visit national parks / state parks	8%	5%
Bushwalking / rainforest walks	7%	5%
Pubs, clubs, discos etc	7%	7%
Attend an organised sporting event	4%	3%
Picnics or BBQs	4%	5%

Source: TRA NVS Visitation 2008-2017 Calendar YE

Less domestic overnight visitors to the WSM eat out/dine out (45%) than for regional Victoria on average (53%), however a higher proportion participate in bushwalking / rainforest walks (23%), and/or visiting national parks / state parks (19%) (Table 30). However, double the proportion of visitors to WSM also indicated they participated in none of the listed activities (17%), then for regional Victoria on average (6%).

TABLE 30 TOP OVERNIGHT VISITOR ACTIVITIES

ACTIVITY	WSM	REGIONAL VIC
Eat out / dine at a restaurant and/or cafe	45%	53%
Visit friends & relatives	39%	44%
Sightseeing/looking around	25%	28%
Bushwalking / rainforest walks	23%	14%
Visit national parks / state parks	19%	12%
Pubs, clubs, discos etc	17%	21%
Go shopping for pleasure	12%	21%
None of these	12%	6%
Picnics or BBQs	7%	7%
Other outdoor activities nfd	6%	4%
Visit museums or art galleries	5%	5%
Go on a daytrip to another place	4%	6%

Source: TRA NVS Visitation 2008-2017 Calendar YE

Although international visitation includes all activities participated on during the visitors' trip and not just those specifically in the stopover region, it did show that those who visited the WSM were more likely to participate in sightseeing / looking around (88%), visiting national parks / state parks (80%), bushwalking / rainforest walks (66%), and visiting botanical or other public gardens (65%), reflective of the strong nature based assets of the region. A higher portion also indicated they experienced aboriginal art / craft and cultural displays (38%), and/or visited an aboriginal site/ community (24%) as an activity during their trip (Table 31). A higher proportion also indicated they visited the outback as part of their trip (23%).

TABLE 31 TOP INTERNATIONAL VISITOR ACTIVITIES

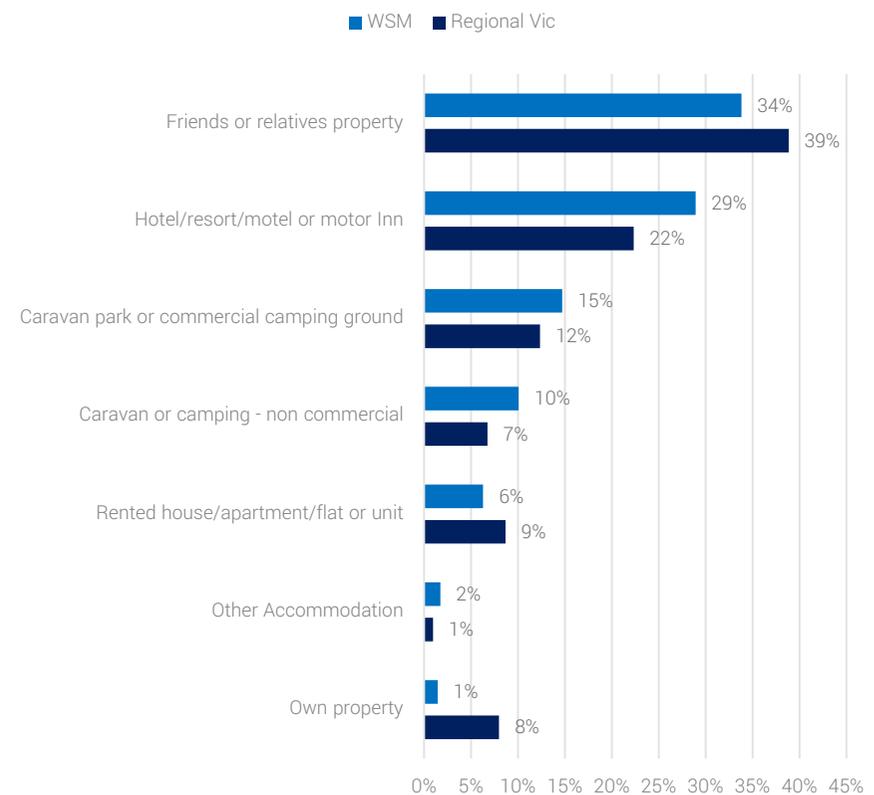
ACTIVITY	WSM	REGIONAL VIC
Eat out / dine at a restaurant and/or cafe	93%	93%
Sightseeing/looking around	88%	81%
Visit national parks / state parks	80%	65%
Go shopping for pleasure	76%	79%
Bushwalking / rainforest walks	66%	45%
Visit botanical or other public gardens	65%	52%
Go to markets	62%	59%
Visit history / heritage buildings, sites or monuments	59%	46%
Pubs, clubs, discos etc	59%	54%
Visit museums or art galleries	57%	47%
Visit wildlife parks / zoos / aquariums	53%	45%
Charter boat / cruise / ferry	43%	34%
Experience aboriginal art / craft and cultural displays	38%	21%
Go on guided tours or excursions	38%	27%
Visit wineries	35%	27%
Tourist trains	29%	24%
Visit an aboriginal site / community	24%	12%
Visit farms	24%	23%
Visit the outback (2005-2015)	23%	15%
Attend Movies/Cinema (2007 onwards)	22%	24%
Visit art / craft workshops / studios	20%	15%

Source: TRA IVS Visitation 2008-2017 average calendar YE

ACCOMMODATION TYPE

The largest share of domestic overnight visitors to the WSM region stayed with Friends or relatives (34%) although this was lower than for regional Victoria on average, with a higher proportion staying in a hotel / resort / motel or motor inn accommodation (29%) (Figure 63).

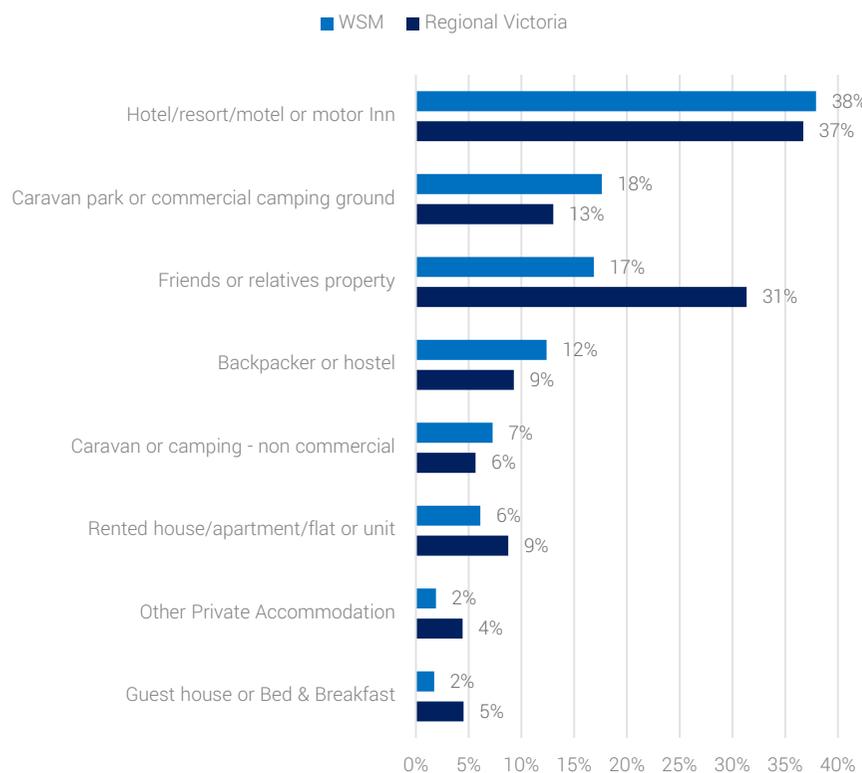
FIGURE 63 OVERNIGHT VISITOR ACCOMMODATION TYPE



Source: TRA NVS Visitation 2008-2017 Calendar YE

The majority of international visitors to the WSM region stayed in a hotel / resort / /motel or motor in (38%). As with domestic overnight visitors, a lower proportion of international visitors to WSM stayed with friends or relatives (17%), with a higher proportion staying in a caravan park or commercial camping ground (18%), or a backpacker/hostel (12%) (Figure 64).

FIGURE 64 INTERNATIONAL VISITOR ACCOMMODATION TYPE

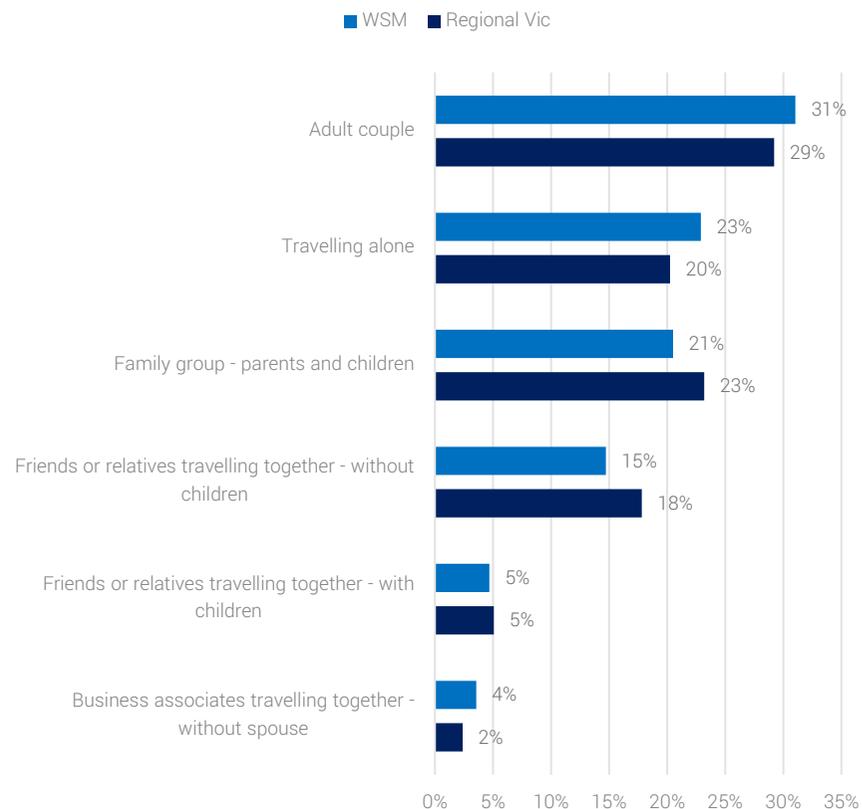


Source: TRA IVS Visitation 2008-2017 average calendar YE

TRAVEL PARTY

The largest share of domestic overnight visitors to WSM travelled as part of an adult couple (31%), followed by those travelling alone (23%) (Figure 65).

