

Wimmera and Grampians Indigenous Tourism Feasibility Study

Wotjobaluk Country Indigenous Tourism

Final Report, February 2017

For the Wimmera Indigenous Tourism Group

Other project partners in the Wimmera Indigenous Tourism Group include:



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EXECUTIVE SUMMARY

Overview

The project explores the potential to develop Indigenous tourism enterprise activities for 'Wotjobaluk Country'¹ in the Wimmera-Mallee region. It covers the land area for which the Barengi Gadjin Land Council (BGLC) is the Registered Aboriginal Party² and takes in, all or part of, the local government areas of West Wimmera, Yarriambiack, Hindmarsh and Buloke. The Wimmera Indigenous Tourism Group (WITG) has been formed to stimulate Wotjobaluk Country tourism activity by:

- Facilitating regional capability for an increase in Indigenous tourism skills capacity and employment.
- Facilitating and building the capacity of Indigenous tourism businesses.
- Developing Indigenous international standard tourism products.
- Developing and preparing project funding applications in support of Indigenous tourism product development.
- Guiding regional policy direction for Indigenous tourism development
- Coordinating regional projects between relevant government and industry bodies.

Representation on WITG includes BGLC, Wimmera Development Association, Parks Victoria, Wimmera Catchment Management Authority, Horsham Rural City Council, and Yarriambiack, Hindmarsh and West Wimmera Shire Councils (including Council members of Wimmera Mallee Tourism). During the project, WITG members resolved to include Buloke Shire as an additional local government member.

WITG's geographic sphere of influence is consistent with the region embraced by Wimmera Mallee Tourism Incorporated.

The scope of the study includes

1. Developing and scoping costs to establish an Indigenous touring route through the Wimmera and Grampians.
2. Scoping requirements to build and sustain a viable Indigenous tour business operation for BGLC.

1. Note that the project was previously called the *Wimmera-Grampians* Indigenous Tourism Feasibility Project. However, during the project's development, the WITG determined that *Wotjobaluk Country* was a more fitting title to represent the project area and its Indigenous cultural heritage.

2. Registered Aboriginal Parties (RAPs) are organisations that hold decision-making responsibilities under the Aboriginal Heritage Act 2006 for protecting Aboriginal cultural heritage in a specified geographical area.

3. Identifying significant Indigenous cultural sites and stories across Wimmera and Grampians regions.
4. Identifying suitable linkages between Indigenous sites - transport routes, walking trails etc.
5. Identifying and scoping infrastructure investment requirements.
6. Establishing requirements for education and training pathways to deliver on the tourism experiences.
7. Recommending appropriate marketing and promotional materials to support Indigenous tourism visitation to the region.

Major Findings

Overview of Tourism Products and Markets

- Currently, Wimmera Mallee tourism ventures are relatively low-key and are linked to the natural environment, events or history; all of which have synergies with Indigenous experiences. Indeed, Wimmera Mallee region has the smallest tourism economy of all Victorian tourism regions although there has been sound growth in visitation in recent years.
- There are few Indigenous tourism experiences in the Wimmera Mallee. The existing range includes Harrow Discovery Centre and Johnny Mullagh Interpretive Centre (named after the star all-rounder of the Indigenous First XI Cricket Team who undertook Australia's first international tour of England), onsite interpretation at the Jane Duff Memorial which relates the story of two Aboriginal trackers who located children lost in the bush in the mid-19th century, and several sites with low-key Indigenous-themed interpretation.
- There are hundreds of Aboriginal cultural heritage sites across Wotjobaluk Country, many located within 500 metres of the Wimmera River.
- Market opportunities with potential to support Indigenous tourism in the project area include:
 - Proximity to the Grampians region, including Grampians National Park and Brambuk, could provide product and promotional linkages for Indigenous tourism activities in Wotjobaluk Country.

- Significant visitation to Mt Arapiles-Tooan State Park by the schools sector who stay up to 5 days per trip;
- Conservation Volunteers Australia, who manages the Little Desert Nature Lodge, and who conducts a national tours program, currently runs tours of Little Desert National Park that feature Indigenous interpretation. They are seeking to upgrade the Lodge facilities to grow visitation and yield.
- Lake Tyrrell is increasingly proving to be a tourism drawcard, particularly for the Chinese market;
- Yarriambiack Shire's Silo Art Trail should generate an increase in visitation to the region.
- During the feasibility assessment of Indigenous tourism business concepts, a Wotjobaluk Tourism tour enterprise was identified as a potential business opportunity, with the concept including a logistics base at Wail Nursery. BGLC is now co-owner of Wail Nursery and will be moving operational headquarters to this location in 2017. A range of products for different markets and locations is proposed for delivery by the tour operation, including:
 - Indigenous program at Secondary School Camps held at Mount Arapiles, including visits to the Harrow Discovery Centre and Johnny Mullagh Interpretive Centre, and Jane Duff Memorial site. This could involve working with other licensed tour operators to deliver Indigenous programs to school groups.
 - Cultural Tours and Ceremonial Experiences on Wotjobaluk Country, which are already a function of BGLC's services and can be expanded.
 - Little Desert National Park: nature-based and Indigenous cultural tours for group bookings associated with the Little Desert Nature Lodge and Conservation Volunteers Australia.
 - Lake Tyrrell Boorong Night Sky Tours, adding another dimension to the clear night skies, spectacular light and reflections on the lake, and a burgeoning Chinese visitor market interested in photographing the lake's reflections.
 - *Bunjil's Songline Tour: Grampians and Wimmera Mallee Cultural Awareness Tours* for the corporate market, including visits to Brambuk Cultural Centre and Grampians National Park. This may have potential to become a tour for leisure travellers over time, and a self-guided tour.

It is essential that an extensive cultural heritage research project is undertaken to inform the contents of these tour products.

Organisation and Operational Arrangements

- BGLC has a challenging work program ahead and tourism can be part of its portfolio. However, it is unlikely to be successful as a simple "add on" to other activities, and needs to be delivered as a discrete enterprise. Support and active involvement by WITG may contribute to a discrete enterprise focus, but not just as an advisory group.
- An appropriate suggested legal structure for Wotjobaluk Country Tourism is to be registered as a business name of BGLC in the short-term, and to incorporate as a company limited by guarantee after the enterprise has begun to trade successfully and provide evidence of sustainability.
- Staffing to service the Wotjobaluk Country Tourism enterprise could involve appointment of 4.5 to 5.4 full-time equivalent positions as tour guides, educational and cultural heritage officers, marketing and administration staff, and ceremonial presenters and dancers/performers.
- There would be a need for Wotjobaluk Country Tourism/BGLC to enact 'collaborative enterprise agreements' with the organisations which would have control of funded improvements to tourism assets which support the delivery of tour products (proposed below under 'Infrastructure Development'), to ensure responsibilities for the protection and maintenance of the assets is clear. Further, a Memorandum of Understanding should be developed and enacted with each of the local government authorities in Wotjobaluk Country (or Wimmera Development Association, as the councils' representative) and Parks Victoria, also to clarify responsibilities.
- Conservation Volunteers Australia and Little Desert Nature Lodge (LDNL) are the first two partner organisations who could have a working relationship with Wotjobaluk Country Tourism to enhance the range of skills of the organisations for mutual benefit. CVA has confirmed their interest in developing a relationship with Wotjobaluk Country Tourism in an arrangement which would enhance the skills and competitiveness of both organisations (and LDNL).

Infrastructure Development

- It is estimated that the infrastructure provision and improvements required to enable the effective implementation of the proposed Wotjobaluk Country Indigenous tourism product range would be \$1.287 million, including:
 - Tour Operations Hub at Wail Nursery \$478,274
 - Secondary School Camps at Mt Arapiles-Tooan State Park (and upgrade of Johnny Mullagh Centre) \$270,600
 - Cultural Tours and Ceremonial Experiences on Wotjobaluk Country - Little Desert National Park \$50,000
 - Bunjil's Songline Tour \$437,975
 - Wotjobaluk Country Mobile App \$50,000

It is important to note that some of the proposed infrastructure developments would service a range of visitor markets, not just Wotjobaluk Country Tourism clients.

Financial Viability

- A series of profit and loss and cash flow projections, over a time horizon of 5 years, were prepared to examine the potential viability of a Wotjobaluk Country Tourism enterprise and the circumstances under which it could be viable.
- The projections reveal:
 - Scenario 1 (Low Series): This scenario is not viable during its first five years, and would need to be subsidised or supported by an external funding body.
 - Scenario 2 (Medium Series): The venture is viable in this scenario, with net surpluses projected from Year 2 and beyond, and net profit after Year 3. However, the level of activity and sales of tourism services in this scenario are considered ambitious and at the 'best practice' end of performance for an Indigenous tourism enterprise in Victoria. In practice, the achievement of this scenario is unlikely with the existing tourism market and complementary product availability in the Wimmera Mallee.

- Scenario 3 High Series): The venture is viable at the projected level of demand in this scenario, with net surpluses projected from the fourth quarter of Year 1 and beyond, and net profit after Year 2. The level of activity and sales of tourism services in this scenario is considered both highly ambitious and without precedent for Indigenous tourism enterprises in Victoria.
- None of the scenarios include provision for commercial finance loans and, therefore, no costs of finance (ie interest charges or repayment of capital) are included.
- Overall, the proposed tourism enterprise is not considered to be financially feasible at present, and would need to be implemented in stages and with financial support that does not require a commercial return on investment.

Next Steps

If BGLC decides to *work towards* operating a sustainable touring business (rather than commit to a full-scale venture), it is recommended that they work with the WITG / Wimmera Mallee Tourism to develop an implementation plan that will guide their initial steps. These could include:

- Proceeding to establish a partnership with Conservation Volunteers Australia / Little Desert Nature Lodge, who have expressed interest in developing a co-operative arrangement with BGLC;
- Seeking funds to undertake a cultural heritage research project to inform all future interpretation and tourism product development initiatives;
- Commencing Certificate 3 training in Tourism (tailored to BGLC's specific requirements) for interested members of BGLC staff and community members;
- Exploring opportunities associated with delivering Indigenous experiences to school groups at Mount Arapiles-Tooan State Park, including devising suitable activities and promoting the opportunity to selected schools.



1. INTRODUCTION

1.1 Background to the project

- Wimmera Indigenous Tourism Group
- Scope of the study
- Strategic context

1.2 Project area

1.3 Methodology

- Key steps
- Consultation

1.1 Background to the project

Wimmera Indigenous Tourism Group

The Wimmera Indigenous Tourism Group (WITG) comprises representation from:

- Barengi Gadjin Land Council
- Wimmera Development Association
- Parks Victoria
- Wimmera Catchment Management Authority
- Local government authorities of Horsham Rural City, Yarriambiack Shire, Hindmarsh Shire and West Wimmera Shire (including Council members of Wimmera Mallee Tourism).

The key objectives of the WITG include:

- Facilitating regional capability to support an increase in Indigenous tourism skills capacity and employment;
- Facilitating and building the capacity of Indigenous tourism businesses;
- Developing Indigenous international standard tourism product offerings;
- Developing and preparing project funding applications in support of Indigenous tourism product development;
- Guiding regional policy direction for Indigenous tourism development; and
- Coordinating regional projects between relevant government and industry bodies.

The WITG initiated the Wotjobaluk Country Indigenous Tourism Feasibility Study as a major step towards bringing these objectives to fruition.

Note that the project was previously called the *Wimmera-Grampians Indigenous Tourism Feasibility Study*. However, during the course of the project, the WITG determined that the *Wotjobaluk Country* title was more fitting in its representation of the project area and its Indigenous cultural heritage.

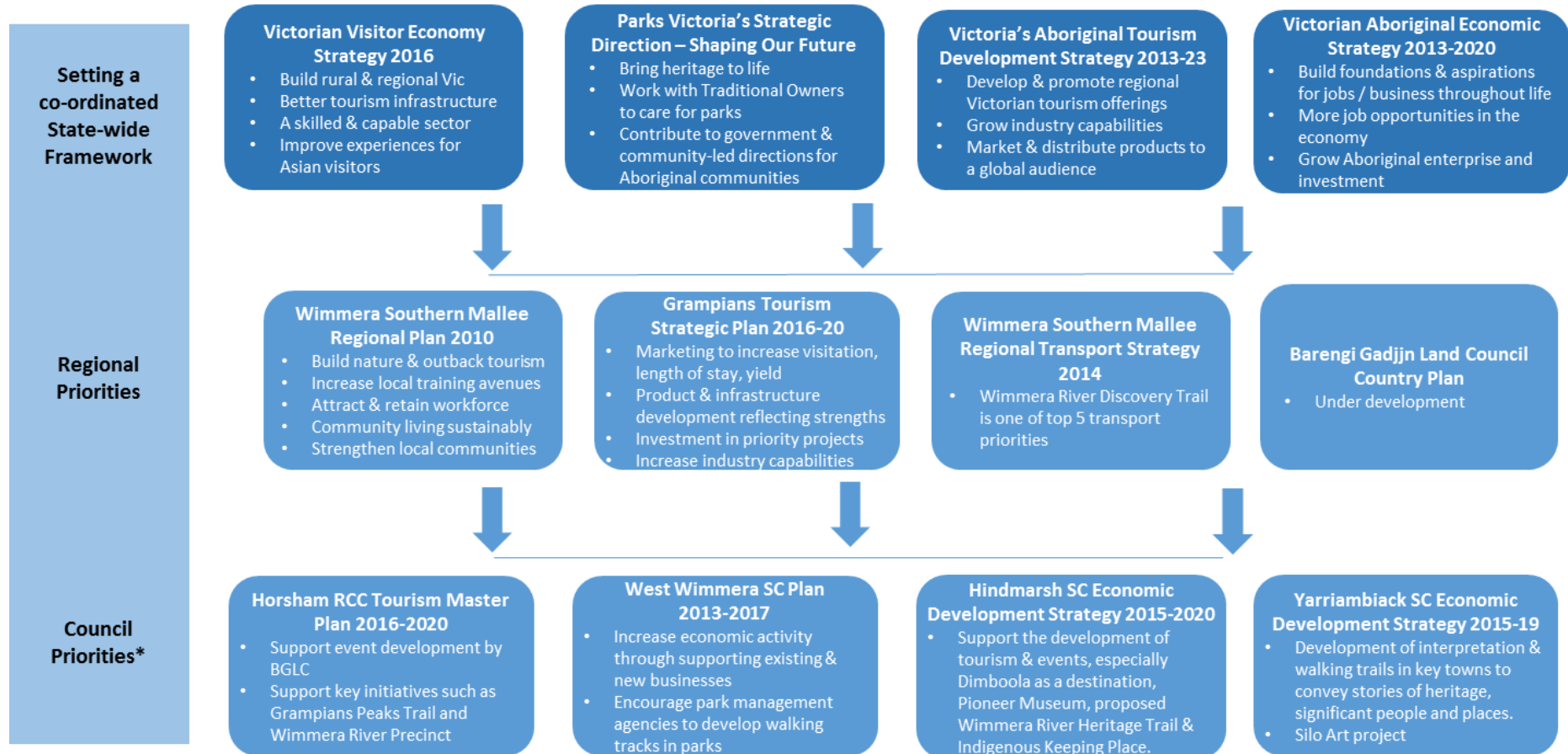
Scope of the study

As outlined in the project brief, the scope of the study includes:

1. Develop and scope costs to establish an Indigenous touring route through the Wimmera Mallee and Grampians referencing all assets but leveraging off the expected visitation of Grampians Peaks Trail to bring tourists to Horsham and beyond.
2. Scope requirements to build and sustain a viable Indigenous tour business operation for Barengi Gadjin Land Council (BGLC represents Traditional Owners from the Wotjobaluk, Jaadwa, Jadawadjali, Wergaia and Jupagulk family groups).
3. Identify entire significant Indigenous cultural sites across Wimmera Mallee and Grampians regions together with research and interpretive information - record and transcribe stories.
4. Identify suitable linkages between Indigenous sites - transport routes, walking trails etc.
5. Identify and scope infrastructure investment requirements - initially this may be picnic spots but could lead to camping sites, B&B, other accommodation.
6. Establish requirements for education and training pathways for tourism and small business and business plan training to Barengi Gadjin members and Indigenous people from across the Wimmera Mallee and Grampians region.
7. Recommend appropriate Indigenous tourism marketing and promotional material specifically for the Indigenous experience of the Wimmera Mallee and Grampians.

Strategic Context

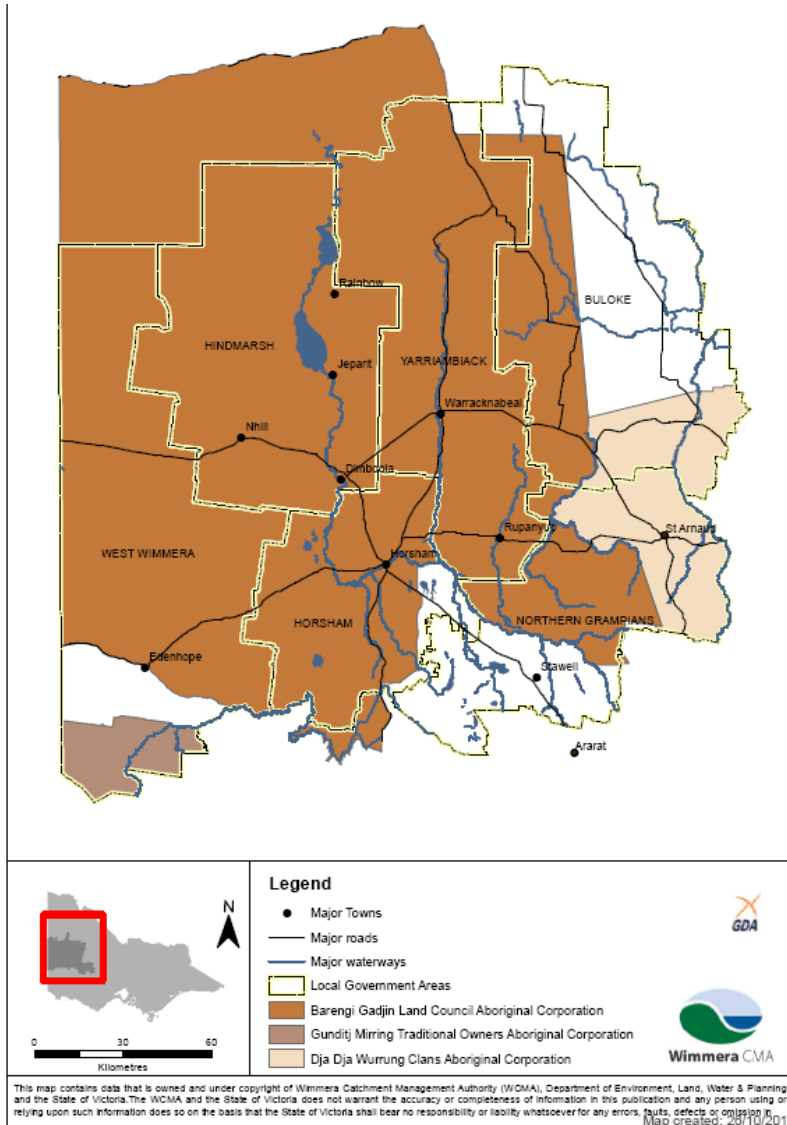
The table below depicts the various planning initiatives that provide the strategic context for the Wotjobaluk Country Indigenous Tourism Feasibility Study.



* Note that some strategic initiatives require consultation / approval from other agencies before implementation can proceed.

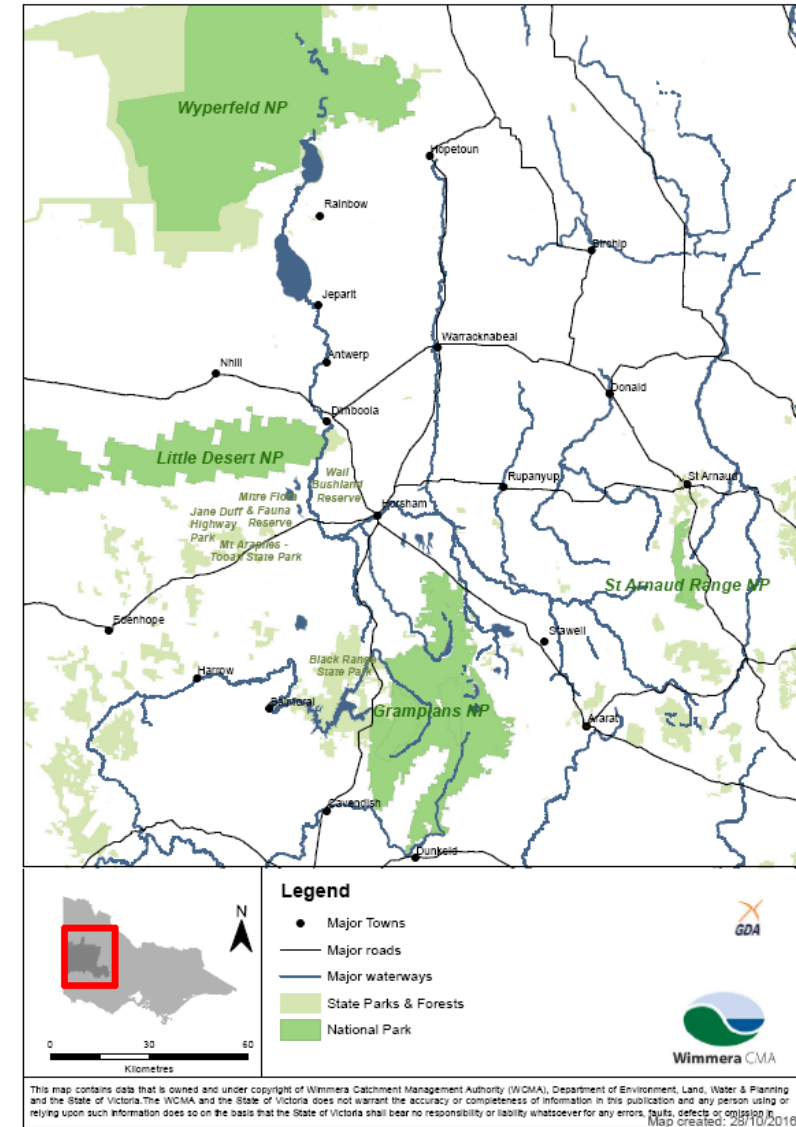
1.2 Project Area

The project area (referred to as Wotjobaluk Country) is focused on the Wimmera-Mallee region and includes the Native Title Area of Barengi Gadjin Land Council and the local government areas of West Wimmera, Horsham Rural City, Yarriambiack, Hindmarsh and Buloke.



Source: Wimmera CMA

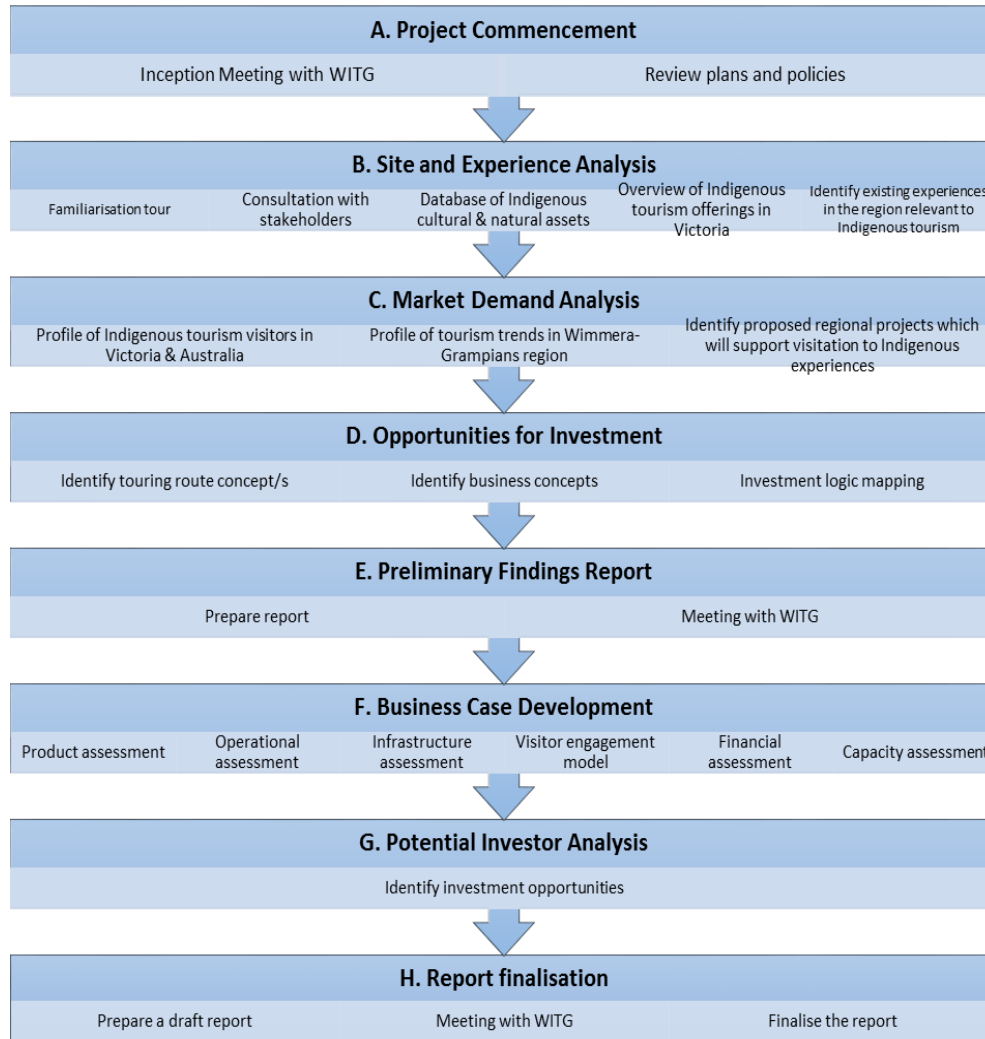
The concept map below depicts the project area's major towns, nature-based assets and arterial roads, and its proximity to Grampians National Park. It is provided as a reference tool for the geographic locations referred to throughout the document.



Source: Wimmera CMA

1.3 Methodology

Key Steps



Consultation

Stakeholder consultation for the project included:

Organisation	Name	
Barengi Gadjin Land Council	1. Michael Stewart	
	2. Ron Marks	
Conservation Volunteers Australia / Little Desert Nature Lodge	3. Jo Issaverdis	
	4. Ian Walker	
	5. Rodney & Jade	
Grampians Tourism	6. Will Flamsteed	
Hindmarsh SC	7. Jeff Woodward	
	8. Katherine Colbert	
Horsham RCC	9. Matthew Gould	12. Melissa Morris
	10. Adam Harding	13. Kevin O'Brien
	11. Jillian Pearce	
Parks Victoria	14. Zoe Wilkinson	17. David Lucas
	15. David Roberts	18. Crystal
	16. Alysia Brandenburg	19. Justin Vaughan
Regional Development Victoria	20. Jane Osborn	
	21. Larry Karoa	
West Wimmera SC	22. Heidi Gajic	
Wimmera CMA	23. Joel Boyd	
	24. Tracey Rigney	
	25. Ben Muir	
Wimmera Development Association	26. Ralph Kenyon	
	27. Tammy McDonald	
Wimmera Mallee Tourism	28. Members of the WITG	
Yarriambiack SC	29. Marianne Ferguson	
	30. Murray McKenzie	

2. REGIONAL SITES & EXPERIENCE ANALYSIS

2.1 Indigenous cultural sites in the project area

- Current indigenous tourism offerings
- Cultural and natural sites register

2.2 Overview of Indigenous tourism experiences in Victoria

2.1 Indigenous Cultural Sites in the Project Area

Current Indigenous tourism offerings

There are currently very few Indigenous tourism experiences accessible to visitors to the project area, including locations with on-site interpretation. Following is a brief summary:

Experience	LGA
1. Johnny Mullagh Cricket Centre, Harrow	West Wimmera
2. Jane Duff Memorial, near Mount Arapiles	West Wimmera
3. Memorial Weekend at Jane Duff Memorial, involving a horse ride and commemorative activities (annual)	West Wimmera
4. Aboriginal Cricket Trail – self-drive route including Edenhope, Harrow, Apsley and other locations	West Wimmera
5. Yanga Track – 3-4km walking track along the Wimmera River in/near Horsham, managed as a ‘garden’ of Indigenous food, medicine and tools reflecting the river’s cultural significance for Wotjobaluk families.	Horsham Rural City
6. Silo Art Trail. The Sheep Hills silos feature members of the local Indigenous community (currently under development)	Yarriambiack

With the exception of the Johnny Mullagh Cricket Centre, the majority of visitation to these attractions is by residents within the region rather than ‘tourists’. The Jane Duff Memorial also attracts some visitation from school students from outside the region who are visiting Mount Arapiles.

Given the number of Indigenous cultural sites and stories available in the project area, there is considerable opportunity to create further opportunities for visitors to experience Indigenous cultures and heritage.

It should also be noted that Brambuk: The National Park and Cultural Centre, a significant Victorian Indigenous attraction, is located one hour’s drive from Horsham in Halls Gap. It attracts cultural and nature-based visitors interested in Indigenous culture to the Grampians region and is a potential springboard for visitation to Wotjobaluk Country. It also provides a product offering that could complement Indigenous experiences in Wotjobaluk Country.

Cultural and natural sites register

A series of sites in the project area with significant Indigenous cultural heritage and stories have been identified. These sites are generally those that are the most well-known, some of which are already incorporated into tours and activities presented by BGLC for school groups and local events.

These sites have been recorded in a Cultural and Natural Sites Register (*available in an excel spreadsheet*) which is a starting point for the collation of potential sites for Indigenous tourism activity in the project area. Many of the sites are connected through creation stories, traditional uses and cultural practices.

Where possible, the database comments on the following features of a cultural site – accessibility, signage, infrastructure, Indigenous cultural values, natural values, other cultural and non-Indigenous heritage values, and outdoor activities that are undertaken at the site.

There are many more cultural heritage sites in the region than are currently listed in the register. The feasibility study for the Wimmera River Discovery Trail states that there are 329 sites of cultural heritage significance on the eastern side of the Wimmera River, Lakes Hindmarsh and Albacutya, and 173 sites identified on the west side. River systems are typically the ‘spine’ of Aboriginal cultural heritage sites being an important source of food, medicine and the site of cultural practices. Given that there are other water courses in the project area, it is likely that there is an extensive number of cultural heritage sites across the whole project area.

It is recommended that an Indigenous cultural heritage research project be undertaken to support the business opportunities selected in this report, as well as to inform other Indigenous cultural activities and experiences that take place in the region. Many sites have already been documented by Aboriginal Victoria.

2.2 Overview of Indigenous tourism experiences in Victoria

Victoria currently has ten Indigenous tourism products available to both domestic and international visitors. Tourism Australia's Indigenous Tourism Champions Program includes four Victorian experiences, namely the Aboriginal Heritage Walk @ Royal Botanic Gardens Melbourne, tours at Brambuk: the National Park and Cultural Centre, tours at Worn Gundidj @ Tower Hill and Harry Nanya Tours. To be a participant in the program, the product must provide an experience of international standard, be revenue raising, and commissionable for the international travel trade. Tourism Australia has identified Indigenous tourism experiences as key international tourism drivers.

Victoria's Aboriginal Tourism Development Strategy 2013–2023 identifies that consumer demand for Aboriginal experiences is significant amongst international markets, particularly Western Hemisphere markets such as the United Kingdom and Europe. The strategy states that Aboriginal tourism is seen as a motivator for travel to Australia for visitors. Recent research in the domestic market indicates that consumers' knowledge of Aboriginal tourism is limited. However they are also seeking experiences that are positive and which highlight unique aspects of Indigenous cultures. To grow Aboriginal tourism in Victoria, the Strategy will focus on identifying compelling experiences and building the capacity of the industry to deliver these experiences – both as stand-alone products or as integral components within the broader tourism industry.

Six of the ten Victorian Aboriginal experiences are focused on traditional heritage and culture, with the others including Bunjilaka, some of the Budj Bim Tour experiences, Johnny Mullagh Cricket Centre and Burrinja including more contemporary, post-European settlement stories. Koori Heritage Trust also has temporary exhibitions which can focus on contemporary cultural themes.

More than half of the Indigenous tourism products have been established for at least twenty years. There have not been any new experiences

introduced since 2010. Of the ten products, one is operated privately by an Indigenous owner, with the remaining nine operated by either community groups (Indigenous and non-Indigenous), Aboriginal trusts, co-operatives or corporations, or a statutory authority.

Most products require tour bookings in advance which can be determined by seasons, days of the week and some require minimum group numbers to operate. Visitors can search for availability and book online – either via a live booking system or email requests for both individual and group bookings.

See Appendix B for an overview of Victoria's Aboriginal tourism products.

3. MARKET DEMAND ANALYSIS

3.1 The tourism region

3.2 Level and value of regional visitation

3.3 Profile of Indigenous tourism

3.4 Nature-based tourism

3.5 Regional target markets

3.6 Conclusions

3.1 The Tourism Region

Visits to Barengi Gadjin Land Council (BGLC) Native Title Area within the Wimmera Mallee region will be directly influenced by visitation levels in the broader Grampians tourism region. This region has three tourism sub-regions for which regional tourism statistics are maintained: Western Grampians, Wimmera Mallee and Central Highlands. The BGLC Native Title Area incorporates local government areas in both the Western Grampians and Wimmera Mallee sub-regions.

Regional definitions are complicated by the choice of differing regional boundaries for the monitoring of tourism data and marketing of tourism. The area of focus for the Wimmera Indigenous Tourism Group is part of two Tourism Research Australia (TRA) regions and two tourism marketing regions.

The TRA regions are:

- Western Grampians encompassing the Statistical Areas (SA2s) of Hamilton, Horsham, Horsham Region, Southern Grampians, and West Wimmera.
- Wimmera encompassing the SA2s of Buloke, Nhill Region, and Yarriambiack.

The two tourism regions are:

- Grampians, which includes the local government areas Horsham, Southern Grampians, Northern Grampians and Ararat.
- Wimmera-Mallee, which includes the local government areas Buloke, Hindmarsh, West Wimmera, and Yarriambiack.

The lack of a clear fit between the WITG region and established tourism regions means that tourism data is incomplete.

Wimmera Mallee tourism ventures are relatively low-key and are linked to the natural environment, events or history; all of which have synergies with Indigenous experiences. The Wimmera region has the smallest tourism visitation and tourism economy of all Victorian tourism regions, and (depending on the year in review) typically ranks 73 of 76 across Australia.

So the creation of viable Indigenous tourism ventures requires the expansion of tourism industry activity more broadly.

Conversely, the Grampians tourism region is well established and its focal point, the Grampians National Park, is recognised as one of Victoria's iconic tourist destinations to experience natural and cultural heritage. This region's tourism product strengths include:

- 'Hard and soft' outdoor adventure, scenic touring, events, and wildlife viewing in a wide range of natural environments and landscapes.
- Indigenous heritage and culture
- Food and wine – with a focus on producers, farm gate experiences, cellar doors, interactive food experiences, restaurants and cafes
- Touring – self drive
- Arts, culture and history, such as pastoral and gold heritage, galleries, events, work of local artists, homesteads and gardens.

Key product focus areas for Grampians Tourism (in its 2012-16 Strategy Plan) are the new Grampians Peaks Trail, Grampians Way, Indigenous tourism, cycle tourism, Mount Arapiles visitor facilities, heritage tourism, and transport services.

Indigenous tourism, especially linked to Brambuk: the National Park and Cultural Centre, has been an important component of visitation to the Grampians National Park for some time. Although the Grampians (or Gariwerd) is part of the traditional lands of the Djab Wurrung and Jardwadjali peoples, there are linkages and common stories and songlines with Barengi Gadjin communities.

3.2 Level and Value of Regional Visitation

In the 2015 calendar year, the Wimmera region attracted 143,000 overnight domestic visitors staying 377,000 nights at an average 2.64 nights per overnight visitor. These visitors had an average spend per trip of \$287 and \$109 per night. The Western Grampians region recorded 309,000 overnight domestic and 9,000 international visitors in the 2015 calendar year¹ (and 594,000 day-trip visitors) staying 872,000 nights at an average of 2.82 nights. Average expenditures by Western Grampians overnight domestic visitors was \$299 per trip and \$106 per night. Average expenditures in both regions reflect the relatively high ratio of caravan and camping accommodation, compared with hotel, motel and apartment accommodation.

The main purpose of overnight trips to the Western Grampians region was:

- Visiting friends and relatives: 33.7%
- Holiday/vacation: 29.4%
- Business and other: 36.9%.

The chart below shows that, although there can be fluctuations due to climatic and economic events, the tourism expenditure in both the Wimmera and Western Grampians regions has been growing at impressive rates over the past 5 years; Wimmera region tourism expenditure has grown at 12% per annum between 2009-10 and 2014-15, Western Grampians at 8% per annum, and the combined regions at 9% per annum. All of this rates of growth are well in excess of both inflation and general Victorian economic growth.

¹ Tourism Research Australia provides some of its data in calendar years and some in financial years, which has led to some differences in the text quoted in this section and the figures in the graphs and tables.

Figure 3.1: Tourism Expenditure in the Region 2009-10 to 2014-15

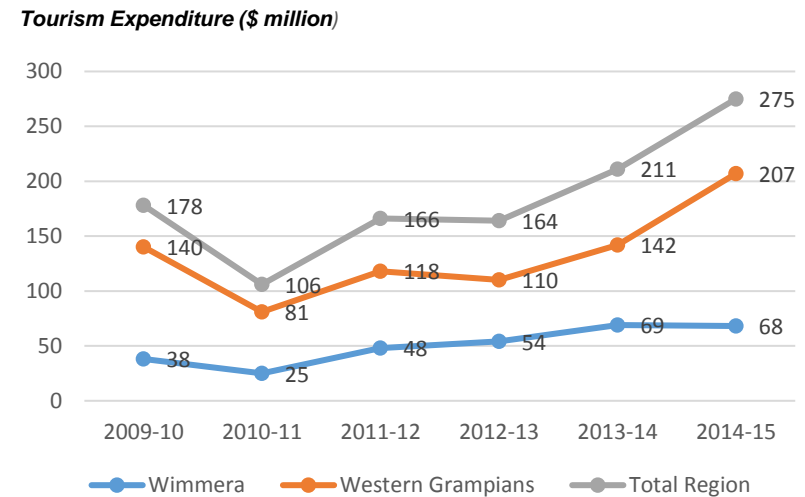


Table 3.1 below reveals that the growth in domestic and international overnight visitations has been consistent with the tourism expenditure trends during 2009-10 to 2014-15 (Figure 1). The overall rate of growth in overnight visitors was 6% per annum, which is approximately the same as growth in tourism expenditure once an allowance (of about 3%) is made for average inflation.