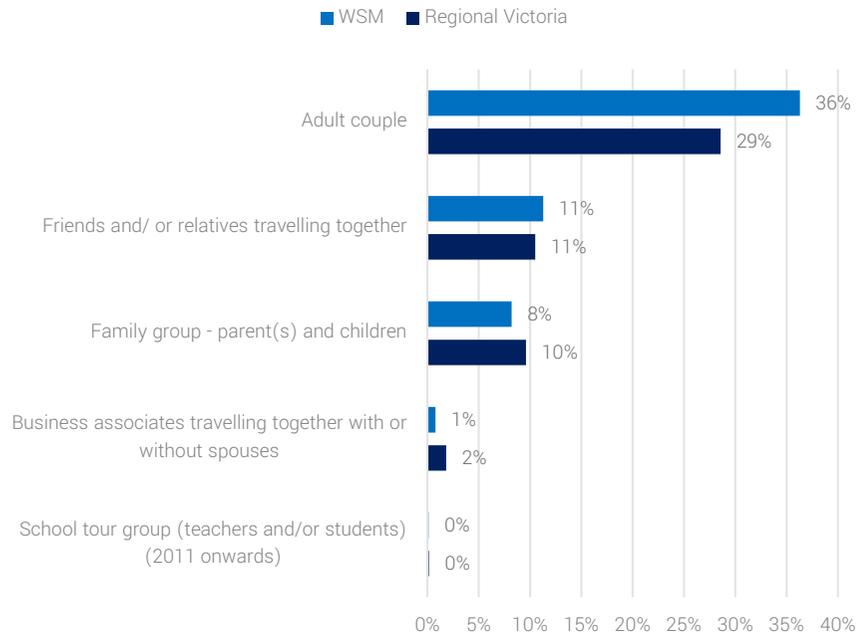
FIGURE 65 OVERNIGHT VISITOR TRAVEL PARTY TYPE



Source: TRA NVS Visitation 2008-2017 average calendar YE

International visitors to the WSM region primarily travelled as part of an adult couple (36%) (Figure 66).

FIGURE 66 INTERNATIONAL VISITOR TRAVEL PARTY TYPE



Source: TRA IVS Visitation 2008-2017 average calendar YE

TRANSPORT METHODS

Both domestic daytrip and overnight visitors to WSM predominantly travelled by private vehicle or company car (96% and 90% respectively) (Figures 67 and 68).

FIGURE 67 DAYTRIP VISITOR TRANSPORT METHOD

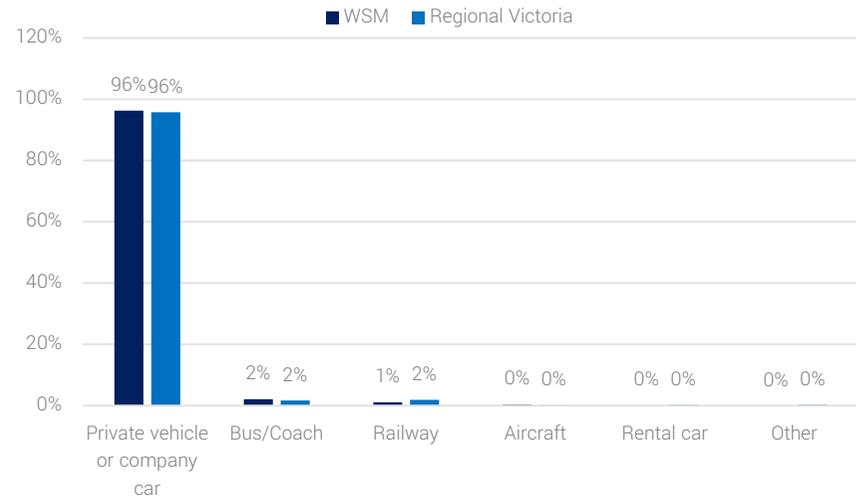
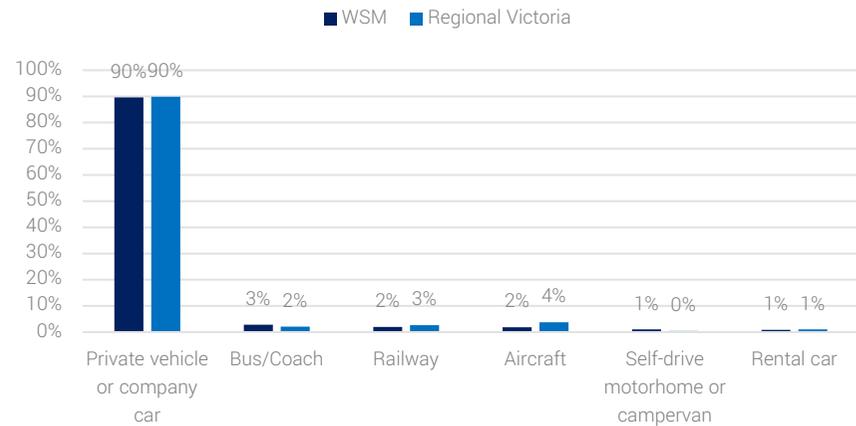


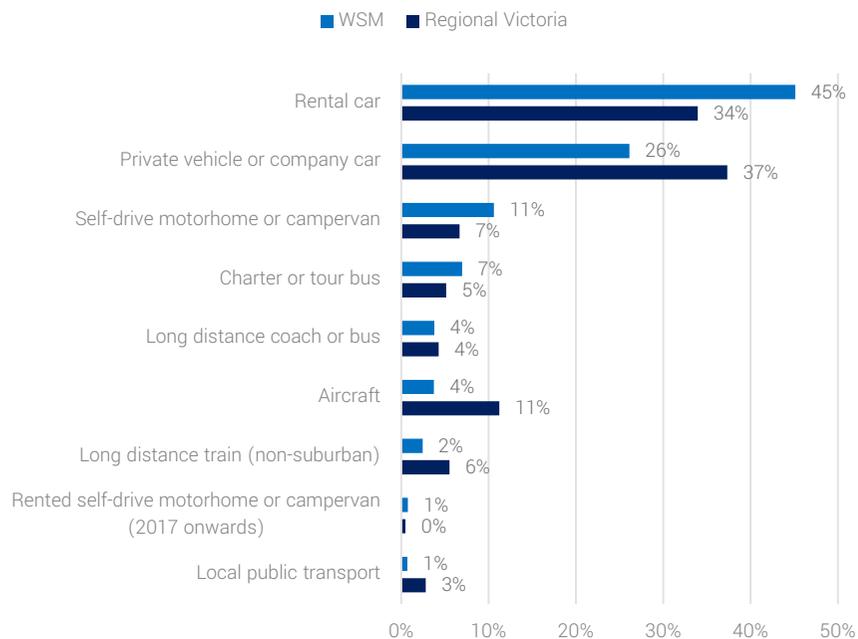
FIGURE 68 OVERNIGHT VISITOR TRANSPORT METHOD



Source: TRA NVS Visitation 2008-2017 average calendar YE

International visitors to WSM travelled primarily by rental car (45%), or private vehicle or company car (26%). A slightly higher proportion than the region Victoria average also travelled by self-drive motorhome or camper van (11%) (Figure 69).

FIGURE 69 INTERNATIONAL VISITOR TRANSPORT METHOD



Source: TRA IVS Visitation 2008-2017 average calendar YE

8.5. DOMESTIC VISITOR DEMOGRAPHICS COMPARISON

Table 32 overleaf provides a review of key demographic indicators for domestic visitors across the Grampians and Wimmera Mallee, as compared to the wider WSM region and regional Victoria.

TABLE 32 DEMOGRAPHIC KEY INDICATOR COMPARISON - SUB-REGIONS

	Daytrip Visitors				Overnight Visitors				International Visitors			
	Indicator	GRAMPIANS	WIMMERA MALLEE	WSM	Indicator	GRAMPIANS	WIMMERA MALLEE	WSM	Indicator	GRAMPIANS	WIMMERA MALLEE	WSM
Age Structure	15-24 years	10%	13%	10%	15-24 years	13%	14%	13%	15-24 years	12%	12%	12%
	25-34 years	13%	9%	12%	25-34 years	18%	16%	17%	25-34 years	23%	20%	23%
	35-44 years	15%	16%	15%	35-44 years	17%	14%	16%	35-44 years	13%	14%	13%
	45-54 years	19%	20%	19%	45-54 years	16%	18%	16%	45-54 years	16%	16%	16%
	55+ years	43%	43%	43%	55+ years	37%	38%	37%	55+ years	35%	38%	36%
Origin State/ Country (Top)	Victoria	92%	94%	94%	Victoria	77%	73%	76%	United Kingdom	18%	18%	18%
	South Australia	8%	5%	6%	South Australia	14%	14%	14%	Germany	14%	8%	14%
	New South Wales	1%	0%	0%	New South Wales	5%	9%	6%	New Zealand	12%	14%	12%
					Queensland	2%	3%	2%	United States of America	8%	9%	8%
					Other	2%	2%	2%	Other Europe	7%	5%	7%
Purpose of Visit (Top)	Holiday	37%	44%	42%	Holiday	46%	33%	43%	Holiday	81%	57%	79%
	Visiting friends and relatives	32%	24%	26%	Visiting friends and relatives	31%	43%	34%	Visiting friends and relatives	14%	28%	16%
	Other reason	16%	18%	18%	Business	16%	14%	15%	Business	3%	7%	4%
	Business	15%	14%	14%	Other reason	4%	6%	4%	In transit	1%	6%	1%
					In transit	3%	3%	3%	Employment	1%	4%	1%
					Not stated/not asked	1%	1%	1%	Education	0%	1%	0%
Activities (Top)	Eat out / dine at a restaurant and/or cafe	42%	31%	40%	Eat out / dine at a restaurant and/or cafe	47%	35%	45%	Eat out / dine at a restaurant and/or cafe	93%	88%	93%
	Visit friends & relatives	28%	36%	30%	Visit friends & relatives	36%	47%	39%	Sightseeing/looking around	88%	86%	88%
	Go shopping for pleasure	22%	11%	20%	Sightseeing/looking around	27%	19%	25%	Visit national parks / state	82%	70%	80%
	None of these	16%	20%	17%	Bushwalking / rainforest walks	26%	10%	23%	Go shopping for pleasure	76%	78%	76%