Table 3.1: Overnight visitor trends

Tourism overnight visitors ('000)	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	% change per annum
Wimmera	107	99	132	143	125	160	8.38%
Western Grampians	242	268	232	304	332	309	5.01%
Total Region	349	367	364	447	457	469	6.09%

SOURCE: Tourism Research Australia Regional Profiles

Tourism performance in both the Wimmera and Western Grampians tourism can be impacted by actual and perceived dangers from bushfires, floods and droughts. The most recent major bushfire event in the Grampians was in 2013, there have been flood waters in the region in 2010, 2011 and 2016, and there was a near decade of drought conditions during 2002 to 2010.

Table 3.2 summarises 2015-16 visitation to Parks Victoria-managed caravan and camping grounds in four parks within the wider Grampians and Wimmera region. It shows that the Grampians National Park dominates this sector of tourism, with 68% of overnight visitors, while Mount Arapiles-Tooan State Park had 24% of visitors and, due to a much longer average length of stay, 39% of visit nights. The state park has the highest level of visitation of all parks in the actual project area. The higher level of caravan and camping stays in the Grampians National Park is both a reflection of the greater recognition of the Grampians as a destination and the considerably greater range of camping and caravan options, with 7 separate camping areas in the Park.

Table 3.2: Parks Victoria-managed Caravan and Camping Ground Bookings 2015-16

PARKS	Visitors	Visit Nights	Average number of nights	Revenue from site fees
Grampians National Park	13,262	22,223	1.68	\$236,398
Mount Arapiles - Tooan State Park	4,709	15,915	3.38	\$78,431
Wyperfeld National Park	531	1,159	2.18	\$11,495
Little Desert National Park	984	1,788	1.82	\$19,313
All Parks	19,486	41,086	2.11	\$345,637

SOURCE: Parks Victoria, 2016

The relative dominance of the Western Grampians compared with the Wimmera is even more pronounced with overnight visitation at hotel, motel and apartment accommodation¹. 82% of hotel, motel and apartment accommodation is located in the Western Grampians with an average occupancy rate of 50% compared to 32% average occupancy for the Wimmera area. Furthermore, hotel, motel and apartment accommodation in the Western Grampians makes up 94.4% of the total.

The new Grampians Peaks Trail in Grampians National Park is expected to generate an additional 86,000 visitor nights per annum when it is completed (nearly four times the park’s current visitor nights). It will include a 13 day/ 12 night walking experience along the spine of the Grampians mountain range. The first section has been completed – a 3 days/ 2 nights walking circuit ex-Halls Gap, with Stage 2 underway.

It should also be noted that Brambuk: the National Park and Cultural Centre within Grampians National Park receives approximately 130,000-150,000 visitors per annum, making it the largest built attraction in the wider Grampians and Wimmera region.

3.3 Profile of Indigenous Tourism

Visitation Trends

Visit Victoria’s Aboriginal Tourism Market Profile (2014) defines Aboriginal tourism participants as visitors who:

- Experience Aboriginal art, craft or cultural displays,
- Visit an Aboriginal site or community and/or
- Attend an Aboriginal performance while on their trip to Australia.

In 2013-14 there were 671,000 international overnight Aboriginal tourism visitors in Australia, of whom 43% visited Victoria. There were 290,000 Aboriginal tourism visitors to Victoria in 2013-14, staying 7.45 million nights (although it is not known how many of these visitors participated in an Aboriginal tourism activity in Victoria). However, the number of International Aboriginal tourism visitors to Australia declined by an average of 3.3% per annum over the last 6 years, and by 2.4% per annum in Victoria, from 2008 to 2014. Victoria achieved a small average annual growth in international visit nights by international Aboriginal tourism visitors (1.8% per annum).

Table 3.3: International and Domestic Aboriginal Tourism Visitors year ending June 2014

	Year ending June			Average Annual Growth 08-14 (%)	% Change 13/14
	2008	2013	2014		
International Visitors (000s)					
Victoria	335	294	290	-2.38%	-1.36%
Australia	818	705	671	-3.25%	-4.82%
Victorian Share*	41.0%	41.60%	43.10%		
International Visitor Nights (000s)					
Victoria	6,705	8,082	7,451	1.77%	-7.81%
Australia	40,064	44,149	39,904	-0.07%	-9.62%
Victorian Share	16.7%	18.30%	18.70%		
Domestic Visitors (000s)					
Victoria	61	66	72	2.80%	9.09%
Australia	546	444	499	-1.49%	12.39%
Domestic Visitor Nights (000s)					
Australia	5,077	3,181	3,471	-6.14%	9.12%

*Note: The proportion of visitors to/within Australia who visited Victoria. Visitors frequently visit more than one state.

SOURCE: Visit Victoria

The domestic tourism market is showing healthier signs for Aboriginal tourism activity in Victoria with an average 2.8% per annum visitor growth for the last 6 years, and a 9.1% increase in 2013-14 compared to the previous year. Intrastate visitors, in particular, have been the main domestic market for the Aboriginal segment accounting for 83% of total domestic overnight visitors to and within Victoria. 54% of intrastate visitors were from the Melbourne metropolitan area.

The largest single origin market for international overnight Aboriginal tourism visitors to Victoria in 2013-14 was the United Kingdom with 47,500 visitors (or 16%), followed by China with 40,400 visitors (or 14%).

Preferred Aboriginal Tourism Activities and Experiences

Activities and learning experiences and their participation rates by Aboriginal tourism visitors in 2010 are summarised in Table 3.4. The table shows a greater level of participation by domestic Aboriginal tourists in Aboriginal art, craft or cultural displays and in learning experiences associated with art/craft, hunting and gathering and bush tucker than international Aboriginal visitors. However, international Aboriginal visitors show greater or similar levels of participation on all other activities and learning experiences and a greater breadth of participation across the board, particularly with activities

Taking an Aboriginal tour has very low levels of participation amongst domestic and international Aboriginal tourists (7.4% and 8% respectively). However, seeing an Aboriginal site or community (which could be part of an Aboriginal tour itinerary) has a higher level of participation at 27% of domestic and 20% of international Aboriginal visitors.

A research assessment, *Selling Indigenous Tourism Experiences to the Domestic Market, 2010* by the Department of Resources, Energy and Tourism (DRET), suggests the domestic markets with the most potential to engage in Aboriginal tourism experiences are:

- Older Australians (with children no longer living at home), and
- Families with older children who are more likely to find Indigenous experiences appealing as they are more interested in learning.

The DRET assessment also indicated that most Australians are familiar with Aboriginal tourism experiences such as boomerang throwing or watching a corroboree, and are seeking new and different experiences when on holiday. Some people are concerned that these experiences will be designed for the international tourist market and be clichéd and lack authenticity.

Table 3.4 Activities and Learning Experiences by Aboriginal Tourism Visitors, 2010

	% of International Aboriginal Tourism Visitors Participating	% of Domestic Aboriginal Tourism Visitors Participating
ACTIVITIES UNDERTAKEN		
See Aboriginal art, craft or cultural display	41	51
Visit an Aboriginal gallery	34	29
Visit an Aboriginal cultural centre	29	24
Attend an Aboriginal dance or theatre performance	26	9
Purchase Aboriginal art/craft or souvenirs	24	8
See an Aboriginal site or community	20	27
Some other interaction with Aboriginal people	17	19
Go on a tour with an Aboriginal guide	8	7
Attend an Aboriginal festival	2.9	np*
Stay in Aboriginal accommodation	1.6	4
LEARNING EXPERIENCES		
Art/craft	59	64
Music	51	34
Weapons	44	31
Rock art/carvings	36	37
Hunting and gathering	29	39
Dancing/performance	29	21
Dreamtime	28	38
Bush tucker	24	34

Source: TRA, Snapshots 2011¹, Aboriginal Tourism Visitors in Australia

Appealing and well-supported Aboriginal tourism experiences are those that portray the Indigenous cultural element as an addition to an already appealing experience, for example:

- A professionally run fishing trip is fun and relaxing, but with an Indigenous guide who has local expertise it becomes even more attractive;
- A stay at a quality eco-tourism facility can be more appealing with the offering of cultural dinners or interpretive tours;
- A knowledgeable Indigenous guide can add value to a tour which include landmarks and destinations people wish to visit;
- People like to learn and ‘get their hands dirty’ so operators should highlight both informative and hands on elements of the experience.

Domestic tourists on holiday are primarily seeking an opportunity for fun and relaxation. Aboriginal tourism experiences that meet this need for Australian holidaymakers are likely to have much higher visitation levels. Cultural heritage content can be included as a part of the experience but within this context.

Aboriginal tourism product is relatively unknown and certainly not anticipated as a primary motivation for tourism experiences in regional Victoria, despite there being established product in certain areas. However, there is undoubtedly an increasing awareness of Indigenous cultural heritage in mainstream society and a distinct interest in understanding more about local Aboriginal cultures. Tourism experiences are one means by which people can access information about Aboriginal Australia within a recreational context.

Typically, the market expectation of Aboriginal tours involves a certain level of engagement with Aboriginal people, an experience that is authentic and unique from other tourism offers in the area and preferably one that provides some interactive elements associated with Aboriginal culture (e.g cooking Indigenous foods, fashioning hunting implements, demonstrating art work, and understanding traditional medicines). Many Aboriginal tourism experiences in other parts of Australia are based around iconic landscapes and features such as Uluru and Kata Tjuta in Central Australia, Kakadu and Nitmiluk in the Top End, the Bungle Bungles in the Kimberley, and Atherton Tablelands in Far North Queensland. To some extent, the marketing (and the appeal) of these sites is the close link to Aboriginal culture (indeed some are located on land subject to inalienable Indigenous land title) and they provide an ideal platform to learn the Indigenous people’s stories.

3.4 Nature-based tourism

Aboriginal tourism is often inextricably intertwined in nature-based tourism given the central role of the natural environment in Aboriginal culture.

The “Inquiry into Heritage and Ecotourism in Victoria” released in September 2014 by the Environment and Natural Resource Committee which was commissioned by the Victorian Government, states that there is significant potential to further develop engaging tourism experiences that capitalise on Victoria’s magnificent natural and heritage assets. An outtake of the hearing was the importance of nature-based tourism to regional economies as “they immerse themselves in culture and nature, they expect a higher level of services and products than we currently offer, they are stronger with internationals and they take longer trips and spend more in regional Victoria....the nature based tourist is one who is interested in tourism products that combine both natural and cultural heritage, and physical activity with interpretation or education” (Committee Report, p.13).

3.5 Regional Target Markets

The **domestic market segment** targeted by the Grampians region includes *Lifestyle Leaders*, the market pursued by Visit Victoria for the state. This market can best be described as people who are progressive, curious, socially and technologically active through a broad range of platforms, adhere to and seek status, and follow and propagate trends. They are forward thinking, interested in discovering new experiences through travel, and are more likely to share those experiences with and seek to influence, their family and friends. They are higher in affluence and discretionary expenditure, and they can afford to indulge more often than the average Australian.

The 2013 Market Profile for the Grampians Region indicates that *Lifestyle Leaders* accounted for 32% of overnight domestic visitors travelling for leisure purposes, and 26% of these were more likely to be the sub-segment, *Inspired By Nature*, compared to the regional Victorian average (19%). The Grampians, as the neighbouring region, is an obvious potential source market for visitation to Wotjobaluk Country if effective marketing and product development strategies can be implemented to encourage visitors to travel further (if venturing from Melbourne) to the Wimmera-Mallee region.

The **international market segment** targeted by the Grampians region is the Experience Seeker, who are characterised as experienced travellers that seek out and enjoy authentic personal experiences they can talk about, enjoy engaging with the locals, are somewhat adventurous and enjoy a variety of experiences on their trips. They typically come from households that have higher than average household income, are tertiary educated, and are interested in learning new things. These characteristics show a strong alignment with Aboriginal tourism experiences.

International growth markets for the Grampians region include China, India, Korea, as well as continued visitation by longer-term markets, such as Singapore, UK, North America and Germany. While distance from capital cities is a major challenge for the Wimmera-Mallee and many other regional Victorian destinations, the Grampians region continues to show significant growth in international visitation. Lake Tyrrell is also bucking the trend with rapidly growing Chinese visitation.

Major attractions in the Wimmera-Mallee and adjacent Grampians region which already draw significant visitation, and which could potentially support Indigenous tourism enterprises in the project area, include:

Attraction	Annual Visitation estimates
Lake Tyrrell	42,000 daytrip / overnight visitors
Mount Arapiles-Tooan State Park	5,415 overnight visitors
Grampians National Park	Over 1 million site visits
Brambuk Cultural Centre	130,000-150,000 visitors

As noted earlier, the Grampians Peaks Trail is also mooted to be a major visitor attraction in years to come.

3.6 Conclusions

Following are conclusions of the market demand research:

- While visitation to the Wimmera Mallee area (as defined by the shires of Buloke, Yarriambiack, and part of Hindmarsh) is one of the lowest in Australia, along with the Western Grampians visitation has been growing strongly in recent years.
- Lake Tyrrell is increasingly proving to be a tourism drawcard, and the Art Silo Trail should also see an increase in visitation to Yarriambiack Shire.
- Proximity to the Grampians region, including Grampians National Park and Brambuk, could also provide product and marketing linkages that support Indigenous tourism enterprises in Wotjobaluk Country.
- While international Aboriginal tourism visitation has declined slightly in recent years, domestic markets are more buoyant and show no signs of losing interest.
- To maximise their appeal to domestic leisure markets, Aboriginal tourism experiences should incorporate other popular activities such as outdoor adventure, visiting natural attractions and wildlife.
- They should be authentic and original to place which will ensure they are distinctive and are more likely to provide memorable, satisfying experiences.
- Nature-based tourism and cultural / heritage tourism are complementary and appeal to similar markets. Interest is increasing in experiences that are based in the natural world.
- Target markets for the Grampians region are an excellent fit for encouraging visitation to Indigenous tourism activities. The challenge for Wotjobaluk Country is to effectively leverage visitation from the Grampians and draw visitors from Melbourne further north west, or encourage them to stop and stay if visiting from Adelaide.

4 PRODUCT OPPORTUNITIES

4.1 Business ideas and supporting projects

4.2 Success factors for Indigenous tourism development

4.3 Longer-Term Approach to the Development of Indigenous Tourism in
Wotjobaluk Country

4.4 Selected Business Concepts

4.5 Product Descriptions

4.1 Business Ideas and Supporting Projects

Business Ideas

An important part of the project scope is to identify opportunities to create a viable tourism business operation for Barengi Gadjin Land Council (BGLC).

The following business ideas were identified through suggestions by stakeholders consulted during the project, proposed projects supported in the region but not yet implemented, and other ideas informed by research.

Name	Location	Description
1. Tour guiding and ceremonial services	Various	Cultural and nature-based guided interpretation provided at different locations for different markets, eg. schools, adult groups, festivals, etc. Potentially includes tours about songlines (what are they, how used, how they are central to Indigenous cultures), bush tucker, traditional use of land, managing land and culture, kinship, ceremony, dance, highlight differences and similarities with Indigenous cultures across Australia, etc.
2. Secondary school camps at Mount Arapiles	Various, especially Mt Arapiles	4-5 night camps that include Indigenous cultural experiences through dance and story-telling, bush tucker tours, etc. Includes trips to the Jane Duff Memorial and Johnny Mullagh Cricket Centre.
3. Tours along Bunjil's Songline	Following the Wimmera River Discovery Trail	Small group tours (20 people) for independent travellers, and/or cultural awareness programs for corporate market following a portion of Bunjil's Songline along the Wimmera River Discovery Trail linking with Brambuk Cultural Centre and the Grampians National Park.
4. Business services in sectors such as agriculture, hospitality, accommodation	Various	Various – not necessarily Indigenous themed, could be mainstream businesses
5. Wimmera Mallee Cultural Centre	Dimboola	Cultural education centre that houses key Indigenous artefacts, provides educational programs and tours, and includes a gallery, museum and performance space.
6. Hunting tours	Various	eg. deer, other pests (part of a land management program)
7. Wyperfeld National Park- Artists in Residence	Near Yaapeet	Wonga Camp Ground – establish an arts centre focused on aboriginal art with artists in residence
8. Indigenous arts programs, eg. artists in schools	Various	Various
9. Little Desert Nature Lodge – tour guiding services	Near Nhill	Cultural and nature tours for Conservation Volunteers Australia staying in Little Desert Nature Lodge at Little Desert National Park catering for a range of international and domestic visitor markets.

Name	Location	Description
10. Little Desert Discovery Walk	Little Desert National Park	A supported walking business along the Little Desert Discovery Walk (85km) providing guided interpretation, catering such as bush tucker and evening meals for walking groups. There are 2 overnight hike-in only camps (yellow gums and mallee walkers camps) which can easily be supplied via 4WD access and short walk in. Include trail head upgrades at Little Desert Lodge and / or Wail Nursery.
11. Wimmera River Discovery Trail - outdoor adventure businesses supporting the trail	Various	Could include mountain bike hire and guided tours, multi-night camping trips, catering. A feasibility study for the trail has been prepared.
12. Artist-in-residence at Glen Murcutt-designed house along Wimmera River Discovery Trail	Horsham	Guided tours along Yanga Track starting / finishing at arts residence, which could provide refreshments, opportunities to view / buy art / watch artists at work.
13. Bush foods commercial production at Wail Nursery	Various	Produce bushfoods at Wail Nursery for commercial sale, eg. yam daisies, qandong. BGLC has 50% ownership of the business for the next 3 years, moving to 100% ownership in 4 years' time (the premises are leased from the State Government with negotiations underway for renewal).
14. Wail Nursery Bush Foods Café and retail outlet	Wail, near Horsham	Develop a café in addition to existing wholesale nursery facilities.
15. Bootong Night Sky tours at Lake Tyrrell	Lake Tyrrell	Guided night tours of the lake for Chinese visitors to Lake Tyrrell as there are very few evening activities available to entertain overnight travellers. Focus would be on the interpretation of Indigenous astronomy and photo opportunities.

Supporting Projects

Other potential projects that could provide an Indigenous experience but which do not involve creation of a business enterprise are listed below. Some of the projects may support the selected Indigenous tourism business to be operated by BGLC depending on the nature of the enterprise.

Name	Location	Description
1. 'Lost in the Bush' project at Jane Duff Memorial	Near Mt Arapiles	Provide more onsite and guided interpretation, build on annual memorial event Paintings and photos in Horsham Art Gallery
2. Wotjobaluk Country mobile phone app	Wotjobaluk Country	A mobile phone app that will provide interpretive information, storylines and maps of Wotjobaluk Country for self-guided touring and to complement guided tours.
3. Tours to Pink Lake to harvest salt	Pink Lake	BGLC conducts harvesting of salt for Mount Zero; Dimboola had a food and wine festival for the first time this year.
4. School Art Camp hosted by Horsham Art Gallery	Horsham, Mt Arapiles	Trialed a 4-day school art camp in 2016 in Horsham, with an Indigenous tour of Yanga Track by Ron Marks. May consider operating at Mt Arapiles in 2017 with more Indigenous content.
5. Bush foods community garden at Lions Club area	Edenhope	BGLC involved with Lions Club to prepare. Also propose to include Indigenous artworks.
6. Aboriginal Cricket Trail	Harrow, Edenhope, etc.	Brochure to be redeveloped and onsite interpretation installed in 2017.
7. Johnny Mullagh Cricket Centre	Harrow	Upgrade of interpretation which has not been revised since opening 13 years ago. Working more closely with local Aboriginal communities would improve the interpretation.
8. Glenelg River Walk	Harrow	Inclusion of Indigenous and other heritage, flora and fauna interpretation along the trail
9. Wimmera Mallee Pioneer Museum	Jeparit	Upgrade of the museum, including the presentation and interpretation of Indigenous artefacts. A master plan has been prepared by Hindmarsh SC.
10. Edward Eyre River Walk	Jeparit	Install Indigenous interpretation along the Wimmera River Discovery Trail
11. Jaypex Park	Nhill	Sound shell could be used for Indigenous performing arts. A canoe tree is located within the park.
12. Rainbow Art Project	Rainbow	Recipient of Small Town Renewal funding. Landscaped garden with arts precinct including Indigenous art and bushfoods?
13. Herman's Hill	Near Nhill	Lookout with great views across the plains – opportunity for sunset tour and refreshments
14. 'Earth Oven' Festival	Horsham, along Wimmera River Discovery Trail	Learn about cooking using traditional earth ovens and clay balls. Second festival in 2016. Links to Tchingal story
15. World Boomerang Championships	Natimuk	Concept only
16. Hindmarsh Heritage Drive	Various in HSC	Self-guided driving tour to link major heritage tourism attractions. A project plan has been prepared.

4.2 Success Factors for Indigenous Tourism Businesses

Experience and research have identified that there are a series of factors behind many successful Indigenous tourism businesses. These include:

1. **Capacity building** – the roll-out of a business concept must occur within the capacity of the management organisation and the people involved. Planning for capacity development is critical and is the singular, most important ingredient in running a viable, long-term operation.
2. **Sustainable enterprise** – this is related to capacity - start the business venture on a small scale, including levels of investment, and grow slowly over time as capacity grows.
3. **Customer focused** – while often the motivation to develop an Indigenous tourism business is to communicate, train and work within one's culture, tourism experiences must meet market expectations or the business will become unviable. Visitors' needs and preferences have to be seamlessly combined with what the operator wants to achieve from the business.
4. **Partnerships** - when starting a business, utilise partnerships with other Indigenous and non-Indigenous tourism organisations to leverage from their skills, networks, infrastructure, marketing operations, etc. Build capacity of the business through leveraging from others.
5. **Mentoring** – draw on the expertise of others. In the early period of the business or during periods of expansion, engage a suitable mentor, talk to others with experience in the field, attain their input on your visitor experience; also experience similar types of tourism businesses.
6. **Investment** - ensure profits during the early years are re-invested into the business rather than used for other purposes.
7. **Networks** - build strong networks with the regional and state-wide tourism industry and media, and local community. This will open doors for the business.

These factors were considered when selecting potential Indigenous businesses and assessing their potential to succeed.

4.3 Longer-Term Approach to the Development of Indigenous Tourism in Wotjobaluk Country

Consultation with BGLC and the WITG has informed the following potential approach to grow Indigenous tourism in Wotjobaluk Country over time (not necessarily in order of implementation).

- Knowledge building. This requires a cultural heritage research project to identify clan-specific and site-specific traditional practices, stories and language.
- Introduction of guided tours with cultural interpreters for a range of markets across Wotjobaluk Country (as a commercial business through BGLC working with a range of tourism partners).
- Raised profile and awareness of Aboriginal culture in the region to stimulate demand for Aboriginal tourism experiences (start locally and grow from there).
 - Create a visual presence via artwork/sculptures in town centres, onsite signage at cultural sites with higher visitation for self-guided tours, including use of digital interpretive devices (wi-fi or mobile phone coverage), and acknowledgement of Country and Traditional Owners at main roads entering Wotjobaluk Country.
 - Create a strong online presence, with content about Wotjobaluk culture and heritage included on websites managed by Grampians Tourism, Wimmera Mallee Tourism, local councils, Parks Victoria, Wotjobaluk Country Tours.
 - Increase the interpretive presence at Brambuk: The National Park and Cultural Centre about Indigenous culture in Wotjobaluk Country and Indigenous tourism experiences available in that region.
- Tourism-associated business development, eg. bush food production, accommodation, etc.
- Develop digital tools that will assist people to discover the Indigenous heritage of the region through self-guided opportunities, eg. a mobile phone app.

This approach provides the context for the selection of initiatives which forms the focus of the feasibility assessments included in this report.

4.4 Selected Business Concepts

Following an initial scoping of the business ideas listed in Section 4.1, a short-list was presented and discussed with BGLC and the WITG. This resulted in the selection of a number of business concepts which were considered to have the greatest likelihood of success on the basis of:

- Best fit for BGLC’s aspirations and potential to grow the business as the capacity of the organisation grows – the concept of start small, learn about the tourism industry, build skills and expand over time;
- Provision of authentic experiences delivered by Traditional Owners of Wotjobaluk Country;
- Potential to provide services to visitor markets that are already visiting the project area, or the broader region;
- Potential to provide employment directly to local Indigenous people
- Potential to complement the offerings of other tourism partners already working in the project area, or in the broader region.

These business concepts are the subject of further feasibility assessment in Sections 5-7 in this report.

The primary business concept identified is the establishment of a tour company which would operate from the Wail Nursery site where Barengi Gadjin Land Council are now co-business owners, and where they will be moving their headquarters in 2017. The site would operate as a logistics hub/base. A Keeping Place could also be located at Wail Nursery. It could potentially attract visitors to the site but is not instrumental to the tour hub concept. It requires a separate feasibility assessment and extensive consultation with Indigenous communities in Wotjobaluk Country before consideration for inclusion at the Wail site.

The tour company will provide a range of tour products for different markets and in different locations across Wotjobaluk Country, including:

- a) Secondary School Camps at Mount Arapiles. Also includes visits to Johnny Mullagh Cultural Centre in Harrow, Jane Duff Memorial site.
- b) Cultural Tours and Ceremonial Experiences on Wotjobaluk Country

- c) Little Desert National Park: Nature-based and Indigenous cultural tours for group bookings associated with the Little Desert Nature Lodge working for Conservation Volunteers Australia; as well as tour guiding for other tour products conducted by CVA in the Wimmera-Grampians region
- d) Lake Tyrrell Boorong Night Sky Tours
- e) Bunjil’s Songline Tour: Grampians and Wimmera Mallee – Cultural Awareness Tours for corporate market; includes visits to Brambuk and Grampians National Park. This has the potential to become a tour for leisure travellers over time, and a self-guided tour.

The tour company would also oversee the development, maintenance and distribution of a Wotjobaluk Country mobile app that would provide interpretive information, storylines and maps of Wotjobaluk Country for self-guided touring and to complement guided tours.

A cultural heritage research project should be undertaken to inform the development of these tourism experiences.

The visitor facilities and interpretive signage that would be required at particular locations in relation to these tour products, and the development of a Wotjobaluk Country mobile phone app, would service a wide variety of independent travellers in addition to the visitors on tour experiences delivered by BGLC.

4.5 Product Descriptions

Description	Valuable factors
A. Tour Guiding Business with an Operational Hub at Wail Nursery	
<ul style="list-style-type: none"> • The logistics base/hub of tour operations – including an office for bookings, marketing, sales; facilities for training tour guides. • Possibly a final stopover for the Bunjil’s Songlines Tours to access a meeting space. • Possibly the location of a catering operation to support the tours (<i>a later development</i>) 	<ul style="list-style-type: none"> • Employment for Traditional Owners in Wotjobaluk Country • Aboriginal owned and controlled business enterprise • Current lack of tour guides in Wotjobaluk Country • Can develop the business over time and introduce more tour products as capacity builds • Potential for role / job sharing with other BGLC activities which can support the viability of a fledgling tourism business in the early years, while providing full-time employment to staff • An operational centre should be conveniently located for the business but not necessarily for visitors.
B. Secondary School Camps At Mount Arapiles	
<p>4-5 day camps of Indigenous cultural experiences in association with rock climbing / outdoor adventure activities. Meet curriculum requirements for physical education, geography, Aboriginal culture and heritage, etc.</p> <p><u>Involve Sites:</u></p> <ul style="list-style-type: none"> • Mt Arapiles-Toan State Park <ul style="list-style-type: none"> • Introduction to Australian Aboriginal societies and language, and important concepts such as songlines • Introduction to local Aboriginal culture • Boomerang making / painting and throwing • Bush foods • Traditional cooking techniques – clay balls in earth oven • Rock climbing • Abseiling • Bushwalking, orienteering, tracking skills 	<ul style="list-style-type: none"> • Strong existing market at Mount Arapiles with opportunity to meet demand for an Indigenous component • Extensive experience working with schools market within BGLC • Reasonable standard of facilities already present at Mt Arapiles. • Additional attractions in the proposed program will add diversity to the experience. • Discussions already started between BGLC and licensed tour operators based in Natimuk who focus on rock climbing. • Victorian Government regulation is likely to be introduced which will require all schools to conduct school camps through licensed tour operators (LTOs) (for risk management / public liability purposes). This means BGLC could market directly to LTOs rather than approach schools individually.

Description	Valuable factors
<p>Continued - Secondary School Camps at Mount Arapiles</p> <ul style="list-style-type: none"> • Jane Duff Memorial <ul style="list-style-type: none"> • Impact of European Settlement on local Aboriginal people – including life on Ebenezer mission, looking for work, skills as trackers, interaction between European and Indigenous communities • The story of “Lost in the Bush” • Johnny Mullagh Cricket Centre, Harrow <ul style="list-style-type: none"> • Connection to the story above of Indigenous people post European settlement, and the first Australian cricket team <p>Natimuk township – bike ride along the Natimuk Big Sky Trail, an off-road, relatively flat trail from Mt Arapiles to Natimuk (10km, 30 mins) - Street art, etc</p>	<ul style="list-style-type: none"> • As above
<p>C. Tours at Little Desert Nature Lodge</p>	
<p>Indigenous cultural and nature-based tours to complement Conservation Volunteers Australia’s (CVA) nature tours program associated with Little Desert Nature Lodge and other tours of the region, including potential tours of Grampians Peaks Trail.</p> <ul style="list-style-type: none"> • CVA is also seeking Victorian Government funds to assist with a major upgrade of the Lodge. 	<ul style="list-style-type: none"> • Enthusiasm towards the idea of a partnership from CVA • CVA needs to increase the number of trained Indigenous tour guides they have access to. • Potential for BGLC to learn from CVA’s experience operating a viable tour operation. • Existing demand for Indigenous tour guiding services to complement CVA programs. • Potential upgrade of the Lodge will grow visitation and demand for guiding services. It will also boost the profile of the Little Desert National Park. • CVA attracting a growing Chinese students market and other international group sectors.

Description	Valuable factors
<p>D. Bunjil's Songlines Tour</p> <p>2-3 day guided tour bringing together Free & Independent Travellers (FITs) including Grampians National Park and sites along the Wimmera River Discovery Trail. It could be run as a Cultural Awareness Program for corporate markets during its early years (working with organised groups) as opposed to endeavouring to attract FITs.</p> <p><u>Involve Sites</u></p> <ul style="list-style-type: none"> • Brambuk <ul style="list-style-type: none"> ○ Introduction to Australian Aboriginal societies and language, and important concepts such as songlines ○ Introduction to local Aboriginal culture ○ Introduction to Bunjil's songline • Rock art at Bunjil's Cave and other sites in Grampians National Park <ul style="list-style-type: none"> ○ Local Aboriginal traditions and stories • Scar trees on the Wimmera River near Antwerp / Ebenezer <ul style="list-style-type: none"> ○ Rivers, lakes and wetlands as a key resource for Aboriginal communities ○ Indigenous culture and traditional practices ○ Bush foods • Ebenezer Mission <ul style="list-style-type: none"> ○ Impact of European Settlement on local Aboriginal people including life on Ebenezer mission, looking for work, interaction between European and Indigenous communities • Antwerp Cemetery <ul style="list-style-type: none"> ○ Impact of European Settlement • Dimboola – The Ranch, The Common <ul style="list-style-type: none"> ○ Closure of the mission and impact on local Aboriginal people ○ History of people brought up in these areas – lifestyle, family relationships, etc 	<ul style="list-style-type: none"> • No-one is telling the Bunjil's Songlines story and the Pre- and post-European settlement story of Wotjobaluk Country. Commencing at Brambuk and the Grampians National Park, there is a great opportunity to focus on traditional Indigenous culture (including rock art) and show visitors the stunning Grampians, then move up the region to Ebenezer Mission and Dimboola to talk about the impact of European colonisation. • Marketing opportunity associated with Bunjil's Songline name and sites along the Wimmera River Discovery Trail, connection with Grampians National Park, etc. • Leveraging off the growing profile of GNP and the expected enormous increase in visitation to the Grampians Peaks Trail, and Brambuk by association. • Interest in cultural awareness training by corporate markets is growing. Potential to link the program to the development of a Reconciliation Action Plan to add extra value to the learnings for the client organisation.

Description	Valuable factors
E. Cultural Tours and Ceremonial Experiences	
<p>Cultural interpreters (tour guides) and ceremonial activities (eg. Welcome to Country, smoking ceremonies) available for relevant activities – booked as required:</p> <ul style="list-style-type: none"> • Festivals • Launches • Community and corporate events • School groups 	<ul style="list-style-type: none"> • Existing demand with little / no marketing • Natural role for BGLC to play • Provides a vehicle for training guides and as skills, capacity grows, to branch out to develop tours across the region.
F. Lake Tyrrell Boorong Night Sky tours	
<p>Guided night tours of the lake for Chinese visitors to Lake Tyrrell as there are very few evening activities available to entertain overnight travellers. Focus would be on the interpretation of Indigenous astronomy and photo opportunities given the reflection of clear night skies on the shallow waters of the lake (and the current popularity of sharing these images on social media).</p>	<ul style="list-style-type: none"> • A relatively ‘new’ product attracting new markets to the region • Significantly supported by Buloke Shire and Advance Sealake Inc. who are actively seeking funds for visitor infrastructure. • Demand for evening activities (only 15% of visitors are staying overnight).
G. Wotjobaluk Country mobile phone app	
<p>A mobile phone app that will provide interpretive information, storylines and maps of Wotjobaluk Country for self-guided touring and to complement guided tours.</p>	<ul style="list-style-type: none"> • Utilisation of digital technology which has high appeal and convenience for visitors. • Content could be used for a variety of web-based activities. • Less reliance on physical onsite infrastructure. • It could complement paid guided tours by providing information to visitors as the travel between sites.

5. ORGANISATIONAL AND OPERATIONAL ASSESSMENT

5.1 Organisation structure

5.2 Staffing and skills

5.3 Marketing channels

5.1 Organisation Structure

BGLC Structure

Barengi Gadjin Land Council was established in March 2005. The Land Council represents Traditional Owners from the Wotjobaluk, Jaadwa, Jadawadjali, Wergaia and Jupagulk family groups, who were recognised in the 2005 Native Title Consent Determination, the first in south-eastern Australia. BGLC is the 'Prescribed Body Corporate' for the Wotjobaluk claim area, as outlined in the Native Title Act, with the legal authority to work on behalf of Traditional Owners.

The Wotjobaluk Claim covers almost 36,000 square kilometres, and the Settlement gives Traditional Owners rights to practice traditional cultural activities and to be involved in the care and management of the land and its cultural heritage.

Aboriginal land councils represent Aboriginal affairs at state or territory level. They aim to protect the interests and further the aspirations of Aboriginal communities. BGLC is a Registered Aboriginal Party, as decided by the Victorian Aboriginal Heritage Council, in line with the Aboriginal Heritage Act 2006. BGLC is also a registered Aboriginal Corporation under the Corporations (Aboriginal and Torres Strait Islander) Act, or CATSI Act.

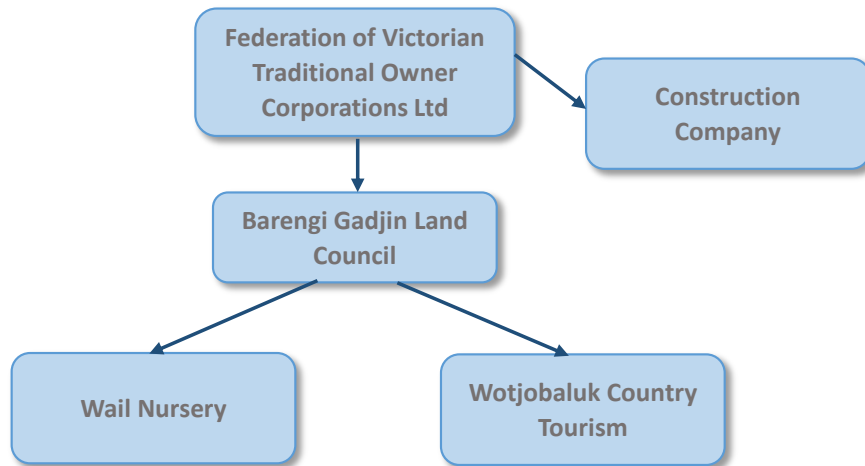
BGLC:

- Has an Australian Business Number (ABN 51 796 080 345)
- Is accepted as a not-for-profit entity with the Australian Tax Office and has income tax and fringe benefits tax exemptions.
- Is registered as a charity with the Australian Charities and Not-for-profits Commission (ACNC) and is an endorsed DGR (ie it has deductible gift recipient status).
- Has more than 200 Traditional Owner members, all of whom have proven their ancestral links to one of 7 Apical Ancestors registered in the Native Title Consent Determination.
- Owns the business name "Wail Nursery".

BGLC is a member of the Federation of Victorian Traditional Owner Corporations, a company limited by guarantee. FVTOC is a 51% owner of a construction company that provides a new solution to capital works projects across Australia (with Cockram Construction Ltd as the venture partner).

The organisational linkages for BGLC, including the potential addition of a tourism enterprise, provisionally named 'Wotjobaluk Country Tourism' in this feasibility assessment, are summarised in Figure 5.1.

Figure 5.1: Indicative Barengi Gadjin Organisational Structure: On Implementation of Tourism Enterprise



Tourism Enterprise Structure Options

Business structure and shareholding or membership of the entity for the enterprise are important considerations in establishing Wotjobaluk Country Tourism. There are three main options for the business structure of the BGLC Tourism Enterprise, provisionally named **Wotjobaluk Country Tourism**. These are:

- a) An operating division, or unit, of Barengi Gadjin Land Council. Within the legislative scope and mandate of an Aboriginal Land Council, BGLC has the authority to:
 - o Promote community development and improve service delivery
 - o Pursue cultural, social and economic independence for Aboriginal people, maintain and enhance Aboriginal culture, identity and heritage.

The operation of a tourism enterprise is consistent with these activities. As a business within the existing structure, a new entity would not be required, just the registration of a business name (such as 'Wotjobaluk Country Tourism') in the same way that Wail Nursery is registered as a business name of BGLC.

- b) A proprietary company, 100% owned by BGLC but with potential to introduce other shareholders or venture partners over time, should the opportunity to diversify, value add or vertically integrate arise. Although BGLC has not-for-profit and community development objectives at the core of its values, a proprietary company structure could be attractive to other potential partners who could offer financial resources, skills and experience, or supply chain options.