	Daytrip Visitors			Overnight Visitors			International Visitors					
	Indicator	GRAMPIANS	WIMMERA MALLEE	WSM	Indicator	GRAMPIANS	WIMMERA MALLEE	WSM	Indicator	GRAMPIANS	WIMMERA MALLEE	WSM
	Sightseeing/looking around	14%	11%	14%	Visit national parks / state parks	21%	10%	19%	Bushwalking / rainforest walks	67%	59%	66%
	Visit national parks / state parks	9%	3%	8%	Pubs, clubs, discos etc	17%	17%	17%	Visit botanical or other public gardens	65%	59%	65%
	Bushwalking / rainforest walks	8%	3%	7%	Go shopping for pleasure	13%	8%	12%	Go to markets	63%	52%	62%
	Pubs, clubs, discos etc	8%	4%	7%	None of these	10%	16%	12%	Visit history / heritage buildings, sites or	61%	46%	59%
	Attend an organised	4%	8%	4%	Picnics or BBQs	7%	7%	7%	Pubs, clubs, discos etc	60%	56%	59%
	Picnics or BBQs	4%	3%	4%	Other outdoor activities nfd	6%	3%	6%	Visit museums or art galleries	58%	47%	57%
					Visit museums or art galleries	4%	5%	5%	Visit wildlife parks / zoos / aquariums	54%	42%	53%
					Go on a daytrip to another	5%	2%	4%	Charter boat / cruise /	43%	38%	43%
									Experience aboriginal art / craft and cultural displays	39%	27%	38%

 Significantly higher  Significantly lower

Source: TRA NVS & IVS 2008-2017 average (YE December)

APPENDIX C CONSULTATION SUMMARY

The following section provides an overview of the key findings from consultation conducted with the Local Councils and industry across the WSM region through workshops conducted in region and follow up LGA survey.

8.6. KEY FINDINGS

Consultation with government and industry stakeholders was conducted through forums and an online survey of Local Government. The following are the key outcomes from consultation that need to be considered in preparation of the DMP:

- **Financial resources - Financial resources are limited from a Governance of tourism perspective. This is a particular issue for Wimmera Mallee Councils which have small rates bases, but a large geographic area to manage.**
- **Service provision - Much of the tourism industry and industry that leverages from tourism (such as retail) in the region are micro businesses, with limited providers who are hospitality trained. In some instances this results in low levels of service provision for visitors to the region.**
- **Origin markets - Key origin markets include Melbourne, Regional Victoria and South Australia.**
- **Product - Outdoors and nature based is the overwhelming strength, whilst history and heritage and water based recreation were seen as secondary strengths for the broader region.**
- **Product development - The most important areas for product development are food and wine, accommodation and heritage and arts tourism. Other areas identified as a focus for product development are events, tours, Indigenous and cycle tourism.**
- **Accommodation - Large scale quality accommodation is identified as the largest accommodation gap in the region.**

¹⁰ Horsham Rural City and Southern Grampians Shire elected not to complete the survey.

8.7. LGA SURVEY

A survey of LGAs¹⁰ was conducted to gather a range of information related to the existing and future tourism industry in the region, including product strengths, product and infrastructure development opportunities and barriers, as well as current and future visitor markets. An overview of key results is presented below.

8.7.1. ISSUES AND BARRIERS

BARRIERS TO TOURISM INDUSTRY GROWTH

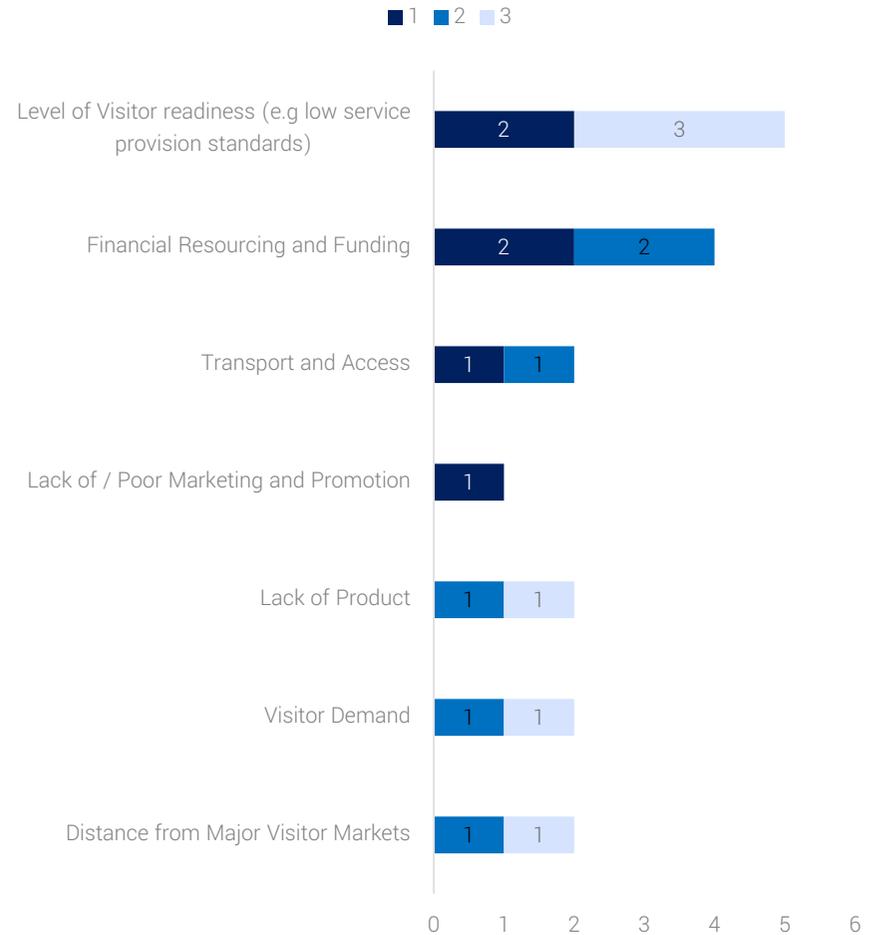
A number of issues were identified as key barriers to tourism industry growth across the region, with financial resourcing and funding, and level of visitor readiness, both a key barrier for 5 out of the 6 LGA respondents (Figure 70).

FIGURE 70 BARRIERS TO TOURISM GROWTH BY NUMBER OF RESPONDENT



Of these barriers, the Level of Visitor Readiness, and Financial Resourcing and Funding were both identified as the top barriers (Figure 71).

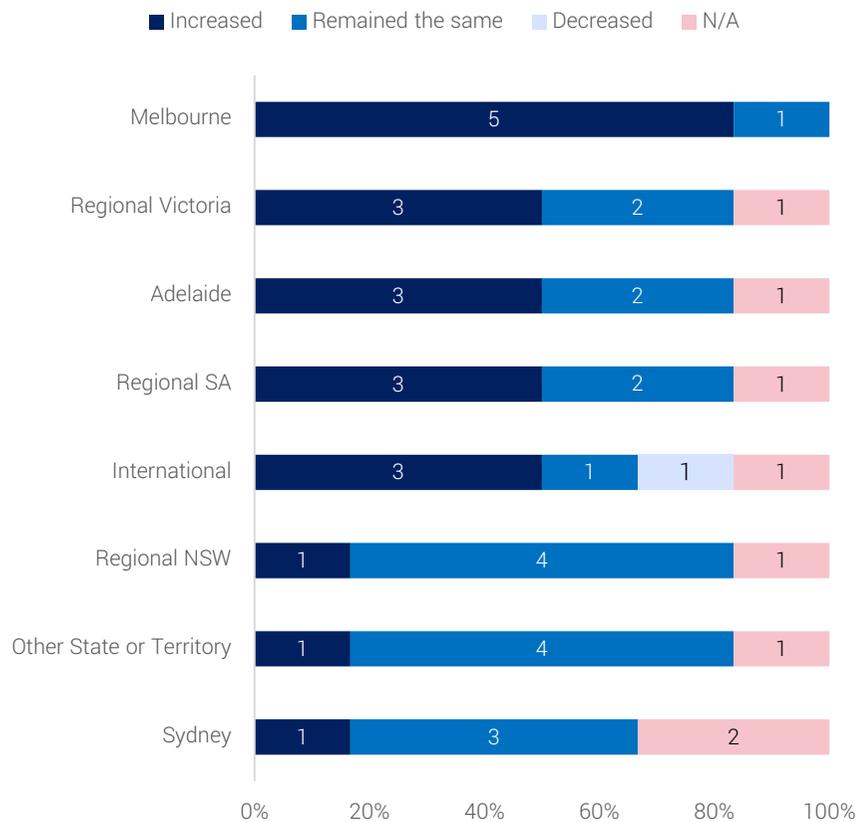
FIGURE 71 TOP TOURISM INDUSTRY BARRIERS RANKED (1 = GREATEST BARRIER) BY NUMBER OF RESPONSES



VISITOR MARKETS

Across the region, 5 of the 6 LGAs identified that the Melbourne visitor market had increased for their LGA over the last five years. Regional Victoria, Adelaide, regional South Australia, and the international market were also identified as increasing by 3 out of 6 respondents (Figure 72).