For example,

- The Bunjil's Songline Tour component of Wotjobaluk Country Tourism could become the main product (or product range) of the enterprise and it may make sense to invite one or more Indigenous organisations in adjacent regions to become shareholders in the business.
 - A formal relationship with a private sector accommodation provider (such as the Little Desert Lodge), tour operator, or transport or travel group might be secured through a shareholding in Wotjobaluk Country Tourism.
- c) A company limited by guarantee, which would have not-for-profit objectives consistent with those of the BGLC structure, but as a separate entity, would not rely on BGLC for financial support (except by formal agreements and contracts) nor would the assets and operations of BGLC be at risk through the activities of Wotjobaluk Country Tourism. This structure is likely to offer the income and FBT tax exemptions available to BGLC, but not necessarily the DGR status. Establishing the tourism venture as a company limited by guarantee would also send a clear message to the community and other stakeholders that the business is established for the benefit of the community (as a social enterprise) in which jobs, skills development, and restoration and respect for culture, are of at least equal importance to financial performance.

These broad options for legal structures for Wotjobaluk Country Tourism to implement infrastructure improvements, capital development works and manage the commercial tourism venture with or without the involvement of other organisations, are summarised in Table 5.1.

Some of the advantages and disadvantages of each business structure option are:

Business Name Subsidiary of BGLC

A simple business name could be a permanent or short-term structure, possibly only in the establishment phase, particularly if the parent body (BGLC) is better placed to:

- Attract funds to assist with securing establishment or operational funds
- Assist to attract additional sponsors or supporters to the development and potential funding bodies.

Other advantages of a subsidiary through a business name are:

- It is very easy to establish.
- Costs to establish and maintain are very modest.
- All tax benefits and exemptions which accrue to BGLC will also accrue to from some taxes due to its non-profit nature.

Disadvantages are:

- BGLC and its Board will be directly responsible, and potentially liable, for the tourism enterprise.
- BGLC members may not see their role as acting as the direct delivery agent for a venture of this nature.
- The drive and commitment to succeed may not be as focused, compared with a dedicated entity.

Proprietary Company

A proprietary company limited by shares is the most common form for business ventures in Australia and is relevant if the stakeholders believe that a commercial operation is appropriate and/or the most appropriate vehicle to attract capital funding.

Advantages include:

- Limited liability of directors
- The corporate structure facilitates the co-ordination of interests of multiple stakeholders (partner organisations could become shareholders, for example).
- There is greater scope in raising finance.
- It is a clear private sector identity.

Disadvantages include:

- A need to focus on profitability as one of the primary drivers for the venture, rather than a more community service focused role.
- Loss of not-for-profit status and associated tax benefits.

Company Limited by Guarantee

The distinction between this and a proprietary company is that it is limited by the guarantee of either an organisation(s) or individual(s) rather than limited by shares, and usually has 'not for profit' objectives.

Advantages over the private company structure (from the not-for-profit status) could be that:

- Public sector organisations may be able to take up membership (or at least be represented on the Board of Directors)
- The company would be given income tax exemption status and, depending on the objectives, possibly 'public benevolent' status.
- The company may have eligibility for a range of grants or other government support mechanisms.

Table 5.1: Broad Description of Business Structure Options

Structure	Description
Business Name Subsidiary	Using an existing organisation as a parent structure to conduct the venture. The parent can be a company, trust, association or statutory authority.
Private Company	A company is a legal entity separate and distinct from its owner, and it has many of the rights, duties and privileges of an actual person. A private company is limited by shares and the number of shareholders is restricted
Company Limited by Guarantee	A company with members, rather than shares, and not-for-profit objects. Although it is a public company it is not listed on the stock exchange and can determine who is eligible to be a member.

The most appropriate suggested legal structure for Wotjobaluk Country Tourism is to be registered as a business name of BGLC in the short-term, and to incorporate as a company limited by guarantee after the enterprise has begun to trade successfully and provide evidence of sustainability.

5.2 Staffing and Skills

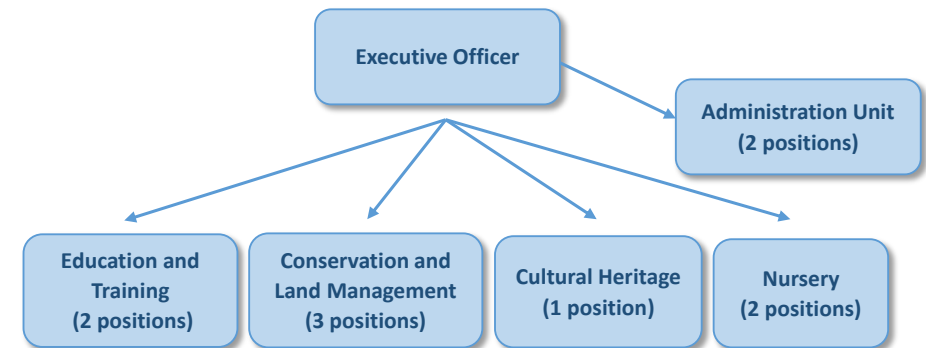
Existing Staffing at BGLC

The core business of BGLC is reflected in the current staff positions, the skills and the services offered by the organisation. BGLC works to protect and restore Country through National Resource Management (NRM) services, and supports training and development of Traditional Owners to build economic and sustainable outcomes. BGLC is the broader community's link to Traditional Owners, working with stakeholders to promote the cultural wellbeing of members, through efforts to reconnect them to country.

In the period 2010 – 2014, BGLC experienced considerable legal and financial difficulty, leading to organisational restructuring and changing of personnel.

BGLC's staff team at the end of 2016 is comprised of eleven positions, representing 10 full time equivalent jobs, organised into five functional areas as shown in Figure 7.2. The staff working in the Conservation and Land Management Team and the Education Unit have been earmarked as the most likely members of the existing staff team to multi-task in the delivery of tourism services.

Figure 5.2 Barengi Gadgin Staff Structure, December 2016



The entire BGLC staff team are expected to be relocated to purpose built premises at the Wail nursery site. Capital development costs for the tourism enterprise components of this facility are included in the 'capital and infrastructure' developments in Section 6. Operational systems and equipment, additional to BGLC's standard fitout (furnishings, computers, communications equipment) will be minimal, other than catering and kitchen equipment associated with the proposed commercial kitchen.

Staffing and Skills Capacity Required for the Wotjobaluk Tourism Enterprise

At least 2 of the existing BGLC staff are believed to be well suited to working in the Wotjobaluk Country Tourism enterprise, perhaps in complement to their current duties, at least initially. This includes Ron Marks, who has been instrumental in identifying suitable tourism products and potential visitation routes during the feasibility assessment process. As well as Ron, two of the staff team in the Conservation and Land Management area are understood to be suited to working in tourist services.

BGLC also has casual access to two external professionals with expertise in tourism and cultural education: one is a local teacher and another has experience working at the Brambuk Cultural Centre. At least one of these resources could be engaged full-time with Wotjobaluk Country Tourism, and the other is available as a casual trainer for new tourism staff or casual guides.

Certificate 3 in Tourism

BGLC's preferred model for training regular and casual staff in tourism is to use the South West TAFE Certificate 3 in Tourism as a base, and adapt it for practical use with their in-house trainers. Additional to the Certificate 3 training (or components of it), BGLC trainers would assess participants for their practical competency. Any Certificate 3 components completed should qualify as RPL (recognition for prior learning) credits should the person not complete the full accreditation.

Certificate 3 in Tourism is a qualification intended as a pathway to work in tour operations businesses, inbound tour operations, visitor information centres, attractions, cultural and heritage sites and any small tourism business requiring multi-skilled employees. Modules from the Certificate 3 in Tourism considered to be most valuable for developing capacity and competency for Indigenous guide staff of Wotjobaluk Country Tourism include:

Communication and Teamwork

- Provide a briefing or scripted commentary

Guiding

- Interpret aspects of local Australian Indigenous culture
- Lead tour groups
- Prepare and present tour commentaries or activities

- Develop and maintain the general and regional knowledge required by guides
- Research and share general information on Australian Indigenous cultures
- Prepare specialised interpretive content on flora, fauna and landscape
- Prepare specialised interpretive content on cultural and heritage environments

Communication and Teamwork

- Communicate in the workplace

Crisis Management

- Respond to a customer in crisis

First Aid

- Provide first aid (and in remote situations)

Food and Beverage

- Serve food and beverage

Work Health and Safety

- Identify hazards, assess and control safety risks

Mentoring

It is also important that staff in the business draw on the knowledge of people who are experienced in operating an Indigenous tour guiding business, as well as selected tourism industry and community members. This could involve:

- Working with a mentor from a successful Indigenous tour guiding business
- Receiving regular business advisory support
- Participating in other Indigenous tours
- Conducting a few 'trial' tours for local Indigenous community members and tourism industry representatives to attain feedback on their experience and suggestions for improvement.

Staffing arrangements

Suggested staffing arrangements to service the Wotjobaluk Country Tourism enterprise (which are included in the viability projection in Section 7) are the appointment of:

- Tour Guides, preferably filled by people from the local/regional Indigenous community. Projections allow for 1.8 full time equivalent tour guides on staff and casual tour guides, in proportion to tour demand each year.
- Educational and Cultural Heritage staff, also preferably filled by Indigenous people from the local or broader region. Projections allow for 1.3 full time equivalent positions on staff.
- Marketing and administration staff. Projections allow for 0.1 full time equivalent positions (shared with other BGLC roles) on staff (although it is assumed that some of the Tour Guides and Educational and Cultural Heritage staff would have marketing and administration functions as part of their job descriptions.
- Ceremonial presenters and dancers/performers. Projections allow for casual presenters and performers, in proportion to functions and tours conducted each year.

Organisational Partnerships to Enhance Skills and Tourism Services

Conservation Volunteers Australia and New Zealand (CVA) and Little Desert Nature Lodge (LDNL) are the first two partner organisations to provide details of how a relationship with Wotjobaluk Country Tourism could enhance the range of skills of the organisations for mutual benefit. CVA has confirmed their interest in developing a relationship and working with BGLC/Wotjobaluk Country Tourism, in an arrangement which would enhance the skills and competitiveness of both organisations (and LDNL), through:

- Contracting Wotjobaluk Country Tourism tour guides to deliver Indigenous and nature-based content as part of CVA and Little Desert Nature Lodge (LDNL) programs covering Indigenous cultural tours, Welcome to Country ceremonies, and dancing, and possibly extending to nature and environment tours.

- Wotjobaluk Country Tourism/BGLC to bring tours to the Lodge for accommodation and meeting spaces (eg. Bunjil's Songline tour – cultural awareness program)
- Wail Nursery's bushfoods to supply LDNL for their menu.
- LDNL to undertake catering for tour products delivered by BGLC on and off-site.
- As a registered training provider, LDNL could service some of BGLC's training needs such as delivering and hosting courses in Risk Management, Governance, Conservation Land Management, and Health and Safety, and in facilitating Wotjobaluk Country Tourism tour guides to use their RPL credentials to achieve full Certificate 3 in Tourism accreditation.

At present LDNL currently relies on one Indigenous tour guide to provide all Indigenous content in their programs, and would prefer guides to have the capacity to deliver content on flora, fauna and CVA conservation programs, in addition to Indigenous cultural heritage. This is both an added skill for the guide, and it improves the capacity of all the organisations involved to provide flexible and responsive tours.

This enhanced skilling and capacity partnership could be a pilot for a wider rollout to other organisational partnerships in the region, such as:

- Harrow Discovery Centre and West Wimmera Shire for the Johnny Mullagh Cricket Centre and other district tours.
- Buloke Shire Council and the likely tourism groups to be established in servicing Lake Tyrrell.
- Yarriambiack Shire in delivering new tours and guided walks as an offshoot from the developing Art Silo Trail around Sheep Hills, Brim, Rupanyup, Roseberry, Lascelles and Patchewollock.

5.3 Marketing Channels

There are a range of marketing opportunities that would be beneficial to support the operation of a viable guided tours venture:

- **Tourism operator partners** – working with other licensed tour operators (LTOs) who already have marketing programs in place that target specific markets (eg. secondary school children, or international special interest groups) will take the pressure of the Wotjobaluk Country enterprise to attract their own markets and compete with a wide range of competitors. Working with the international and domestic travel trade is also more likely to be the province of the partner LTOs.
- **Tourism industry partners** – working with local visitor information centres (eg. Horsham) has the potential to provide an important marketing presence targeting visitors who have arrived in the region. Relationships with other regional and state organisations will also be very important, namely Wimmera Mallee Tourism, Grampians Tourism and Visit Victoria.
- **Local community** – raising awareness within the local community about the ceremonial experiences that can be undertaken, through print advertising, radio, and a strong, regular presence at community events. Good relationships with community leaders will also support bookings.
- **Brambuk Cultural Centre** – an interpretive presence at Brambuk about Indigenous tourism experiences available in Wotjobaluk Country will help to raise awareness of the various tours.
- **Online presence** – providing information about Wotjobaluk Country and its Indigenous communities (that is approved by the communities) on regional / council / state tourism websites is a relatively low cost initiative that leverages from other organisations' web presence and marketing efforts. Wotjobaluk Country Tourism will also require its own website, preferably with online bookability of tour products (depending on the product).
- **Digital content producers** – working with well-known bloggers and vloggers to gain exposure through their many followers can be a very effective marketing channel when targeting people with specific interests.

- **Collateral** – printed marketing collateral produced by regional tourism partners will underpin other online activities.
- **Familiarisation tours** – it is very important to host media and other tourism industry representatives on tours of your products to access the promotional opportunities they can provide.
- **Business market activities** – attending conferences and events which focus on selling experiences to the business market will be valuable for the Cultural Awareness Tours.
- **Direct Marketing** – to special interest groups via post, email or telephone (depending on the tour product)

A marketing plan should be prepared for each product provided by Wotjobaluk Country Tourism as the relevant market segments, sales and channels to market and delivery of the experiences are quite different.

6. INFRASTRUCTURE ASSESSMENT

6.1 Infrastructure and capital development improvements

6.2 Managing the Wotjobaluk Country tourism sites

6.1 Infrastructure and Capital Development Improvements

The calculated costings for the provision of capital works and infrastructure to support the direct and the indirect (ie cultural tourism initiatives in which Wotjobaluk Country Tourism has a component within a larger initiative, managed by another organisation) development of Wotjobaluk Country Tourism, are detailed in Tables 6.1 to 6.9.

Table 6.1: Wotjobaluk Country Tourism Initiatives: Summary of Capital Development and Infrastructure Costs

Tourism Product	Associated Infrastructure Costings excluding project management fees
a. Tour Operations Hub at Wail Nursery	\$478,274
b. Secondary School Camps at Mt Arapiles-Tooan State Park, including upgrade of Johnny Mullagh Cricket Centre	\$270,600
c. Cultural Tours and Ceremonial Experiences on Wotjobaluk Country	-
d. Little Desert National Park: nature-based, Indigenous cultural tours and nocturnal experience (excluding upgrade of Little Desert Nature Lodge)	\$50,000
e. Bunjil's Songline Tour	\$437,975
f. Wotjobaluk Country Mobile App	\$50,000
Total Infrastructure and Capital Works	\$1,286,849

SOURCE: Street Ryan and Insight Communications Estimates (December 2016) using Industry Data, Quantity Surveying Estimates

Estimate for Johnny Mullagh Centre in consultation with West Wimmera Shire Council

Table 6.2: Lake Tyrrell Tourism Developments

The Lake Tyrrell tour concept is listed as a separate project as the proposed infrastructure relates to a much larger number of visitors than those likely to experience the Boorong Night Sky Tours.

Tourism Product	Associated Infrastructure Costings
Lake Tyrrell Boorong Night Sky Tours	\$2,002,000

SOURCE: Lake Tyrrell Tourism Strategy, Buloke Shire Council, October 2016.

Table 6.3 Tour Operations Hub at Wail Nursery

Description	Themes	Visitor Markets	Infrastructure Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Specifications	Infrastructure Costings
<p>Development of a tour company to be based out of the Wail Nursery where BGLC are now co-business owners, and where they will be moving their headquarters in 2017. The site will operate as:</p> <ul style="list-style-type: none"> The logistics base/hub of tour operations – including an office for bookings, marketing, sales; facilities for training tour guides. Possibly a final stopover for the Bunjil’s Songlines Tours to access a meeting space. Possibly the location of a catering operation to support the tours <i>(a later development)</i> Note that BGLC are leasing the nursery site from the State Government (negotiations are currently underway for a new lease). The tour company would be co-located with the Parks Victoria office for Little Desert National Park and depot servicing the Wimmera (PV are yet to commit to an ongoing presence at Wail Nursery). The concept for a Cultural Centre / Keeping Place as conceived for Dimboola involves a cultural education centre that houses key Indigenous artefacts, provides educational programs and tours, and includes a gallery, museum and performance space. <i>This may not be a viable option if the Keeping Place is co-located at Wail Nursery due to distance from a larger residential population and BGLC community members.</i> 	N/A	N/A	Building including tours office and meeting / training room (adjacent to offices for other BGLC functions; joint use of training / meeting rooms)	Building area for tourism: 105 square metres configured into 2 offices (5 x 4, 3 x 5), a meeting room (6 x 5 metres) and foyer/tours office (6 x 5), Kitchenette (4 x 2.5) - airconditioned	\$173,040
			Office furniture, equipment, training facilities	Office furniture: Board table, desks, chairs, a/v system	\$33,150
			Digital connections – <i>unsure what’s currently available</i>	IT allowance	\$5,505
			Utilities, including water – <i>unsure what’s currently available</i>	Utility connections (assuming headworks) and wiring ²	\$44,995
			Kitchen (for staff and to support use of meeting space)	Kitchenette (plumbing, sink, refrigerator, microwave)	\$21,000
			Toilets	Male and female toilets for 2 each including disabled access ³	\$50,505
			Landscaping, carparking	Landscaping ⁴ , carparking for 10 vehicles	\$86,400
			Business signage	Commercial signs x 2 plus sandwich boards ⁵	\$3,214
			Commercial kitchen ⁶	<i>See footnote</i>	\$60,465

Footnotes to Table 6.3:

1. Dimboola remoteness construction factor 103%
2. Remote water metre device 25mm \$495, 20 power points x \$125, sub-main connection (\$22,000)
3. Standard construction and basic finishes 30 sqm
4. Large area landscaping (1 hectare @ \$5.65 sqm)
5. Billboard style signs (\$1257 each) Sandwich boards (2 x \$350)
6. Commercial Kitchen equipment

	Full Scale	Reduced
- Convection oven and ranges	\$24,650	\$17,255
- Steaming equipment	\$27,500	
- Generator	\$26,300	
- Brat-pan/self-generating pans	\$31,100	
- Warmers	\$1,000	\$1,000
- Glass washer	\$3,810	\$3,810
- Dishwasher	\$29,000	\$14,500
- Salamander griller/toaster	\$5,100	\$5,100
- Preparation equipment	\$44,000	\$11,000
- Cleaning, waste disposal	\$7,800	\$7,800
Total	\$200,260	\$60,465

SOURCE: Street Ryan and Insight Communications Estimates (December 2016) using Industry Data and Quantity Surveying Estimates

Table 6.4: Secondary School Camps at Mount Arapiles-Toooan State Park

Developments at Mount Arapiles-Toooan State Park, Jane Duff Memorial site and Johnny Mullagh Cricket Centre, Harrow

Description	Interpretive Themes	Visitor Markets	Infrastructure Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Specifications	Infrastructure Costings
<p>4-5 day outdoor adventure camps for secondary school students that include Indigenous cultural experiences, rock climbing, orienteering, etc. It would meet the curriculum requirements for physical education, geography, Aboriginal culture and heritage, etc.</p> <p>BGLC would provide Indigenous activities as part of the camps organised by the schools or licensed tour operators. Tour guides would deliver activities on site bringing all required equipment.</p> <p><u>Involve Sites:</u></p> <ul style="list-style-type: none"> Mt Arapiles-Toooan State Park Jane Duff Memorial <i>Optional</i> - Natimuk township – bike ride 	<p>Mt Arapiles-Toooan SP</p> <ul style="list-style-type: none"> Introduction to Australian Aboriginal societies, language, concepts such as songlines Introduction to local Aboriginal culture Boomerang making / painting and throwing Bush foods Bunjil Creation Stories Traditional cooking techniques – clay balls in earth oven Indigenous tracking skills <p><i>(not provided by BGLC - rock climbing, abseiling, bushwalking, orienteering, study of flora, fauna, geology, etc)</i></p>	<p>Secondary schools in Melbourne, Mildura and Adelaide</p> <p>Secondary schools in Wimmera-Mallee-Grampians region</p>	Onsite signage of Indigenous cultural interpretation	Interpretive signing: 5 signs 600x900 mm	\$17,625
	A shelter, seating and tables for larger groups, eg. to undertake boomerang painting, or other activities in inclement weather. Include fire pit / fireplace. (NB. a large shelter is already located at the park. Additional shelter is to accommodate Indigenous activities when site is busy with other campers.)		Outdoor furniture and pit/fireplace	\$11,500	
	<i>Client or Licensed Tour Operator would provide transport for students</i>				
	<i>Bring own bikes for bike riding option</i>				
	More onsite and guided interpretation on the story from an Aboriginal perspective		Interpretive signing: 3 signs 600x900 mm	\$10,575	
	Trail linkage to Duff House replica		Pathway 500 metres (3 metres wide)	\$11,000	
	Additional picnic facilities		Outdoor furniture	\$8,500	

along Big Sky Trail, an off-road trail from Mt Arapiles to Natimuk (10km, 30 mins) • Johnny Mullagh Cricket Centre, Harrow	European and Indigenous communities • The story of “Lost in the Bush” • Flora / fauna		Directional signage on road	Directional signs x 2	\$1,500
	Johnny Mullagh Cricket Centre • Connection to the story above of Indigenous people post European settlement, and the first Australian cricket team		Upgrade of interpretation which has not been refreshed since opening 13 years ago, including digital interpretation. Work more closely with local Aboriginal communities to improve the interpretation.	Interpretive design and materials: Advisory and professional fees (\$20,950)+Direct expenses (\$2,800)+Fabrication (\$4,000)+Installation (\$2,150), Structural improvements (\$180,000)	\$209,900

SOURCE: Street Ryan and Insight Communications Estimates (December 2016) using Industry Data and Quantity Surveying Estimates

Table 6.5 Cultural Tours and Ceremonial Experiences on Wotjobaluk Country

Developments at Related Sites

Description	Interpretive Themes	Visitor Markets	Infrastructure Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Specifications	Infrastructure Costings
Cultural interpreters (tour guides) and ceremonial activities (eg. Welcome to Country, smoking ceremonies, dancing) available for relevant activities – booked as required: <ul style="list-style-type: none"> • Festivals • Launches • Community and corporate events • School groups 	Various	Various	<i>Guides / dancers use own transport</i> <i>Use offices as part of Wail Tour Operations hub</i>	N/A	N/A

Table 6.6: Little Desert National Park and Little Desert Nature Lodge: Nature-based & Indigenous cultural tours (excluding proposed accommodation upgrade of LDNL)

Developments at Little Desert Nature Lodge*

Description	Interpretive Themes	Visitor Markets	Infrastructure Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Specifications	Infrastructure Costings
Indigenous cultural and nature-based tours to complement Conservation Volunteers Australia’s (CVA) nature tours program associated with Little Desert Nature Lodge Also, CVA’s Naturewise tours to the region potentially to include tours of Grampians Peaks Trail commencing in next few years.	Indigenous culture and traditional practices, including land management	International visitors (groups) Secondary school students (domestic)	The majority of the opportunities for BGLC in partnership with CVA are dependent upon the Little Desert Nature Lodge being upgraded to 4-4.5 star accommodation	<i>Business case under development by CVA / funding request to Victorian Government</i>	-
	Natural environment flora and fauna CVA’s conservation programs	Corporate groups Special interest leisure groups (eg. bushwalkers)	Interpretive onsite features, eg. artwork (sculpture), information boards	-	\$25,000
			Shelter for Indigenous interpretive experiences in all weather		\$25,000

* Note: It is proposed that the infrastructure above would be developed in association with BGLC and owned / managed by CVA. It could be used for other visitor activities in addition to supporting Indigenous experiences. Also note in Table 6.9 infrastructure related to the delivery of Bunjil’s Songline Tour which includes an Indigenous experience dinner at a magnificent outdoor location at Little Desert Nature Lodge or Little Desert National Park.

SOURCE: Street Ryan and Insight Communications Estimates (December 2016) using Industry Data and Quantity Surveying Estimates

Table 6.7 Wotjobaluk Country Mobile App development

Development of Wotjobaluk Country Mobile App

Description	Interpretive Themes	Visitor Markets	Infrastructure Required	Infrastructure Specifications	Infrastructure Costings
A mobile app that includes interpretive information, storylines and maps of Wotjobaluk Country which can be used for self-guided touring and to complement guided tours (eg. in coach travelling between sites).	<p>Introduction to Aboriginal people in South-Eastern Australia and Wotjobaluk Country;</p> <p>Traditional cultures and practices, flora and fauna, land management;</p> <p>Introduction to impact of European settlement</p>	<p>All markets associated with other Indigenous experiences (awareness of app via licensed tour operator / BGLC);</p> <p>Independent travellers in Wotjobaluk country (awareness via VICs, Brambuk, etc.)</p>	App development, requiring extensive research and consultation with BGLC	-	\$50,000

Table 6.8 Lake Tyrrell Boorong Night Sky Tours

Developments at Lake Tyrrell

The following infrastructure is identified in the 2016 Lake Tyrrell Tourism Strategy and is designed to cater for a wide range of visitor markets. It would also support Boorong Night Sky Tours conducted by BGLC.

Infrastructure Requirements	Infrastructure Costings
Bollards and gates to southern end of lake to protect lake bed and provide visitor safety (in progress)	\$60,000
Viewing area with all ability toilet facilities	\$370,000
Car park (at viewing area) with turnaround facilities for buses/larger vehicles	\$390,000
All weather gravel access track around southern rim of lake and pedestrian access	\$135,000
Waste management / screenings	\$50,000
Interpretive and way finding signage	\$100,000

Boardwalk at southern end of lake to protect environment and direct visitors	\$200,000
Establishment of permanent water pond at southern end of lake	\$100,000
TYRRELL letters for entry point	\$60,000
Boom gate entry with swipe credit card access at the 2 entry locations: Baileys Road and Saltworks Road	\$37,000
Calder Highway – right turning lane into Baileys Road to avoid accidents on high use highway	\$500,000

SOURCE: Lake Tyrrell Tourism Strategy October 2016

Table 6.9 Bunjil’s Songline Tour – Cultural Awareness Program

Target Market: Corporate groups based in the Wimmera-Mallee-Grampians region, Mildura, Melbourne, Adelaide
 This tour is designed to achieve corporate outcomes related to the development of a Reconciliation Action Plan.

Developments along Bunjil’s Songline Tour

Time	Itinerary	Activity	Interpretive Themes	Infrastructure Support Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Costings
Day 1: Wednesday					
2.00pm-5.00pm	Travel from Melbourne to Halls Gap (3 hours)	<ul style="list-style-type: none"> Transport by coach 	-	Coach 22 seater (hire)	-
5.00pm-5.30pm	Check into Halls Gap accommodation (1 night)	<ul style="list-style-type: none"> Accommodation 	-	-	-
5.30pm-7.00pm	Welcome to Country and Bunjil’s Songline Tour itinerary briefing	<ul style="list-style-type: none"> Meet Bunjil’s Trail tour guide 	<ul style="list-style-type: none"> Acknowledgement of Traditional Owners, introduction to Country Outline of 2-day program Confirm corporate outcomes sought 	-	-

Time	Itinerary	Activity	Interpretive Themes	Infrastructure Support Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Costings
7.00pm-9.00pm	Dinner at local restaurant	<ul style="list-style-type: none"> Experience a tasting of traditional Indigenous bush foods 	<ul style="list-style-type: none"> Taste and experience Indigenous foods 	-	-
Day 2: Thursday					
7.00am-8.00am	Breakfast and check out of accommodation	-	-	-	-
8.30am-10.00am	Brambuk Aboriginal Cultural Centre	<ul style="list-style-type: none"> Cultural interpretation by tour guide Tour of Brambuk Experience (or Gariwerd Dreaming Theatre if upgrade not yet undertaken) 	<ul style="list-style-type: none"> Introduction to Australian Aboriginal societies and language, and important concepts such as 'songlines' Introduction to local Aboriginal culture <ul style="list-style-type: none"> Bunjil's Songline Importance of rivers, lakes and wetlands to Aboriginal culture; Seasons – flora, fauna, traditional practices Creation stories Brambuk – how and why developed, who manages, significance to Aboriginal communities Connections with other communities and landscapes in SW Victoria 	Upgrade of interpretive experience at Brambuk recommended as a separate project. Process to involve extensive consultation.	-

Time	Itinerary	Activity	Interpretive Themes	Infrastructure Support Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Costings
10.00am-10.30am	Bushfoods Café (Brambuk)	<ul style="list-style-type: none"> Morning tea 		-	-
10.30am-11.30am	Travel by coach to view rock art at Bunjil's Shelter	<ul style="list-style-type: none"> Guided tour 	<ul style="list-style-type: none"> Resting place of the Aboriginal Dreamtime creator spirit Bunjil 	Upgrade of facilities and signage required <i>(funding already attained)</i>	-
11.30am-12.30pm	BBQ lunch in Halls Gap			-	-
12.30pm-1.30pm	Travel by coach from Halls Gap to Northern Gariwerd (1 hour)			-	-
1.30pm-2.00pm	View Aboriginal rock art at Gulgurn Manja (Flat Rock) and Ngamadjidj (Cave of Ghosts)	<ul style="list-style-type: none"> Guided tour 	<ul style="list-style-type: none"> Local Aboriginal traditions and stories 	onsite interpretive boards compost toilet and other upgrades	\$10,575 \$12,000
2.00pm-3.30pm	Travel by coach from Northern Gariwerd to Little Desert Nature Lodge (1.5 hours)	<ul style="list-style-type: none"> Travel via Natimuk and Mount Arapiles-Tooan State Park 	<ul style="list-style-type: none"> Learn about local Aboriginal culture and sites (eg. Mitre Rock) along the way 	-	-
3.30pm-4.00pm	Check into accommodation at Little Desert Nature Lodge (1 night)	<ul style="list-style-type: none"> Accommodation 		<i>Requires 4 star upgrade of facilities as per CVA proposal</i>	-

Time	Itinerary	Activity	Interpretive Themes	Infrastructure Support Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Costings
4.00pm-6.00pm	Bunjil’s Trail tour guide discussion, Q&A session at Little Desert Nature Lodge	<ul style="list-style-type: none"> Discuss the day’s learning Group’s organisation reconciliation journey 	<ul style="list-style-type: none"> Discuss the organisation’s requirements to build the foundations for relationships, respect and opportunities in relation to formalising a Reconciliation Action Plan (RAP) 	-	-
7.00pm-9.00pm	Indigenous experience dinner at magnificent outdoor location at Little Desert Nature Lodge or Little Desert National Park	<ul style="list-style-type: none"> Dinner Campfire – Indigenous music, dancing, storytelling, astronomy 	<ul style="list-style-type: none"> Taste and experience Aboriginal culture 	Supporting infrastructure for outdoor dinner location near the Lodge - platform, hut for cooking, seating / tables, compost toilet in grounds of Little Desert Nature Lodge or Little Desert National Park <i>(to be developed in conjunction with BGLC and owned / managed by CVA)</i>	\$60,000
Day 3: Friday					
7.00am-7.45am	Travel by coach from Little Desert Nature Lodge to Herman’s Hill (45 minutes)				
7.45am-8.45am	Breakfast outdoors ** Subject to weather **	<ul style="list-style-type: none"> Take a walk through the Mallee scrub to Herman’s Hill – 360 degree views over the surrounding district 		Lookout upgrade and interpretive signage	\$12,000
				Composting toilet in Herman’s Hill area	\$15,000

Time	Itinerary	Activity	Interpretive Themes	Infrastructure Support Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Costings
8.45am-9.15am	Travel by coach from Herman’s Hill to Ebenezer Mission (30 minutes)				
9.15am-10.30am	Ebenezer Mission	<ul style="list-style-type: none"> Guided tour 	<ul style="list-style-type: none"> Introduction to government policy in relation to Indigenous peoples after European settlement 	Interpretive signage (outside and inside the site)	\$40,475 (Outside \$10,575, Inside \$29,900)
			<ul style="list-style-type: none"> Moravian missionaries and the Aboriginal community 	Cultural heritage assessment of site	\$35,000
				Carpark relocation	\$44,850
			<ul style="list-style-type: none"> Impact of European settlement on local Aboriginal people including life on Ebenezer Mission, looking for work, interaction between European and Aboriginal communities 	Upgraded walking tracks	\$55,000
10.30am-11.00am	Travel by coach to view scar trees on the Wimmera River Discovery Trail	<ul style="list-style-type: none"> Guided walking tour of scar trees on the Wimmera River Discovery Trail 	<ul style="list-style-type: none"> One of the largest number of scar trees within close proximity in Victoria 	A cultural heritage management plan to support the Wimmera River Discovery Trail Report.	
			<ul style="list-style-type: none"> Rivers, lakes and wetlands as a key resource for Aboriginal communities Cultural uses of the bark 	Trail development and management	\$80,000 – possibly part of Wimmera River Discovery Trail Feasibility Project

Time	Itinerary	Activity	Interpretive Themes	Infrastructure Support Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Costings
11.00am-11.30am	Travel by coach to the Antwerp Cemetery	<ul style="list-style-type: none"> Guided tour 	<ul style="list-style-type: none"> Sam Kinnear's monument and grave sites of Aboriginal people Impact of European settlement on the local Aboriginal community 	-	-
11.30am-11.45am	Travel by coach from Antwerp to Dimboola (15 minutes)	-	-	-	-
11.45am-12.45pm	Picnic lunch Nine Creeks Reserve – Dimboola Common	<ul style="list-style-type: none"> Short guided walk along the creek Lunch 	<ul style="list-style-type: none"> Introduction to Aboriginal community life after closure of the Ebenezer Mission – social attitudes, lifestyle, education, health 	Onsite cultural interpretation along walking trail	\$10,575
12.45pm-1.15pm	Visit 'The Ranch'	<ul style="list-style-type: none"> Guided tour 	<ul style="list-style-type: none"> 1950-1960's history as camp housing Impact of the closure of the mission on local Aboriginal people Lifestyle of people brought up in these areas 	Parking for vehicles	\$29,900
				Walking tracks	\$11,000
				Landscaping	\$21,600

Time	Itinerary	Activity	Interpretive Themes	Infrastructure Support Required <i>(new infrastructure required to deliver the experience – physical, digital, transport)</i>	Infrastructure Costings
1.15pm-1.30pm	Travel by coach from Dimboola to Wail (15 minutes)				
1.30pm-3.00pm	Visit the Wail Nursery	<ul style="list-style-type: none"> • Tour conclusion 	<ul style="list-style-type: none"> • Final briefing and farewell at the conclusion of Bunjil’s Trail • Reflect on RAP progress and discuss the organisation’s future commitments to cultural learning and practising cultural protocols 	<ul style="list-style-type: none"> • Meeting room • Toilets • Carparking • Kitchenette • Landscaping 	Covered earlier
3.00pm-6.30pm	Travel by coach from Wail to Melbourne				

SOURCE: Street Ryan and Insight Communications Estimates (December 2016) using Industry Data and Quantity Surveying Estimates

6.2 Managing the Wotjobaluk Country Tourism Sites

Key organisations involved in the operation and maintenance of sites, in collaboration with BGLC, in which Wotjobaluk Country Tourism activities are proposed, include:

Mount Arapiles-Tooan State Park and District

- Parks Victoria
- West Wimmera Shire Council
- Horsham Rural City Council
- Harrow Discovery Centre and Johnny Mullagh Interpretive Centre

Wail Nursery

- Wail Nursery (BGLC's joint venture partner)
- Parks Victoria
- Horsham Rural City Council

Little Desert National Park and Little Desert Nature Lodge

- Parks Victoria
- Conservation Volunteers Australia
- Hindmarsh Shire Council

Bunjil's Songline Tour Route

- Brambuk Cultural Centre
- Parks Victoria
- Northern Grampians Shire Council
- Horsham Rural City Council
- Hindmarsh Shire Council
- Yarriambiack Shire Council.

Lake Tyrrell

- Buloke Shire Council
- Advance Sea Lake Inc.

The, currently, informally constituted group Wimmera Indigenous Tourism Group (WITG), which is overseeing the feasibility assessment stage of the project, could also be a future key organisation if its role is viewed as ongoing by the participants. This body could effectively represent all councils, Wimmera Development Association and some other stakeholder organisations in reaching agreement on management of sites (potentially reducing the number of formal agreements required). If the group is not continued, there is also a possibility that Wimmera Development Association could be empowered to enter into agreements on behalf of its constituent councils.

All sites in the proposed tourism product portfolio are within Wotjobaluk Country, and most are on public land (national and state parks) or other reserves. The key private sites, held through ownership or leasehold, are the Wail Nursery site (jointly owned by BGLC and to be fully owned within 3 years), the Ebenezer Mission, Little Desert Nature Lodge, Brambuk Cultural Centre and Harrow Discovery Centre. Among these key sites, the existing business owners will take control of capital development and assets in three cases:

- Little Desert Nature Lodge, where the owner/operator has confirmed strong interest in a working relationship with Wotjobaluk Country Tourism.
- Brambuk Cultural Centre, where a close working relationship is also expected.
- Harrow Discovery Centre, which is operated by a community based structure closely linked to West Wimmera Shire Council.

It is suggested that, should the tourism enterprise proceed, there is a need for Wotjobaluk Country Tourism/BGLC to enact 'collaborative enterprise agreements' with the three organisations which will have control of funded improvements to tourism assets to ensure responsibilities for the protection and maintenance of the assets is clear. Further, a Memorandum of Understanding should be developed and enacted with each of the local government authorities in Wotjobaluk Country (or Wimmera Development Association, as the councils' representative) and Parks Victoria, also to clarify responsibilities, not only for maintenance of assets but also for clarity on:

- Access to sites
- Security provisions
- Health and safety
- Crisis management
- Insurances.

It would be a reasonable expectation that Wotjobaluk Country Tourism should make an agreed financial or resourcing contribution to these asset management requirements, based on level of usage.

The following checklist is a guide to items which might be useful in both the suggested Collaborative Enterprise Agreements with business partners, and the Memoranda of Understanding with local councils. In both cases the agreements/understanding should also embrace the code of practice for expected cooperation.

- a. Assets and operations covered by the agreement/understanding.
- b. Responsibilities for maintenance, systems, and legal provisions associated with assets and operations.
- c. Entry and exit rules
 - Rules or cost for entry after the initial participants are in place
 - Payment or penalties for exit
 - Valuing the business, when taking on new entrants or partners.
- d. Quality standards to be met.
- e. Exclusivity of the agreement/understanding in tourism market segments or geographic area.
- f. Agreed disciplinary provisions (eg for poor quality, inability to meet maintenance schedules, breach of rules).
- g. Any joint committees and voting arrangements.