FIGURE 72 VISITOR MARKET GROWTH OVER THE LAST 5 YEARS BY NUMBER OF RESPONSES



8.7.2. PRODUCT STRENGTHS AND DEVELOPMENT OPPORTUNITIES

EXISTING TOURISM PRODUCT STRENGTHS

Across the region, LGAs identified a number of existing strengths for their respective LGAs (Table 33) with response options including

- **Agri-tourism** - local produce, farm gate
- **Arts and Culture** - painted silos, galleries, live music, performance
- **Cycling** - mountain biking, road cycling, rail trails etc
- **Dining** - restaurants, cafes
- **Events** - festivals, conferencing, major sports events etc
- **History and Heritage** - museums, heritage sites etc.
- **Indigenous** - sites and artefacts, art, tours
- **Outdoors and Nature based** - hiking, bird watching etc
- **Water Sport and Recreation** - water skiing, boating, kayaking, fishing etc
- **Wine/Beverage** - winery, breweries, distilleries

All Councils who responded identified history and heritage, and water sport and recreation, as existing strengths of their LGA. Northern Grampians identified the highest number of existing strengths.

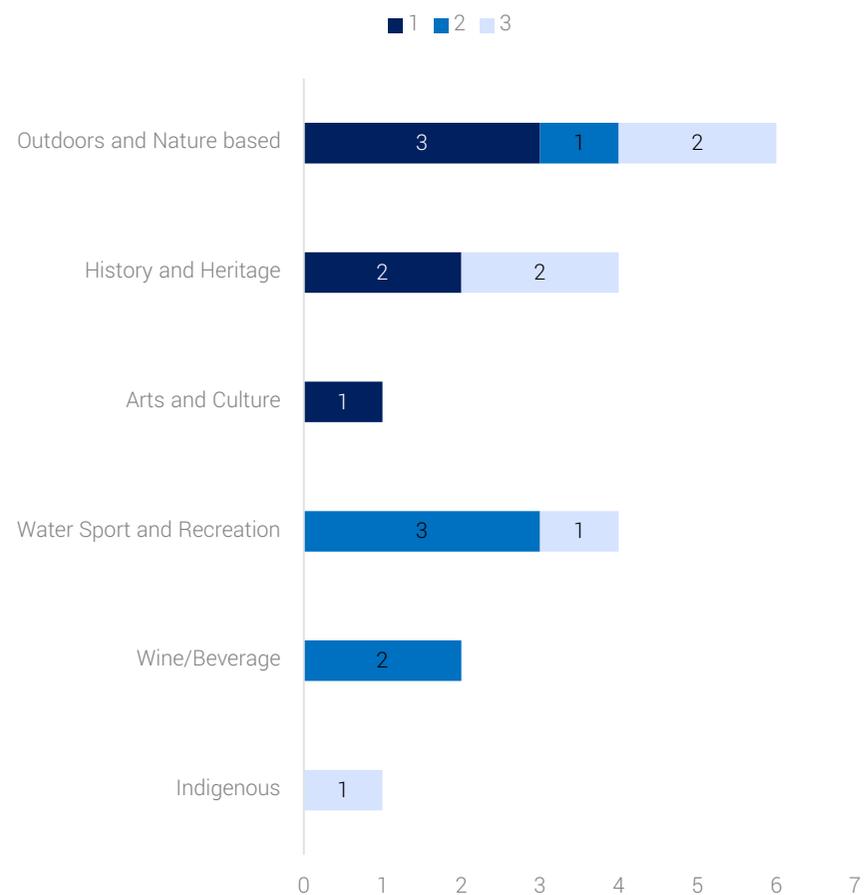
Horsham Rural City Council and Southern Grampians Shire did not provide responses to the survey.

TABLE 33 EXISTING PRODUCT STRENGTHS BY LGA

	Ararat	Northern Grampians	Buloke	Hindmarsh	West Wimmera	Yarriambiack
Agri-tourism						✓
Arts and Culture	✓			✓		✓
Cycling	✓			✓		
Dining		✓				
Events		✓	✓			
History and Heritage	✓	✓	✓	✓	✓	✓
Indigenous		✓		✓	✓	
Outdoors and Nature based		✓	✓	✓	✓	✓
Water Sport and Recreation	✓	✓	✓	✓	✓	✓
Wine/Beverage	✓	✓				

Of the above product strengths list, respondents were asked to rank their greatest tourism strengths from 1 to 3, with 1 being the greatest strength. Outdoors and nature based received the most rankings (6), with 3 Councils ranking it as the greatest strength in their LGA (Figure 73).

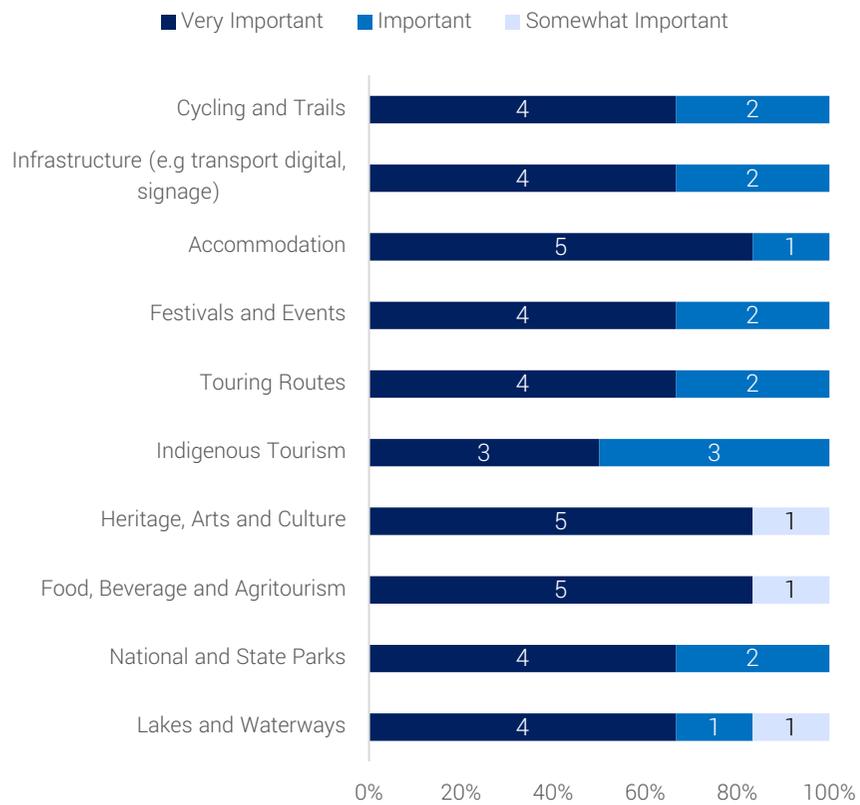
FIGURE 73 GREATEST TOURISM STRENGTH BY LGA



PRODUCT DEVELOPMENT THEMES

In ranking the importance of tourism product development themes, Accommodation, Food, Beverage and Agritourism, and Heritage, Arts and Culture, were the highest ranked, with 5 of the 6 Councils identifying these product development themes as 'Very Important' to their LGA. No themes were ranked as 'not important' or 'Not applicable' (Figure 74).

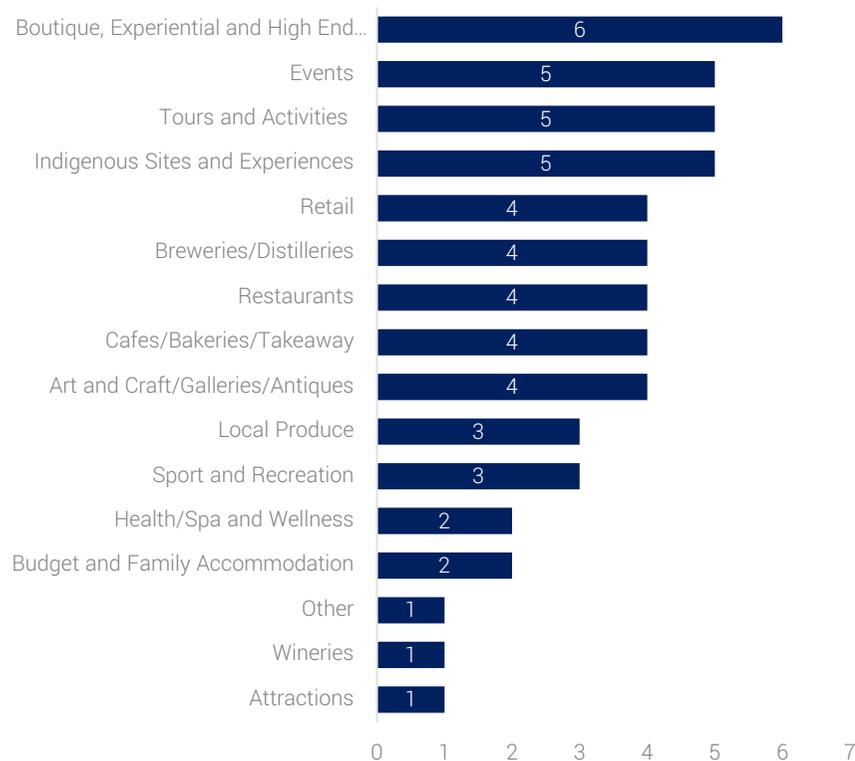
FIGURE 74 RANKED PRODUCT DEVELOPMENT THEMES



PRODUCT DEVELOPMENT OPPORTUNITIES

The development of Boutique, Experiential and High End Accommodation was identified by all Councils as an opportunity to grow the tourism industry across the region, with Events, Tours and Activities, and Indigenous Sites and Experiences also identified by 5 out of 6 Councils (Figure 75).