- h. Reporting and financial contributions, charges or levies.
- i. Information exchange.
- j. Dealing with assets and intellectual property, including:
 - Databases, market intelligence.
 - Brands and promotional programs and brands.
 - Knowledge, cultural wisdom, traditional stories, and know-how.
- k. Potential conflicts of interest.

7. FINANCIAL ASSESSMENT

7.1 Projection Assumptions

7.2 Financial Viability Projections

7.3 Other Potential Investment Opportunities

7.1 Projection Assumptions

Profit and loss and cash flow projections, over a time horizon of 5 years, are presented in this section to examine the potential viability of a Wotjobaluk Tourism Enterprise and the circumstances under which it could be viable. Three scenarios are presented. The projection scenarios encompass the range of tourism products identified in earlier sections. Tour operations are expected to be administered and coordinated from a BGLC administration and nursery hub complex at Wail.

Mount Arapiles – Tooan and Harrow District Tourism Activities

- Secondary school camps at Mount Arapiles-Tooan State Park. Wotjobaluk Tourism would provide Indigenous activities as part of 4-5 day camps organised by the schools or licensed tour operators. Tour guides would deliver activities on site bringing all required equipment.
- There is existing, and long established demand among Victorian public and independent secondary schools in conducting camps and excursions. It is estimated that around 15 Victorian schools run 3 to 5 day camps per year. There are also some South Australian schools and University groups (mountaineering clubs) that conduct regular camps at Mount Arapiles. As a result, the projection scenarios include:
 - Scenario 1: 5 schools participating in a Wotjobaluk tourism program annually (through arrangements with Indigicate (a licensed tour operator focused on delivering Indigenous cultural programs to schools) and/or Outdoor Education Australia)
 - Scenario 2: 10 schools in Year 1, increasing to 25 by year 5.
 - Scenario 3: 15 schools in Year 1, increasing to 35 by year 5.
- Wotjobaluk tours/programs for camping visitors at the State Park. There were 4,709 Parks Victoria reported overnight visitors in 2015-16 at Mount Arapiles – Tooan, staying a total of 15,915 nights. Little Desert National Park had 984 camping visitors in 2015-16 staying 1,788 nights. In both cases, it is assumed there were an additional 15% of camping visitors (covering sites where no fees are charged and where visitors did not register). Therefore, there was a total campers market of 5,415 in Mount Arapiles and 1,132 in Little Desert in 2015-16. Projection scenarios include:

- Scenario 1: 0% of campers participating in a ½ day Indigenous tour
- Scenario 2: 5% of campers participating in ½ day Indigenous tour in Year 3, increasing to 8% by Year 5
- Scenario 3: 5% of campers participating in ½ day Indigenous tour in Year 3, increasing to 10% by Year 5.

Cultural Tours and Ceremonies

- BGLC has an existing, on demand, program offering cultural interpreters (tour guides) and ceremonial activities (eg. Welcome to Country, smoking ceremonies, dancing) available for relevant activities, such as festivals, launches, community and corporate events, and school/educational groups.
- The range and frequency of existing ceremonies, events and tour activities currently conducted by BGLC, which would all be transferred to the new Wotjobaluk Tourism Enterprise, (or operated under the tourism business name, if a new entity is not created) are detailed in Table 7.1.
- Total income from these events in 2015-16 was approximately \$27,000, with a net-revenue (after costs) to BGLC of \$8,400.
- Pricing structures for cultural ceremonies and tours are:

○ Welcome to country	\$200
○ Smoking ceremonies	\$350
○ Dance performances	\$500 to \$700
○ Educational programs	Departmental Fixed Funding (\$10,000 per month)
○ Cultural awareness training/tour (½ day)	\$1,000
○ Cultural awareness training/tour (full day)	\$2,000.

Type of Ceremony or Event*	Brief Description	Frequency*
NAIDOC week	Welcome to country, tours of cultural/heritage properties/land	3
Green Army teams	Cultural presentation	1
BGLC Education program	Smoking ceremony and didgeridoo performance	13
Task Force 1000 (State)	Welcome to country	1
Birchip Landcare	Welcome to country and cultural presentation	1
Art Is... Festival	Welcome to country and smoking ceremony	1
Horsham Town Hall redevelopment opening	Welcome to country, smoking ceremony, and dance	1
Kindergarten	Didgeridoo performance and presentation	1
Yarrilinks (Landcare)	Smoking ceremony and performance/presentation	1
Visiting environment enthusiasts/group	Tour and presentation	1
A range of stakeholder groups	Cultural awareness training	10
Reconciliation Week	Welcomes to country, smoking ceremonies and dance	7
Lost in the Bush (The Jane Duff commemoration)	Welcome to country, smoking, dance and children's activities	1
Horsham Rural City Council Civic reception	Welcome to country, smoking ceremony and dance	1
Cultural wellbeing health event	Welcome to country	1
State Government forums, events	Welcomes to country	15
Other Landcare groups	Welcomes	10
St Malachy's school	Welcome, dance (part of the curriculum)	1
Various project launches	Welcomes to country	10
Scouts, Melbourne Arts group – presentation/activities	Presentations and cultural activities	1
Ebenezer Mission tours/entrance	Tours to the site and to the mission entrance	2

(left) Table 7.1: Cultural Ceremonies, Events and Tour - BGLC 2015-16

Source: BGLC

* The total of this column is accurate, while some of the individual event/ceremony frequencies are approximations

Market targets for cultural ceremonies and tours, as a function to be managed by the Wotjobaluk Country Tourism venture, used in the three projection scenarios are presented in Table 7.2.

Table 7.2: Market Targets Cultural Ceremonies and Tours (number)

Ceremony / Tour	Scenario 1		Scenario 2		Scenario 3	
	Year 1	Year 5	Year 1	Year 5	Year 1	Year 5
Welcome to Country	30	35	30	40	30	40
Smoking Ceremony	15	20	15	25	15	25
Dance Performance	15	20	15	30	15	30
Educational Programs	On request	On request	On request	On request	On request	On request
½ Day Cultural awareness/training /tour	15	20	20	30	20	30
1 Day Cultural awareness/training /tour	5	10	5	15	5	30

Bunjil's Songline Tour: Grampians and Wotjobaluk Country – Cultural Awareness Tours

- The initial target market for Bunjil's Songline tours is corporate groups based in the Wimmera-Mallee-Grampians region, Mildura, Melbourne, Adelaide and regional Victoria. The tour is designed to achieve corporate outcomes related to the development of a Reconciliation Action Plan.
- It is anticipated that targeting corporate groups, especially government agencies and not-for-profits in the local region in the first instance, is likely to be more affordable / viable than attracting the independent leisure travel market, which is a highly competitive tourism sector and involves significant investment when working with the travel trade, especially to attract international visitors. When the tourism business is more established and experienced, it may be feasible to develop tours for independent travellers.
- Growth in the number of businesses developing Reconciliation Action Plans by businesses is expected to provide the opportunities for the Bunjil's Songline Tour to both target these businesses and to offer training which helps in commencing the reconciliation action planning process. Currently more than 800 organisations in Australia are involved with Reconciliation Australia's RAP program. To date, 262,069 employees in Australia have completed cultural awareness training (source: RAP Impact Measurement Report, February 2016) as part of the RAP process¹.
- The proposed Songline Tour is an intensive program over 3 days, with activities running from 2pm on Day 1 to 3pm on Day 3 (including evening activities to 9 pm on Days 1 and 2). The tour will operate in cooperation with Brambuk and the Jardwadjali people of the Grampians National Park (Gariwerd) on Day 1 and through until lunch on Day 2.
- Market targets used in the projection scenarios are:
 - Scenario 1: 8 groups in Year 1 (average of 15 per group) increasing to 12 groups in Year 5
 - Scenario 2: 10 groups in Year 1 increasing to 15 groups in Year 5
 - Scenario 3: 10 groups in Year 1 increasing to 20 groups in Year 5. Scenario 3 also incorporates the potential for the tour to become a tour for leisure travellers, with an additional 5 leisure market groups being serviced from Year 3.
- Potential for self-guided leisure tours are captured in the mobile-app tour scenarios (separate tour component).

- The price structure for projection scenarios has been developed from a review of existing cultural awareness tours offered across Australia (in Victoria, New South Wales, Northern Territory and Western Australia – see Appendix C). The structure uses a fixed fee, but could be modelled to provide for a flexible fee per person scale.
 - Average group size 15
 - Price for the 3 day Songline Tour per group: \$15,000 (including meals and accommodation)

Little Desert Nature Lodge: Nature-based and Indigenous Cultural Tours

- The Little Desert Nature Lodge (LDNL) is currently undertaking a substantial renovation, which is also about repositioning the lodge as a Wimmera Mallee region "wild place" showcase (in line with the Wild West branding of Wimmera Mallee Tourism). LDNL will target a range of markets in 4 categories:
 - Domestic and international tourists (nature based, retirees and FITs), travellers and groups
 - Education Seekers and life-long learners
 - Voluntary Workers: in nature based tourism, environmental studies, hospitality, etc
 - Community (local and regional residents on personal and/or business day trips).
- LDNL and Wotjobaluk Tourism will develop collaborative packages with surrounding attractions and services, also in cooperation with Conservation Volunteers Australia and New Zealand (CVA).
- CVA is keen to establish a working relationship with Wotjobaluk Tourism to:
 - Contract Wotjobaluk Tourism/BGLC tour guides to deliver Indigenous and nature-based content as part of CVA/LDNL programs, possibly including tours, Welcome to Country ceremonies and dance performances. This could be extended to a larger range of tours if the tour guides have the capacity to deliver content on flora, fauna and CVA conservation programs, in addition to Indigenous cultural heritage)
 - Wotjobaluk Tourism could bring tours to the Lodge for accommodation and meeting spaces. This is factored into the Bunjil's Songline tour projections.

- Additional features of the relationship between LDNL and Wotjobaluk Tourism/BGLC include:
 - Bushfoods produced by BGLC (if developed as part of Wail Nursery) could supply LDNL for its menu.
 - LDNL could undertake catering for Tour products delivered by Wotjobaluk Tourism on and off-site.
 - LDNL as a registered training provider could service some of Wotjobaluk Tourism/BGLC’s training needs such as delivering and hosting courses including Risk Management, Governance, Conservation Land Management, and Health and Safety.
- Market targets associated with LDNL and CVA in the Wotjobaluk Tourism financial projections are detailed in Table 7.3.
- Pricing structures for these activities are consistent with the pricing outlined in other Wotjobaluk Tourism product areas (with provision for commissions and on-cost payments to LDNL and CVA).

Table 7.3: Market Targets for Nature-based and Indigenous Cultural Tours (in collaboration with LDNL and CVA)

Product	Scenario 1		Scenario 2		Scenario 3	
	Year 1	Year 5	Year 1	Year 5	Year 1	Year 5
Contract – Welcomes and dance	5	20	10	30	10	50
Half day cultural tours	5	25	5	30	10	40
Extended tours – cultural and nature	0	0	0	15	0	20
Bushfood products for LDNL/CVA catering (number of events)	0	0	0	0	10	50

Lake Tyrrell Boorong Night Sky Tours

- Lake Tyrrell has recently experienced an influx of Chinese visitors taking photos on the lake surface. This recent tourism phenomenon has been driven by both social media and word of mouth. Some Chinese tourism websites have named Lake Tyrrell as a key Australian tourist destination.
- During the day, visitors are attracted to Lake Tyrrell by the vastness of the natural landscape, and with a small amount of water on the lake bed, magical reflective photographs can be captured. The flat salt plain also allows tourists to film creative and perceptive scenes. At night, visitors are attracted to the spectacular star-studded night sky. With the lack of light pollution the conditions are ideal for star gazing and night photography. This night sky is an ideal environment to identify the Indigenous interpretations of astronomical features and patterns, and to describe Indigenous creation stories.
- It is understood that Indigenous experiences are a key point of differentiation for Australia, in a highly competitive international tourism market, and that a modest proportion of Chinese tourists have some level of interest in Indigenous tourism products.
- Offsetting these positive attributes of Lake Tyrrell are the lack of existing tourism infrastructure at the lake site and the poor provision of services for tourists at the nearby Sea Lake township. Visitation levels are also highly seasonal (August to November being the prime months) which may discourage investment¹.
- The estimated 2015 visitation to Lake Tyrrell was 42,000, of which 13% stayed overnight (about 5,500). In twelve months of 2015, traffic volumes to Lake Tyrrell have increased from 153 vehicles per day to 570 vehicles per day. The Lake Tyrrell Tourism Strategy advises that Lake Tyrrell appears to be attracting a mix of residents of Chinese origin (living in Melbourne) and inbound tourists. The local Chinese appear to be travelling in friendship groups or bringing their Chinese tourist friends and relatives to experience something different on their stay with them. Visitors tend to arrive by the car load, however bus groups have also started visiting the area. A small number of Chinese tour groups have started bringing group tours to Lake Tyrrell. Tours depart from Melbourne and stop at Bendigo on the way and return via Swan Hill.

¹ Lake Tyrrell Tourism Strategy, 2016

- Lake Tyrrell is within Wotjobaluk Country, but is too distant to be included in a practical tour itinerary with either the Bunjil's Songline Tours or from a base at Little Desert. However, BGLC, Buloke Shire Council and Wimmera Mallee Tourism are all enthusiastic about articulating the tourism product at Lake Tyrrell.
- The Lake Tyrrell Tourism Strategy suggests that visitation to the Lake could increase to 192,000 people per year within 10 years, with a doubling of existing peak visitation (Spring), a new peak being developed in Autumn, and visitation during off-peak periods not dropping below a third of the visitation experienced at peak periods. The number of overnight visitors (staying at Sea Lake) is projected to increase to 38,400 per annum, over the same period, subject to suitable investment and positive response by the local business community.
- The projection scenarios for Boorong Night Sky Tours/Interpretive Sessions at Lake Tyrrell include, provision for the product to be developed over time, in parallel with the provision of tourism infrastructure at the lake and associated accommodation and food service enhancement in Sea Lake:
 - Scenario 1: Commencement of Boorong Night Sky tours/interpretive sessions in Year 3 with 10 groups (averaging 15 participants during Spring), increasing to 25 groups by Year 5.
 - Scenario 2: Commencement of Boorong Night Sky tours/interpretive sessions in Year 2 with 10 groups (averaging 15 participants during Spring), increasing to 40 groups by Year 5 (in Spring and Autumn).
 - Scenario 3: Commencement of Boorong Night Sky tours/interpretive sessions in Year 2 with 15 groups (averaging 15 participants during Spring), increasing to 60 groups by Year 5 (in Spring and Autumn).
- Pricing used for the Boorong Night Sky tours/interpretive sessions in the financial projections is \$900 per group (including refreshments, but excluding travel to the lake).

Wotjobaluk Country Mobile App

- The visitor facilities and interpretive signage recommended at specific locations, and the Wotjobaluk Country mobile app, will service a wide variety of independent travellers in addition to the visitors on tour experiences delivered directly by Wotjobaluk Tourism.
- The direct operational revenue attributable to a Wotjobaluk Country Mobile App for self-guided tours will include fees for the initial development of the software and mapping system (although this would probably be an investment cost to BGLC, possibly covered by grant funds), and a small ongoing royalty.
- The number of annual self-drive visitors to the Wimmera Mallee region is currently 133,000¹. Assuming the average number of visitors per vehicle is 3.2, this represents a potential market of 2,100 visitors for the mobile app.
- The projections provide for a very small revenue from the mobile app. The assumption is a 15% royalty on the sale of each app sold to self-drive travellers during their visit, at a cost of \$10, based on usage levels of:
 - Scenario 1: 5% of self-drive tourists to the Wimmera Mallee Tourism region in Year 1 (105 vehicles) increasing to 20% by Year 5 (415 vehicles).
 - Scenario 2: 5% of self-drive tourists to the Wimmera Mallee Tourism region in Year 1 (105 vehicles) increasing to 30% by Year 5 (625 vehicles).
 - Scenario 3: 10% of self-drive tourists to the Wimmera Mallee Tourism region in Year 1 (210 vehicles) increasing to 30% by Year 5 (625 vehicles).

7.2 Financial Viability Projections

Detailed financial projections for the three Wotjobaluk Country Tourism enterprise scenarios are presented in Tables 7.4 to 7.6.

Note that the projections and estimates presented here have been derived from many assumptions/ events which could occur in the future. These financial estimates are based on targets, not guarantees or necessarily high probability events, Street Ryan and Insight Communications have prepared these estimates to show the possible outcomes of certain courses of action. Neither Street Ryan and Associates Pty Ltd nor Insight Communications, and their employees, accept responsibility for the accuracy of these projections and estimates nor for the consequences of any action taken by Barengi Gadjin Land Council, Wimmera Development Association, the Wimmera Indigenous Tourism Group or any other organisation or individual, as a result of the use or application of any financial estimates in this document.

Features and conclusions from each scenario include:

Scenario 1:

- Tourist services and revenue are consistent with the Scenario 1 projection assumptions in Section 7.1.
- Human resourcing in the cost of sales figures are based on existing rates of pay to elders, performers and casual staff of BGLC, with all tourism operations resourced by these casual arrangements, plus 3.2 full time equivalent permanent staff, including provision for multi-tasking within the BGLC organisation structure (with particular provision for the Tourism Enterprise sharing staff resources with Conservation and Land Management and Education Units of BGLC). Total staffing in this scenario would reach 4.5 full time equivalent jobs at Wotjobaluk Country Tourism by Year 5.
- Other cost of sales figures provide for meals or refreshments on all tourism products of at least half day duration and accommodation only for the Bunjil's Songline tours. Group transport is included for Mount Arapiles – Tooan State Park tours, cultural awareness/training and tours, and Bunjil's Songline Tours. It is assumed Little Desert Nature Lodge and independent providers at Lake Tyrrell would provide transport to those sites.

- Capital development costs of \$1,286,849 have been included as the investment in infrastructure and facilities associated with Wotjobaluk Country Tourism (with an assumption that this could be met through grant funds), comprised of the tourism administration and facilities at the Wail site, improvements at Mount Arapiles-Tooan State Park, and improvements at Bunjil's Songline tour sites. Although the infrastructure and capital development program detailed in Section 6 includes further items, at the Harrow and Lake Tyrrell, these are not included in the Wotjobaluk Country Tourism budget projections since they will be controlled by 'partner' organisations and, in some cases, are the subject of separate business case and strategy documents¹.
- Other operating expense estimates are in line with industry norms and averages.
- The scenario does not include provision for commercial finance loans and, therefore, no costs of finance (ie interest charges or repayment of capital) are included.
- This scenario produces a result which reveals:
 - Sales income of \$299,408 in Year 1 increasing to \$429,123 by Year 5.
 - Gross margins of 38.8% in Year 1 increasing to 40.5% by Year 5.
 - Net profit of -36.2% in Year 1 improving to -11.7% by Year 5.
 - The venture is not viable at the projected level of demand in this scenario, with net losses projected through until beyond Year 5. Cash flows are also negative throughout the first 5 years.
 - The level of activity and sales of tourism services in this scenario are considered achievable, with a strong focus on the tourism enterprise by BGLC, commitment from local Indigenous participants in developing guiding skills and in giving visitors a memorable experience, and by the development of workable alliances with the identified collaborative partners throughout the region. However, the achievement of the level of sales in this scenario is insufficient to sustain the enterprise during its first five years, and would need to be subsidised or supported by an external funding body.
 - The scenario has an internal rate of return of -15% over ten years (assuming no costs of finance), which reflects the negative cash flows compared with the substantial capital investment to establish the venture.