FIGURE 75 GREATEST OPPORTUNITY FOR TOURISM INDUSTRY GROWTH BY NUMBER OF RESPONDENTS



Inclusions within each category were as follows:

- **Boutique, experiential and high end accommodation** - hotels, boutique B&Bs, resorts, and experiential lodges and glamping;
- **Events** - festivals, conferences, conventions, group events, marketing events, functions, seminar, courses, public or trade shows, product launches, exhibitions, corporate meetings and training programs;
- **Tours and activities** - educational and farm tours, adventure parks, outdoor activities and rides;
- **Indigenous sites and experiences** - tours and cultural site interpretation;
- **Retail** - retail businesses such as gift shops which primarily service visitors;
- **Breweries/distilleries** - breweries, distilleries and other non-wine alcoholic beverage production. Establishments in this category may also have accommodation and eating facilities, however their core business is beverage production;
- **Restaurants** - restaurants, bistros, hotels and taverns;
- **Cafes/bakeries/take away** - convenience retail food, generally offering take away;
- **Art and craft/galleries/antiques** - silo art, art galleries and studios, shops selling antiques and collectibles, bookshops;
- **Local produce** - farm gate produce, provedores, produce markets;
- **Sport and recreation** - fishing, water sports, golf courses and driving ranges, horse riding etc;
- **Health/spa and wellness** - wellness centres, swimming pools, spa, and massage centres;
- **Budget and family accommodation** - caravan parks, holiday units, cottages, motels, budget lodges and motor inns;
- **Wineries** - wineries and vineyards. Establishments in this category may also have accommodation and eating facilities, however, their core business is winemaking or grape growing; and
- **Attractions** - historic sites, cinemas, gardens, and museums.

ACCOMMODATION GAPS

All LGAs identified that serviced Apartment, Self-Contained Unit, and/or Cottage was under supplied in their region, with Luxury Hotel/Resort (5) and Guest House/ Bed and Breakfast (4) also identified as key areas for accommodation undersupply (Figure 76).

FIGURE 76 EXISTING ACCOMMODATION DEMAND

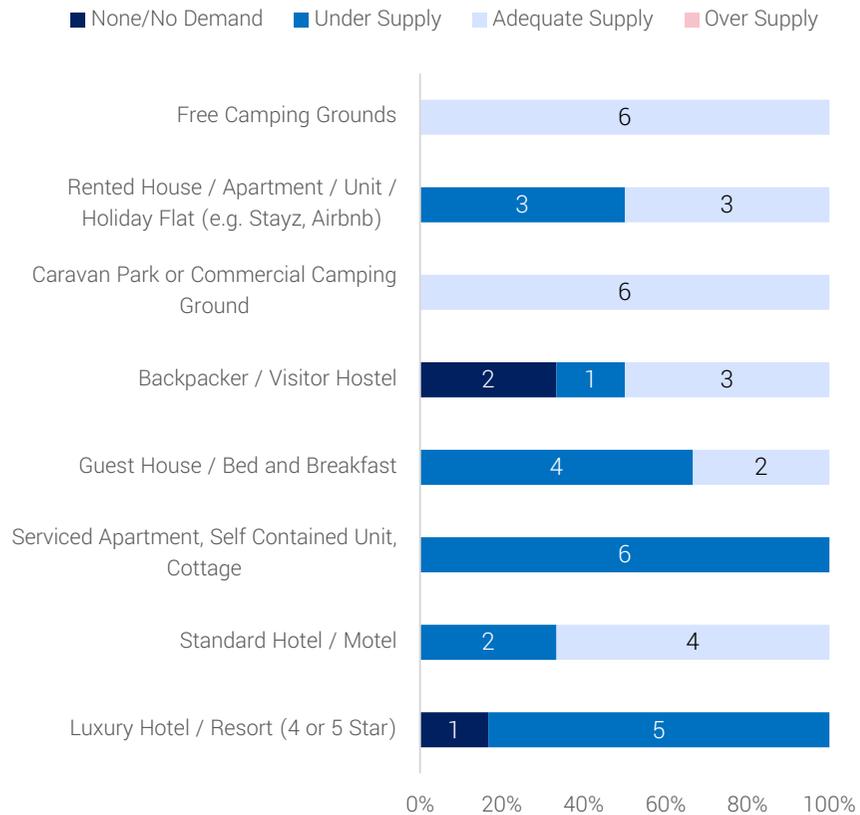


Table 34 overleaf provides a more detailed summary of key points identified during the LGA government and industry consultation workshops held across the region.

TABLE 34 CONSULTATION WORKSHOPS FINDINGS SUMMARY

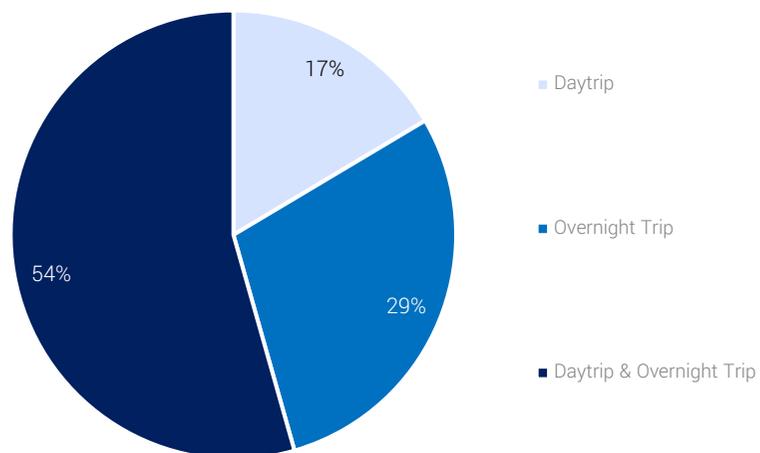
TOPIC	GRAMPIANS	WIMMERA MALLEE
TOURISM OBJECTIVES & VISION	<ul style="list-style-type: none"> • Leverage from iconic natural assets – Grampians National Park • Be recognised for a diversity of experiences • Become a premier location for Dark Tourism • Create unique cycling and adventure tourism experiences and products • Develop and promote the wine region and associated food offering 	<ul style="list-style-type: none"> • Consistent visitor servicing, professional operators • Growing and leveraging touring and ‘drive tourism’ • Experience the Victorian Outback • Increase tourism product supporting infrastructure • Develop unique agritourism experiences • Leverage from the Silo Art Trail and Lake Tyrrell through complimentary product development, infrastructure and activation
ISSUES AND BARRIERS	<ul style="list-style-type: none"> • Low unemployment rate and impact on finding staff • Lack of/quality of supporting infrastructure including public transport, roads and digital connectivity; • Lack of signage and wayfinding • Accommodation provision • Diversity of tourism product offer • Lack of supporting services such as F & B • Population attraction • Social media and digital transformation type jobs • Peoples time (Distance as the opportunity, time as the barrier) 	<ul style="list-style-type: none"> • Declining economy; • Funding limitations; • Marketing and awareness of the region; • Lack of/quality of supporting infrastructure including public transport, roads and digital connectivity; • Industry capacity and development limitations; • Township revitalisation and streetscape improvement requirements; and • Lack of signage and wayfinding • Accommodation provision • Diversity of tourism product offer • Lack of supporting services such as F & B • Population attraction • Tourism industry awareness and participation by local businesses
KEY MARKETS	<ul style="list-style-type: none"> • Nature based and adventure tourism • Broader visitor economy (business, education, health) • Events visitors (particularly sporting, food and wine, arts and culture) • Food and Wine • Dark tourism (Ararat) • VFR • Families 	<ul style="list-style-type: none"> • Touring travellers and grey nomads • Nature based • Families • Commuters • Niche events visitors • Arts and Culture visitors – Silo Art Trail • International (Asian) visitors - emerging

STRENGTHS & POSITIONING	<ul style="list-style-type: none"> • Nature based and adventure tourism • Major regional centre (Horsham) • Major events, particularly sporting, music and food and wine • Indigenous culture • Strong arts and cultural investment • Wine region • Destination dining • Arts & culture scene and creative community 	<ul style="list-style-type: none"> • Lakes, waterways and wetlands • Outback experience • Touring • Nature based • Indigenous attractions and narratives • Food bowl • Boating and fishing • Highway corridors
PRODUCT DEVELOPMENT FOCUS	<ul style="list-style-type: none"> • Conferencing and major events • Cycle tourism • Food & Wine • Nature based tourism • Indigenous tourism • Events attraction and development – sports/food and wine/performance/cultural 	<ul style="list-style-type: none"> • Agritourism and farmgate • Silo Art Trail expansion and activation • Lakes & Waterways facilities and infrastructure • Niche Events • Rural towns touring • Agricultural Heritage • River experiences • Outback experience • Wetlands interpretation and activation • Indigenous product development and interpretation

APPENDIX D MARKET RESEARCH SURVEY

In total the two sub-regional market research surveys elicited 509 total respondents, and 54% or 277 of these respondents had undertaken both a daytrip and overnight trip in the previous two years (Figure 77).

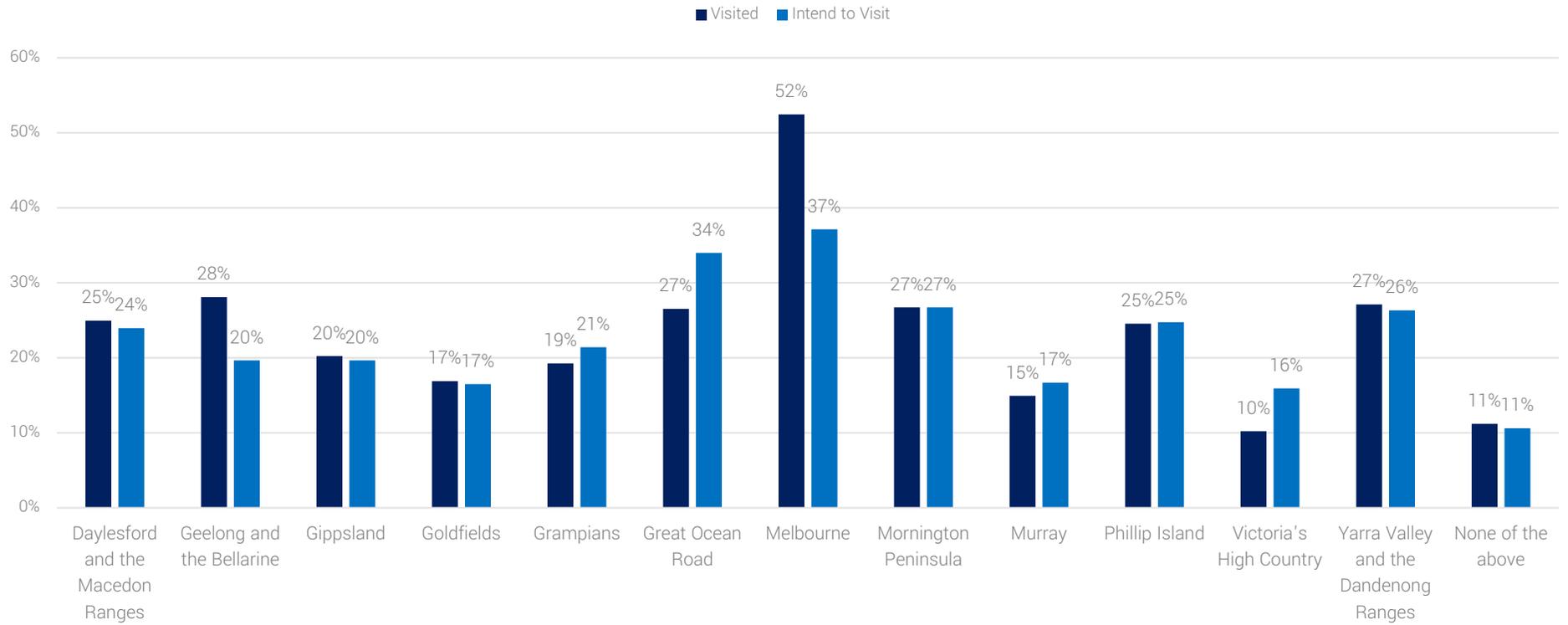
FIGURE 77 TYPE OF TRIP UNDERTAKEN BY % OF RESPONDENTS



8.7.3. VISITATION BY REGION

Visitors were asked whether they had travelled to any of Victoria's tourism regions in the past 12 months; and also whether they intended to visit within the next 12 months. Figure 78 overleaf provides a comparison of those who had visited vs those who intended to visit by region.

FIGURE 78 VISITED VS INTENTION TO VISIT BY REGION



APPENDIX E TOURISM BUSINESS CATEGORISATION

Business identified within the business audit were categorised based on adaptation of *ABS 5249.0 – Australian National Accounts: Tourism Satellite Account, 2013-2014 Appendix 1 Tourism Industry Correspondence*.

Categories used comprised the following ANZSIC classes:

RETAIL TRADE (DIVISION G)

Subdivision 40 FUEL RETAILING

- Group 400 FUEL RETAILING
 - Class 4000 Fuel Retailing

Subdivision 41 FOOD RETAILING

- Group 411 SUPERMARKET AND GROCERY STORES
 - Class 4110 Supermarket and Grocery Stores
- Group 412 SPECIALISED FOOD RETAILING
 - Class 4121 Fresh Meat, Fish and Poultry Retailing
 - Class 4122 Fruit and Vegetable Retailing
 - Class 4123 Liquor Retailing
 - Class 4129 Other Specialised Food Retailing

Subdivision 42 OTHER STORE-BASED RETAILING

- Group 421 FURNITURE, FLOOR COVERINGS, HOUSEWARE AND TEXTILE GOODS RETAILING
 - Class 4211 Furniture Retailing
 - Class 4212 Floor Coverings Retailing
 - Class 4213 Houseware Retailing
 - Class 4214 Manchester and Other Textile Goods Retailing
- Group 424 RECREATIONAL GOODS RETAILING
 - Class 4241 Sport and Camping Equipment Retailing

- Class 4242 Entertainment Media Retailing
- Class 4243 Toy and Game Retailing
- Class 4244 Newspaper and Book Retailing
- Class 4245 Marine Equipment Retailing
- Group 425 CLOTHING, FOOTWEAR AND PERSONAL ACCESSORY RETAILING
 - Class 4251 Clothing Retailing
 - Class 4252 Footwear Retailing
 - Class 4253 Watch and Jewellery Retailing
 - Class 4259 Other Personal Accessory Retailing
- Group 426 DEPARTMENT STORES
 - Class 4260 Department Stores
- Group 427 PHARMACEUTICAL AND OTHER STORE-BASED RETAILING
 - Class 4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing
 - Class 4272 Stationery Goods Retailing
 - Class 4273 Antique and Used Goods Retailing
 - Class 4274 Flower Retailing
 - Class 4279 Other Store-Based Retailing n.e.c.

ACCOMMODATION AND FOOD SERVICES (DIVISION H)

Subdivision 44 ACCOMMODATION

- Group 440 ACCOMMODATION
 - Class 4400 Accommodation

Subdivision 45 FOOD AND BEVERAGE SERVICES

- Group 451 CAFES, RESTAURANTS AND TAKEAWAY FOOD SERVICES
 - Class 4511 Cafes and Restaurants
 - Class 4512 Takeaway Food Services

- Class 4513 Catering Services
- Group 451 PUBS, TAVERNS AND BARS
 - Class 4520 Pubs, Taverns and Bars
- Group 453 CLUBS (HOSPITALITY)
 - Class 4530 Clubs (Hospitality)

TRANSPORT, POSTAL AND WAREHOUSING (DIVISION I)

Subdivision 46 ROAD TRANSPORT

- Group 462 ROAD PASSENGER TRANSPORT
 - Class 4621 Interurban and Rural Bus Transport
 - Class 4622 Urban Bus Transport (Including Tramway)
 - Class 4623 Taxi and Other Road Transport

RENTAL, HIRING AND REAL ESTATE SERVICES (DIVISION L)

Subdivision 66 Rental and Hiring Services (except Real Estate)

- Group 661 MOTOR VEHICLE AND TRANSPORT EQUIPMENT RENTAL AND HIRING
 - Class 6611 Passenger Car Rental and Hiring

Subdivision 67 PROPERTY OPERATORS AND REAL ESTATE SERVICES

- Group 671 PROPERTY OPERATORS
 - Class 6711 Residential Property Operators

ADMINISTRATIVE AND SUPPORT SERVICES (DIVISION N)

Subdivision 72 ADMINISTRATIVE SERVICES

- Group 722 Travel Agency and Tour Arrangement Services
 - Class 7220 Travel Agency and Tour Arrangement Services

ARTS AND RECREATION SERVICES (DIVISION R)

Subdivision 89 HERITAGE ACTIVITIES

- Group 891 Museum Operation
 - Class 8910 Museum Operation
- Group 892 Parks and Gardens Operations
 - Class 8921 Zoological and Botanical Gardens Operation
 - Class 8922 Nature Reserves and Conservation Parks Operation

Subdivision 90 CREATIVE AND PERFORMING ARTS ACTIVITIES

- Group 900 Creative and Performing Arts Activities
 - Class 9001 Performing Arts Operation
 - Class 9002 Creative Artists, Musicians, Writers and Performers
 - Class 9003 Performing Arts Venue Operation

Subdivision 91 SPORTS AND RECREATION ACTIVITIES

- Group 911 Sports and Physical Recreation Activities
 - Class 9112 Sports and Physical Recreation Clubs and Sports Professionals
 - Class 9113 Sports and Physical Recreation Venues, Grounds and Facilities Operation
 - Class 9114 Sports and Physical Recreation Administrative Service
- Group 912 Horse and Dog Racing Activities
 - Class 9121 Horse and Dog Racing Administration and Track Operation
- Group 913 Amusement and Other Recreation Activities
 - Class 9131 Amusement Parks and Centres Operation
 - Class 9139 Amusement and Other Recreational Activities n.e.c.

APPENDIX F GRAMPPIANS LOCAL IMPACT PROJECTS

PROJECT TITLE	LOCATION		THEME	TIER	STAKEHOLDERS	DESCRIPTION
	LGA	AREA				
Backpacker/student accommodation development	SGSC	Various	Accommodation	3	Private Sector	Investigate opportunities for a backpacker/student accommodation development in key locations through the Shire.
Boutique/luxury/glamping accommodation development	ARCC	Ararat/Moyston/Pomonal	Accommodation	3	Private Sector	Investigate opportunities for a boutique/luxury/glamping accommodation development.
Self contained accommodation development	SGSC	Hamilton	Accommodation	3	Private Sector	Investigate opportunities for a self contained accommodation development.
Mount Zero Glamping Accommodation	HRCC	Mount Zero/Laharum area	Accommodation	3	Private Sector	Development of small scale glamping accommodation in the Mount Zero area to support development of the Grampians Peaks Trail.
Sub-regional Accommodation Audit	All	All	Accommodation	3	ARCC; HRCC; NGSC; SGSC	Audit of current accommodation and identification of opportunity sites, focusing on mid/high end development.
Developing the Wool Narrative	SGSC	Hamilton and surrounds	Arts, Culture & Heritage	3	SGSC	Expansion of the Woolly West Fest and associated historical wool narrative of the Southern Grampians.
Framing the Wimmera Trail Extension, Signage and Promotion	All	All	Arts, Culture & Heritage	3	ARCC; HRCC; NGSC; SGSC	Explore opportunities to extend the Framing the Wimmera Trail, incorporating improved signage and promotion.
Gum San Cultural Heritage Centre Redevelopment	ARCC	Ararat	Arts, Culture & Heritage	3	ARCC; Gum San Cultural Heritage Centre	Enhancement and contemporary interpretation of the Gum San Cultural Heritage Centre.

Helena Rubinstein Story	SGSC	Coleraine	Arts, Culture & Heritage	3	SGSC	Interpretation of Helena Rubinstein's story in Coleraine township.
Activate Horsham Town Hall	HRCC	Horsham	Events & Festivals	3	HRCC	Further activation of Horsham Town Hall to fully utilise the venues potential, including in the conferencing space.
Grampians Region Events Strategy	All	All	Events & Festivals	3	WMT	Identified within the Grampians Tourism Destination Plan, this project involves the development of an Events Strategy to plan, co-ordinate and promote regional and local events across the entire Grampians Region. Strategy development requires funding and delivery with ongoing investment in strategic events also required.
Rolling Program of Signature Events	ARCC	Ararat	Events & Festivals	3	ARCC	Development of an Arts, Culture and Heritage based rolling events program that activates key precincts such as the redeveloped Ararat Arts Precinct (Ararat Town Hall, Ararat Performing Arts Centre, and Ararat Regional Art Gallery) and existing underutilised unique assets (such as Aradale and J-Ward). This should include new signature events that leverage from existing township strengths such as: <ul style="list-style-type: none"> • Cultural Heritage events with a contemporary creative edge; and • Arts and artisan events and/or prizes of significance.
Cavendish-Bunyip Hotel Refurbishment	SGSC	Cavendish	Food, Wine & Agritourism	3	Private Sector	Refurbishment of Cavendish-Bunyip Hotel including developing an outdoor beer garden orientated towards the Wannan river.
Dunkeld Artisans Food Festival	SGSC	Dunkeld	Food, Wine & Agritourism	3	SGSC; Private Sector	Development of a food festival of scale at Dunkeld.
Farmgate Brewery & Distillery Destination Development	NGSC	St Arnaud	Food, Wine & Agritourism	3	Private Sector	Support development of the Farmgate Brewery & Distillery in St Arnaud including glamping accommodation offer and/or destination dining.
Great Western Wine and Heritage Cycle Trail	NGSC	Great Western and surrounds	Food, Wine & Agritourism	3	NGSC	Commission development of a concept plan for the Great Western Wine and Heritage Cycle Trail, identified as a priority in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan.

Horsham Culinary Hub	HRCC	Horsham	Food, Wine & Agritourism	3	GT; HRCC	Development of Horsham as a culinary hub for the Grampians Region.
International food festival	HRCC	Natimuk area	Food, Wine & Agritourism	3	HRCC; GT	Investigate development of an annual International food festival in the Natimuk area.
Wine touring signage and wayfinding	All	All	Food, Wine & Agritourism	3	GT; ARCC; HRCC; NGSC; SGSC	Develop and improve wine touring signage and wayfinding in the region.
Arapiles Tours/Packages	HRCC	Mount Arapiles-Toooan State Park	Indigenous Tourism	3	BGLC	Support BGLC to develop tour packages / links to Mt Arapiles including training package development and potential secondary school camps, identified as a priority in the Wimmera and Grampians Indigenous Tourism Feasibility Study.
Wail Nursery Indigenous Tour Hub	HRCC	Wail	Indigenous Tourism	3	BGLC; PV	Identified as a priority in the Wimmera and Grampians Indigenous Tourism Feasibility Study, this project includes working with the BGLC to establish a guided tour operation which operates out of Wail Nursery.
Wimmera and Grampians Indigenous Tourism Feasibility Study Implementation	Various	Various	Indigenous Tourism	3	Grampians Tourism; Traditional Owners; RDV	Support the implementation of the Wimmera and Grampians Indigenous Tourism Feasibility Study to support the increased development of the region's Indigenous tourism offer, including other business concepts identified for the Grampians Region.
Sporting Infrastructure Enhancements	HRCC	Horsham	Infrastructure	3	HRCC	Further develop and leverage sporting infrastructure to support attraction and development regional scale competition and events including investigating the potential for enhancement of key Horsham sporting assets including Horsham Aquatic Centre, Horsham Golf Club and Horsham Motorcycle Club and Dooen Recreation Reserve.
Horsham Rural City Prospectus	HRCC	All	Infrastructure	3	HRCC	Develop a prospectus for Horsham Rural City, which promotes the area as a destination to live, work, invest and visit.
Winfields Road Progressive Sealing	HRCC	Laharum	Infrastructure	3	HRCC	Support the progressive sealing of Winfield's Road in Laharum.

Central Park Stawell Gift Enhancement	NGSC	Stawell	Infrastructure	3	NGSC	Implementation of new fencing for Central Park which commemorates the history of the site with the annual Stawell Gift event.
VIC Enhancement Study	All	Various	Infrastructure	3	Grampians Tourism; ARCC; HRCC; NGSC; SGSC;	Explore opportunities to enhance Visitor Information Centres across the region in line with the new VIC guidelines and previously completed reports such as Horsham's Visitor Information Centre Review. This should include exploration of mechanisms to maximise future economic opportunities as well as training, service quality and volunteer recruitment.
Grampians Region Village and Produce Regions Project	All	Various	Infrastructure	3	GT; ARCC; HRCC; NGSC; SGSC;	Identified as a medium priority in the Grampians Tourism Destination Plan, this project involves activation of regional towns to attract visitors (Natimuk, Wartook-Laharum, Coleraine, Great Western, St Arnaud, Henty Wine Region) Strategic planning varies from non-existent to in-progress depending on the village / produce region.
Stawell CBD Revitalisation Project	NGSC	Stawell	Infrastructure	3	NGSC	Support completion of the Stawell CBD Revitalisation Project which is currently underway. This project will enhance the attractiveness and functionality of the main commercial precinct of Stawell, improving the experience of shopping, dining and using services located on Main Street for both the local community and visitors to the region.
Stawell Gateway Enhancement Project	NGSC	Stawell	Infrastructure	3	NGSC	Identify options and design concepts for works and signage that will capitalise on traffic bound for the Grampians and encourage traffic to turn into the township of Stawell.
Waterway Infrastructure, Signage and Interpretation Upgrades	All	All	Nature based & Water	3	PV; ARCC; HRCC; NGSC; SGSC; CMA; GMW; Traditional Owners	Identification of required infrastructure, signage and interpretation improvements for sites across the region including lakes, dams and wetlands as per the corresponding Recreation Management Plan(s) (where they exist). This should include supporting accessible infrastructure installed or upgraded at key sites (including boat ramps, toilets, etc), as well as the provision of interpretation and signage to highlight key lake, dam and wetland features across the region.
Grampians Trail	NGSC; ARCC	various	Nature based & Water	3	ARCC; RDV	This project involves the development of a recreational trail including the preparation of a detailed concept and business case, identified as a priority in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan.
Halls Gap Mountain Biking – Assessment and Business Case	NGSC	Halls Gap	Nature based & Water	3	NGSC; RDV; GT; CMA; PV	Halls Gap Mountain Biking – Assessment and Business Case development, identified as a priority in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan.

Grampians Granfondo Loop – East Loop	NGSC; ARCC	Various	Nature based & Water	3	NGSC; ARCC; RDV	This project was identified as a priority in Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan and incorporates development of the Grampians Granfondo Loop – East Loop.
Grampians Gran Fondo Event	NGSC; SGSC	Grampians National Park	Nature based & Water	3	GT; NGSC; ARCC; HRCC; PV	Establish and promote a Grampians Gran Fondo Event, identified as a priority in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan.
Gravel Cycling	NGSC; SGSC	Grampians National Park	Nature based & Water	3	GT; NGSC; SGSC; PV	Gravel Cycling in and Around the Grampians National Park, identified as a priority in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan.
Gravel Grind Event	NGSC; SGSC	Grampians National Park	Nature based & Water	3	GT; HRCC; NGSC; SGSC; PV	Establish and promote a Gravel Grind Event at the Grampians National Park, identified as a priority in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan.
Volcanic History Enhancement	SGSC	Various	Nature based & Water	3	SGSC; PV	Interpretation and promotion of the Volcanic history of the region, including enhancement of the Volcano Discovery Centre and associated volcanic assets and trails.
Grampians Region Road Cycling Loops Formalisation	All	All	Nature based & Water	3	GT; RRV; PV	This project was identified as a priority in Grampians RDV Region Cycling And Trails Infrastructure Business And Master Plan and incorporates Grampians Region Road Cycling Loops Formalisation including: Ararat-Moyston loop; Stawell Mt William Return [Grampians Wildflower Ride]; Stawell Landsborough loop; Stawell -Halls Hap – Roses Gap loop; Wonderland -Silverband loop; Halls Gap – Moyston loop; Wetlands/Lakes Trail; Mt Arapiles Loop; Horsham - Mt Arapiles Loop; and Nhill West Wimmera Loop.
Rocklands Reservoir Enhancement and Activation	HRCC; SGSC	Rocklands Reservoir	Nature based & Water	3	HRCC; SGSC; Fisheries Victoria; GWM Water; Existing User Groups; DELWP	Update the Recreation Management Plan for Rocklands to reflect the Fisheries Victoria stocking program and ensure facilities / infrastructure meets the needs, and maximises the benefits of, additional visitors.
Toolondo Reservoir Enhancement and Activation	HRCC	Toolondo	Nature based & Water	3	GWM Water; Existing User Groups; HRCC	In conjunction with user groups, finalise development of a Recreation Management Plan for the Toolondo foreshore area, informed by current water plan for the system. This should include identification of facilities and infrastructure required to support use of Toolondo Reservoir as a recreational fishing asset of national significance (trout fishing), as well as further develop its role as a family recreation destination,

						including potential playground development and interpretation of its role as the largest wetland in the south-west Wimmera wetlands system.
Wimmera River Art Trail	HRCC	Horsham	Nature based & Water	3	HRCC; Local Artists Groups; Traditional Owners	Explore the establishment of a Wimmera River Art Trail along the section of the Wimmera within the urban boundary of Horsham CBD.
Mt. Langi Ghiran Scenic Route and Tourism Development Plan Implementation	ARCC	Various	Touring	3	ARCC	Development/ implementation of the Mt. Langi Ghiran Scenic Route and Tourism Development Plan.

APPENDIX G WIMMERA MALLEE LOCAL IMPACT PROJECTS

PROJECT TITLE	LOCATION		THEME	TIER	STAKEHOLDERS	DESCRIPTION
	LGA	AREA				
Free Camping Audit	All	All	Accommodation	3	WWSC; HSC; BSC; YSC	Conduct an audit of existing free camping facilities across the region and determine any infrastructure and/or capacity development required.
Harrow accommodation development	WWSC	Harrow	Accommodation	3	Private Sector	Medium scale accommodation at Harrow to cater for bus trips and events.
Hotel/Pub Accommodation Audit	YSC	All	Accommodation	3	Private Sector	Upgrade of existing hotel/pub accommodation quality audit and support for operators requiring upgrade.
Lake Camping Accommodation Development	BSC	Lake Tyrrell; Lake Buloke	Accommodation	3	Private Sector; Traditional Owners	Development of camping accommodation and infrastructure at Lake Tyrrell and Lake Buloke.
Lake Experiential Accommodation Development	WWSC	Wallace, Ratzcastle, Charlegrark, and Bringalbert Lakes	Accommodation	3	Committees of Management; Traditional Owners	Explore opportunities for additional experiential accommodation opportunities such as glamping with existing Committees of Management at key lake locations in the Shire including Lake Wallace, Lake Charlegrark, and/or Lake Bringalbert.
Kaniva Cultural and Tourism Precinct	WWSC	Kaniva	Arts, Culture & Heritage	3	WWSC	Completion of the Kaniva Cultural and Tourism Precinct based around the wetlands, fauna park and children's play space on the highway including signage and connection of it to the township.
Overlander Museum Activation	WWSC	Kaniva	Arts, Culture & Heritage	3	WWSC	Promotion and activation of Overlander Museum currently under development.
Serviceton Historical Precinct	WWSC	Serviceton	Arts, Culture & Heritage	3	WWSC	Enhancement and activation of the Serviceton Historical Precinct Story including expansion of the disputed territory history, potential tours and/or event.
Streetscape Beautification Project	YSC	Warracknabeal	Arts, Culture & Heritage	3	YSC	Art based streetscape beautification project based around street brightening, mural activations and sculptures.
Streetscape Identity Project	WWSC	Edenhope	Arts, Culture & Heritage	3	WWSC	Art based township identity project based around bird symbology - sculptural/murals.
Warracknabeal Courthouse Transformation	YSC	Warracknabeal	Arts, Culture & Heritage	3	YSC	Transform the old Warracknabeal Courthouse into a community arts space/artist in residence to capitalise on the restoration work completed and activate the building, including commissioning and installing a commemorative Nick Cave Statue in the Courthouse precinct. There is also opportunity to link this project with the Horsham Artist in Residents project along the Wimmera River.
Wimmera Mallee Pioneer Museum Upgrade	HSC	Jeparit	Arts, Culture & Heritage	3	HSC	Upgrades to Wimmera Mallee Pioneer Museum in line with recommendations from the Masterplan and Interpretation Plan finalised in 2016 (awaiting funding estimated \$125k).

Woomelang Railway Station Upgrade	YSC	Woomelang	Arts, Culture & Heritage	3	YSC; VicTrack	Upgrade of the railway station for use as a community space and a maker's gallery.
Yurunga Homestead Investment	HSC	Rainbow	Arts, Culture & Heritage	3	HSC	Investment in Yurunga Homestead interpretation, visitor experience and supporting infrastructure.
Develop the Auchmore Museum Visitation Experience	BSC	Nullawil	Arts, Culture & Heritage	3	BSC	Continue adding to the museum and develop its potential as a bus tour stop for guided tours and the provision of a lunch or evening meal.
Art Deco Cinema Experience	BSC	Nullawil	Arts, Culture & Heritage	3	BSC	Support development of the Rex Art Deco Cinema in Charlton.
Sea Lake Art Activation	BSC	Sea Lake	Arts, Culture & Heritage	3	BSC; Private Sector	Art interpretation for Sea Lake township and surrounds including painting of a Silo and highway fence/outdoor building walls.
Masonic Hall Heritage Project	YSC	Rupanyup	Arts, Culture & Heritage	3	YSC	Rejuvenation project at the masonic hall to celebrate Rupanyup's history in a creative and engaging way.
Cronomby Tanks Lighting Installation	YSC	Woomelang	Arts, Culture & Heritage	3	YSC	Creative lighting installation at Cronomby Tanks/ wetlands/caravan park.
Esoteric Festival Site Development	BSC	Donald	Events & Festivals	3	Esoteric Festival; BSC	Support upgrade of the Esoteric Festival site to a permanent music performance venue, available for use by other regional performances.
Wimmera River Discovery Trail Tours	HSC	Various	Indigenous Tourism	3	HSC; PV; BGLC	Wimmera River Discovery Trail tour guiding opportunities (on and off river) incorporating Indigenous and/or flora and fauna interpretation of the Wimmera Heritage River.
Wimmera and Grampians Indigenous Tourism Feasibility Study Implementation	Various	Various	Indigenous Tourism	3	WMT; Traditional Owners; RDV; PV	Support the implementation of the Wimmera and Grampians Indigenous Tourism Feasibility Study to support the increased development of the region's Indigenous tourism offer, including other business concepts identified for the Wimmera Mallee Region.
Albacutya Bridge replacement	HSC	Rainbow	Infrastructure	3	HSC	Replacement of Albacutya Bridge.
Buloke Township Masterplans	BSC	Various	Infrastructure	3	BSC	Implementation of streetscape beautification works as identified in associated master planning.
Calder Highway Streetscape Improvements	BSC	Various	Infrastructure	3	BSC	Streetscape Improvements along the Calder Highway.
Davis Park Upgrade	HSC	Nhill	Infrastructure	3	HSC	Upgrade to Davis Park (sport and rec) facilities in Nhill, estimated \$600k.
Dimboola, Nhill, Jeparit, and Rainbow Township revitalisation	HSC	Dimboola, Rainbow, Jeparit, Nhill	Infrastructure	3	HSC	Revitalisation of townships including streetscape beautification and activation.

Streetscape Revitalisation and Beautification Project	WWSC	Edenhope, Kaniva, Goroke, Serviceton	Infrastructure	3	WWSC	Township revitalisation and art based streetscape beautification project of the key West Wimmera townships of Edenhope, Kaniva, Goroke, Serviceton. This could potentially include street brightening, mural activations and sculptures across key Yarriambiack townships.
Streetscape Improvement Program	BSC	Various	Infrastructure	3	BSC	Incentivise shop owners to upgrade shop facades.
Warracknabeal Golf Course Upgrade	YSC	Warracknabeal	Infrastructure	3	YSC	Upgrade of Warracknabeal Golf Course.
Showgrounds Development	YSC	Warracknabeal	Infrastructure	3	YSC	Upgrading the Warracknabeal Showgrounds Reserve to accommodation free camping and visitor facilities.
Caravan Park Infrastructure Upgrades	BSC	Various	Infrastructure	3	BSC	Modernise caravan park infrastructure at all caravan parks throughout the shire.
Develop Kaniva as an Accessible Township	WWSC	Kaniva	Infrastructure	3	WWSC	Developing and promoting Kaniva as an accessibility friendly stopover destination between Melbourne & Adelaide, including the potential to install all-access play equipment at the wetlands and complete infrastructure work around the Kaniva streetscape to make shop fronts more accessible.
Glenelg River Enhancement	WWSC	Various	Nature based & Water	3	WWSC; PV	Glenelg Hopkins CMA survey of Glenelg River to identify potential recreational enhancements and activation projects including: walking tracks, signage, broad walks, bird watching etc.
Goroke Little Desert Gateway Development	WWSC	Goroke	Nature based & Water	3	WWSC; PV	Develop Goroke as the southern gateway to Little Desert National Park with a focus on family visitors through supporting development of, and promoting, the Little Desert Nature Playspace.
Ross Lakes Wetlands & Interpretation	HSC	Ross Lakes	Nature based & Water	3	HSC	Finalise and implement findings of the study of environmental water supply to Ross Lakes, south of Lake Albacutya to re-establish wetland ecosystem, including Indigenous interpretation of the lakes.
Tyrrell Creek Interpretative Signage	BSC	Tyrrell Creek	Nature based & Water	3	BSC	Completion and implementation of the CMA Mallee interpretive signage project and initiatives.
Waterway Infrastructure, Signage and Interpretation Upgrades	All	All	Nature based & Water	3	WWSC; HSC; BSC; YSC; Traditional Owners; PV	Identification of required infrastructure, signage and interpretation improvements for sites across the region including lakes, dams and wetlands as per the corresponding Recreation Management Plan(s) (where they exist). This should include supporting accessible infrastructure installed or upgraded at key sites (including boat ramps, toilets, etc), as well as the provision of interpretation and signage to highlight key lake, dam and wetland features across the region.
West Wimmera Recreational Trails Strategy Implementation	WWSC	Harrow; Edenhope; Kaniva	Nature based & Water	3	WWSC	Support implementation of the West Wimmera Recreational Trails Strategy including activation of priority projects at Harrow, Edenhope & Kaniva including Glenelg River Walk, upgrade of Lake Wallace walkway, and development of further walking tracks around Kaniva.

Wimmera Mallee 4WD Enduro Series	All	All	Nature based & Water	3	Event Organiser; Land Managers	Investigate development of a Wimmera Mallee 4WD racing/Enduro event series which leverages from the success of the Rainbow Desert Enduro and Rainbow Risers 240 and potentially incorporates one of these events as a stage of the series.
Wimmera Region Cycling Granfondo	All	All	Nature based & Water	3	WMT; WWSC; HSC; BSC; YSC	Development of a Wimmera Region Cycling Granfondo, identified as a priority in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan.
Wimmera River Heritage Walk	HSC	Various	Nature based & Water	3	HSC; PV; BGLC	Explore the potential for development of a Wimmera River Heritage Walk (including review of previous concepts/plans) and potential connection to the Wimmera River Discovery Trail.
Yarriambiack Small Towns Cycle Loops Audit	YSC	Various	Nature based & Water	3	YSC	Conduct an audit of Yarriambiack Small Towns Cycle Loops (Recreational trails), identified as a priority in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan.
Lake Charlegrark Fish Nursery Attraction	WWSC	Lake Charlegrark	Nature based & Water	3	PV; WWSC; Private Sector	Investigate the potential to reopen the fish nursery at Lake Charlegrark as a tourism attraction.
Motorbike & 4WD Tour Development	WWSC	Various	Nature based & Water	3	WWSC; Private Sector	Investigate the establishment of a Motorbike and 4WD tour company operating across West Wimmera Shire.
Yarriambiack Creek Free Camping	YSC	Beulah	Nature based and water	3	YSC	Improvements to Beulah's free camping area on the Yarriambiack Creek/Luna Park.
Wyperfeld National Park – Wonga Information Hub Upgrade	YSC	Wyperfeld National Park – Wonga Campground	Nature based & Water	3	Parks Vic	Friends of Wyperfeld National Park
Pink Lake Signage Implementation	HSC	Pink Lake	Nature based & Water	3	PV; HSC, BGLC	Delivery of signage developed by Parks Victoria in conjunction with BGLC for Pink Lake
Buloke Economic Development and Tourism Board	BSC	All	Strategic Positioning, Industry Capacity Development & Tourism Governance	3	BSC	Build community capacity to facilitate economic development and tourism including through the establishment of a Buloke Economic Development and Tourism Board.

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