¹ Note: There could be additional capital and infrastructure costs directly attributed to Wotjobaluk Country Tours, which will impact on the internal rate of return calculations in the projections. Although many of the assets will serve multiple purposes, and the allocated \$1.287 million provides a challenging level of investment to recoup a respectable return.

Scenario 2:

- Tourist services and revenue are consistent with the Scenario 2 projection assumptions in Section 7.1.
- Human resourcing in the cost of sales figures are based on existing rates of pay to elders, performers and casual staff of BGLC, with all tourism operations resourced by these casual arrangements, plus 3.2 full time equivalent permanent staff, including provision for multi-tasking within the BGLC organisation structure (with particular provision for the Tourism Enterprise sharing staff resources with Conservation and Land Management and Education Units of BGLC). Total staffing in this scenario would reach 4.9 full time equivalent jobs at Wotjobaluk Country Tourism by Year 5.
- Other cost of sales figures provide for meals or refreshments on all tourism products of at least half day duration and accommodation only for the Bunjil's Songline tours. Group transport is included for Mount Arapiles – Tooan State Park tours, cultural awareness/training and tours, and Bunjil's Songline Tours. It is assumed Little Desert Nature Lodge and independent providers at Lake Tyrrell would provide transport to those sites.
- Capital development costs of \$1,286,849 have been included as the investment in infrastructure and facilities associated with Wotjobaluk Country Tourism (with an assumption that this could be met through grant funds), comprised of the tourism administration and facilities at the Wail site, improvements at Mount Arapiles – Tooan State Park, and improvements at Bunjil's Songline tour sites. Although the infrastructure and capital development program detailed in Section 6 includes further items, at the Harrow and Lake Tyrrell, these are not included in the Wotjobaluk Country Tourism budget projections since they will be controlled by 'partner' organisations and, in some cases, are the subject of separate business case and strategy documents.
- Other operating expense estimates are in line with industry norms and averages.
- The scenario does not include provision for commercial finance loans and, therefore, no costs of finance (ie interest charges or repayment of capital) are included.

This scenario produces a result which reveals:

- Sales income of \$343,408 in Year 1 increasing to \$601,638 by Year 5.
- Gross margins of 40.6% in Year 1 remaining relatively stable at 39.7% by Year 5.
- Net profit of -25.5% in Year 1 improving to 9.5% by Year 5.
- The venture is viable at the projected level of demand in this scenario, with net surpluses projected from Year 2 and beyond, and net profit after Year 3. However, it would require an additional cash injection from its parent organisation or an external source, in order to meet cash shortfalls during the first year of operation.
- The level of activity and sales of tourism services in this scenario is considered ambitious and at the 'best practice' end of performance for an Indigenous tourism enterprise in Victoria. Its achievement would require a strong focus on the tourism enterprise by BGLC personnel, the commitment of local Indigenous participants in developing guiding skills and in giving visitors a memorable experience, and by the development of meaningful and mutually beneficial alliances with the identified collaborative partners throughout the region.
- The scenario has an internal rate of return of -6% over ten years (assuming no costs of finance), which reflects the modest cash flow surpluses in the early years compared with the substantial capital investment to establish the venture.

Scenario 3:

- Tourist services and revenue are consistent with the Scenario 3 projection assumptions in Section 7.1.
- Human resourcing in the cost of sales figures are based on existing rates of pay to elders, performers and casual staff of BGLC, with all tourism operations resourced by these casual arrangements, plus 3.2 full time equivalent permanent staff, including provision for multi-tasking within the BGLC organisation structure (with particular provision for the Tourism Enterprise sharing staff resources with Conservation and Land Management and Education Units of BGLC). Total staffing in this scenario would reach 5.4 full time equivalent jobs at Wotjobaluk Country Tourism by Year 5.

- Other cost of sales figures provide for meals or refreshments on all tourism products of at least half day duration and accommodation only for the Bunjil's Songline tours. Group transport is included for Mount Arapiles – Tooan State Park tours, cultural awareness/training and tours, and Bunjil's Songline Tours. It is assumed Little Desert Nature Lodge and independent providers at Lake Tyrrell would provide transport to those sites.
- Capital development costs of \$1,286,849 have been included as the investment in infrastructure and facilities associated with Wotjobaluk Country Tourism (with an assumption that this could be met through grant funds), comprised of the tourism administration and facilities at the Wail site, improvements at Mount Arapiles-Tooan State Park, and improvements at Bunjil's Songline tour sites. Although the infrastructure and capital development program detailed in Section 6 includes further items, at the Harrow and Lake Tyrrell, these are not included in the Wotjobaluk Country Tourism budget projections since they will be controlled by 'partner' organisations and, in some cases, are the subject of separate business case and strategy documents.
- Other operating expense estimates are in line with industry norms and averages.
- The scenario does not include provision for commercial finance loans and, therefore, no costs of finance (ie interest charges or repayment of capital) are included.
- This scenario produces a result which reveals:
 - Sales income of \$363,065 in Year 1 increasing to \$882,988 by Year 5.
 - Gross margins of 38.9% in Year 1 increasing to 40.7% by Year 5.
 - Net profit of -19.3% in Year 1 improving to 24.5% by Year 5.
 - The venture is viable at the projected level of demand in this scenario, with net surpluses projected from the fourth quarter of Year 1 and beyond, and net profit after Year 2. An additional cash

- The level of activity and sales of tourism services in this scenario is considered both highly ambitious and without precedent for Indigenous tourism enterprises in Victoria. It could only be achieved with a very strong focus on the tourism enterprise by BGLC personnel at all levels, and by the development of meaningful and mutually beneficial alliances with the identified collaborative partners throughout the region, and with other supply chain organisations.
- The scenario has an internal rate of return of 8% over ten years (assuming no costs of finance), which is an attractive return for the capital investment involved in establishing the venture.

Table 7.4 Wotjobaluk Country Tourism: Financial Projection Scenario 1

Scenario 1:		Year 1								
		First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
TOURISM SALES UNITS										
Mount Arapiles-Tooan State Park										
Secondary School Groups	3 hours	0	2	0	3	5	5	5	5	5
Camping Groups	3 hours	0	0	0	0	0	0	0	0	0
Cultural Tours and Ceremonies										
Welcome to Country		8	8	6	8	30	32	33	35	35
Smoking Ceremony		4	4	3	4	15	16	18	19	20
Dance Performance		4	4	3	4	15	16	18	19	20
Educational Programs		5	5	5	5	20	20	20	20	20
½ Day Cultural awareness/training/tour		2	5	3	5	15	16	18	19	20
1 Day Cultural awareness/training/tour		0	2	1	2	5	6	8	9	10
Bunjil's Songline Tours										
Songline Tours - Corporate and RAP related		0	3	2	3	8	9	10	11	12
Songline Tours - Leisure market		0	0	0	0	0	0	0	0	0
Little Desert Nature Base Cultural Tours										
Contract - Welcomes and dance		0	2	1	2	5	10	14	17	20
Half day cultural tours		0	2	1	2	5	10	15	20	25
Extended tours - cultural and nature		0	0	0	0	0	0	0	0	0
Bushfood products for LDNL/CVA catering (number of events)		0	0	0	0	0	0	0	0	0
Lake Tyrrell Boorong Night Sky Tours		0	0	0	0	0	0	10	18	25
Wotjobaluk Country Mobile App	2,100	0	42	21	42	105	168	252	336	415

Table 7.4 (continued) Wotjobaluk Country Tourism: Financial Projection Scenario 1

TOURISM SALES VALUE	Unit Value (\$)	First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
Mount Arapiles-Tooan State Park										
Secondary School Groups (2 x 25)	\$700 per group	\$0	\$2,800	\$0	\$4,200	\$7,000	\$7,000	\$7,000	\$7,000	\$7,000
Camping Groups (15)	\$800 per group	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Cultural Tours and Ceremonies										
Welcome to Country	\$200	\$1,600	\$1,600	\$1,200	\$1,600	\$6,000	\$6,400	\$6,600	\$7,000	\$7,000
Smoking Ceremony	\$350	\$1,400	\$1,400	\$1,050	\$1,400	\$5,250	\$5,600	\$6,300	\$6,650	\$7,000
Dance Performance	\$600	\$2,400	\$2,400	\$1,800	\$2,400	\$9,000	\$9,600	\$10,800	\$11,400	\$12,000
Educational Programs	\$10,000	\$30,000	\$30,000	\$30,000	\$30,000	\$120,000	\$120,000	\$120,000	\$120,000	\$120,000
½ Day Cultural awareness/training/tour	\$1,000	\$2,000	\$5,000	\$3,000	\$5,000	\$15,000	\$16,000	\$18,000	\$19,000	\$20,000
1 Day Cultural awareness/training/tour	\$2,000	\$0	\$4,000	\$2,000	\$4,000	\$10,000	\$12,000	\$16,000	\$18,000	\$20,000
Bunjil's Songline Tours										
Songline Tours - Corporate and RAP related	\$15,000	\$0	\$45,000	\$30,000	\$45,000	\$120,000	\$135,000	\$150,000	\$165,000	\$180,000
Songline Tours - Leisure market	\$15,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Little Desert Nature Base Cultural Tours										
Contract - Welcomes and dance	\$400	\$0	\$800	\$400	\$800	\$2,000	\$4,000	\$5,600	\$6,800	\$8,000
Half day cultural tours	\$1,000	\$0	\$2,000	\$1,000	\$2,000	\$5,000	\$10,000	\$15,000	\$20,000	\$25,000
Extended tours - cultural and nature	\$1,650	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Bushfood products for LDNL/CVA catering (number of events)	\$15 x 50 persons	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Lake Tyrrell Boorong Night Sky Tours	\$900	\$0	\$0	\$0	\$0	\$0	\$0	\$9,000	\$16,200	\$22,500
Wotjobaluk Country Mobile App	15% of \$10	\$0	\$63	\$32	\$63	\$158	\$252	\$378	\$504	\$623
TOTAL Sales Income		\$37,400	\$95,063	\$70,482	\$96,463	\$299,408	\$325,852	\$364,678	\$397,554	\$429,123

Table 7.4 (continued) Wotjobaluk Country Tourism: Financial Projection Scenario 1

Other Income	First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
Loans and Grants	\$1,334,980	\$0	\$0	\$0	\$1,334,980	\$0	\$0	\$0	\$0
Investor Contributions	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL INCOME	\$1,372,380	\$95,063	\$70,482	\$96,463	\$1,634,388	\$325,852	\$364,678	\$397,554	\$429,123
Cost of Sales									
Payments to Elders/Ceremonial Presenters/Dancers	\$4,200	\$4,500	\$3,300	\$4,500	\$16,500	\$18,300	\$20,550	\$22,050	\$23,250
Payments to Casual Guides and Educators	\$3,200	\$8,400	\$6,500	\$8,400	\$26,500	\$28,300	\$31,300	\$33,820	\$36,250
Commissions/fees to partner organisations	\$0	\$11,530	\$7,640	\$11,530	\$30,700	\$35,150	\$39,560	\$43,930	\$48,300
Meals and refreshments on tour	\$100	\$5,310	\$3,360	\$5,380	\$14,150	\$16,110	\$18,730	\$21,050	\$23,325
Vehicle operating expenses (bus)	\$366	\$3,843	\$2,135	\$4,026	\$10,370	\$11,529	\$13,237	\$14,396	\$15,555
Accommodation	\$0	\$6,750	\$4,500	\$6,750	\$18,000	\$20,250	\$22,500	\$24,750	\$27,000
Total Cost of Sales	\$7,866	\$40,333	\$27,435	\$40,586	\$116,220	\$129,639	\$145,877	\$159,996	\$173,680
GROSS PROFIT	\$1,364,514	\$54,730	\$43,047	\$55,877	\$1,528,168	\$196,213	\$218,801	\$237,558	\$255,443
OPERATING EXPENSES									
Accountancy and auditing	\$800	\$0	\$0	\$500	\$1,300	\$1,500	\$1,500	\$1,500	\$1,500
Marketing	\$358	\$358	\$358	\$358	\$1,432	\$4,300	\$4,300	\$4,300	\$4,300
Bank Fees	\$2,370	\$190	\$141	\$193	\$2,894	\$472	\$549	\$615	\$678
Capital development and equipment purchases	\$1,147,465	\$0	\$0	\$0	\$1,147,465	\$0	\$0	\$0	\$0
Interest payments	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Certifications and accreditations	\$3,500	\$0	\$0	\$0	\$3,500	\$3,780	\$4,082	\$4,409	\$4,762
Insurance	\$10,500	\$0	\$0	\$0	\$10,500	\$10,731	\$10,967	\$11,208	\$11,455
Equipment and Building Maintenance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Motor Vehicle Running Costs	\$1,050	\$1,050	\$1,050	\$1,050	\$4,200	\$12,600	\$12,600	\$12,600	\$12,600
Postage, Printing, Stationery	\$167	\$167	\$167	\$167	\$667	\$2,000	\$2,000	\$2,000	\$2,000

Table 7.4 (continued) Wotjobaluk Country Tourism: Financial Projection Scenario 1

		First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
Management/Administration Wages	@10%	\$1,625	\$1,625	\$1,625	\$1,625	\$6,500	\$6,630	\$6,763	\$6,898	\$7,036
Tour Guides	\$45,000 average FTE	\$11,250	\$22,500	\$22,500	\$22,500	\$78,750	\$80,719	\$82,737	\$84,805	\$86,925
Educational and Cultural Heritage Staff	\$53,000 average FTE	\$17,225	\$17,225	\$17,225	\$17,225	\$68,900	\$70,623	\$72,388	\$74,198	\$76,053
Superannuation		\$2,860	\$3,928	\$3,928	\$3,928	\$14,644	\$15,007	\$15,379	\$15,761	\$16,151
Workers Compensation		\$699	\$1,045	\$1,005	\$1,045	\$3,794	\$3,912	\$4,057	\$4,194	\$4,332
Telephone, IT and Utilities		\$1,050	\$2,250	\$1,500	\$2,100	\$6,900	\$7,038	\$7,179	\$7,322	\$7,469
Travelling		\$180	\$180	\$180	\$180	\$720	\$2,200	\$2,200	\$2,200	\$2,200
TOTAL EXPENSES		\$1,388,988	\$50,518	\$49,679	\$50,871	\$1,540,055	\$221,691	\$226,881	\$232,190	\$237,640
SURPLUS/DEFICIT		-\$24,474	\$4,212	-\$6,632	\$5,006	-\$21,888	-\$25,478	-\$8,080	\$5,368	\$17,802
CUMULATIVE SURPLUS/DEFICIT		-\$24,474	-\$20,262	-\$26,894	-\$21,888		-\$47,366	-\$55,446	-\$50,078	-\$32,276
PROFIT AND LOSS ADJUSTMENTS										
Sales Income		\$37,400	\$95,063	\$70,482	\$96,463	\$299,408	\$325,852	\$364,678	\$397,554	\$429,123
Cost of Sales		\$7,866	\$40,333	\$27,435	\$40,586	\$116,220	\$129,639	\$145,877	\$159,996	\$173,680
Operating Expenses		\$54,008	\$50,518	\$49,679	\$50,871	\$205,075	\$221,691	\$226,881	\$232,190	\$237,640
Depreciation		\$22,173	\$21,813	\$21,459	\$21,110	\$86,555	\$83,067	\$77,668	\$72,620	\$67,899
NET PROFIT (before taxation)		-\$46,648	-\$17,601	-\$28,091	-\$16,103	-\$108,443	- \$108,545	-\$85,748	-\$67,252	-\$50,097
Internal Rate of Return (10 years)	-15%									

Table 7.5 Wotjobaluk Country Tourism: Financial Projection Scenario 2

Scenario 2:		First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
TOURISM SALES UNITS										
Mount Arapiles-Tooan State Park										
Secondary School Groups	3 hours	0	4	0	6	10	15	18	20	25
Camping Groups	3 hours	0	0	0	0	0	0	18	23	29
Cultural Tours and Ceremonies										
Welcome to Country		8	8	6	8	30	32	35	38	40
Smoking Ceremony		4	4	3	4	15	17	20	22	25
Dance Performance		4	4	3	4	15	21	24	27	30
Educational Programs		5	5	5	5	20	20	20	20	20
½ Day Cultural awareness/training/tour		2	8	3	7	20	23	26	28	30
1 Day Cultural awareness/training/tour		0	2	1	2	5	7	10	12	15
Bunjil's Songline Tours										
Songline Tours - Corporate and RAP related		0	4	2	4	10	11	12	14	15
Songline Tours - Leisure market		0	0	0	0	0	0	0	0	0
Little Desert Nature Base Cultural Tours										
Contract - Welcomes and dance		0	4	2	4	10	15	20	25	30
Half day cultural tours		0	2	1	2	5	9	14	25	30
Extended tours - cultural and nature		0	0	0	0	0	4	8	10	15
Bushfood products for LDNL/CVA catering (number of events)		0	0	0	0	0	0	0	0	0
Lake Tyrrell Boorong Night Sky Tours		0	0	0	0	0	10	20	30	40
Wotjobaluk Country Mobile App	2,100	0	42	21	42	105	252	399	525	625

Table 7.5 (continued) Wotjobaluk Country Tourism: Financial Projection Scenario 2

TOURISM SALES VALUE	Unit Value (\$)	First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
Mount Arapiles-Tooan State Park										
Secondary School Groups (2 x 25)	\$700 per group	\$0	\$5,600	\$0	\$8,400	\$14,000	\$21,000	\$25,200	\$28,000	\$35,000
Camping Groups (15)	\$800 per group	\$0	\$0	\$0	\$0	\$0	\$0	\$14,400	\$18,400	\$23,200
Cultural Tours and Ceremonies										
Welcome to Country	\$200	\$1,600	\$1,600	\$1,200	\$1,600	\$6,000	\$6,400	\$7,000	\$7,600	\$8,000
Smoking Ceremony	\$350	\$1,400	\$1,400	\$1,050	\$1,400	\$5,250	\$5,950	\$7,000	\$7,700	\$8,750
Dance Performance	\$600	\$2,400	\$2,400	\$1,800	\$2,400	\$9,000	\$12,600	\$14,400	\$16,200	\$18,000
Educational Programs	\$10,000	\$30,000	\$30,000	\$30,000	\$30,000	\$120,000	\$120,000	\$120,000	\$120,000	\$120,000
½ Day Cultural awareness/training/tour	\$1,000	\$2,000	\$8,000	\$3,000	\$7,000	\$20,000	\$23,000	\$26,000	\$28,000	\$30,000
1 Day Cultural awareness/training/tour	\$2,000	\$0	\$4,000	\$2,000	\$4,000	\$10,000	\$14,000	\$20,000	\$24,000	\$30,000
Bunjil's Songline Tours										
Songline Tours - Corporate and RAP related	\$15,000	\$0	\$60,000	\$30,000	\$60,000	\$150,000	\$165,000	\$180,000	\$210,000	\$225,000
Songline Tours - Leisure market	\$15,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Little Desert Nature Base Cultural Tours										
Contract - Welcomes and dance	\$400	\$0	\$1,600	\$800	\$1,600	\$4,000	\$6,000	\$8,000	\$10,000	\$12,000
Half day cultural tours	\$1,000	\$0	\$2,000	\$1,000	\$2,000	\$5,000	\$9,000	\$14,000	\$25,000	\$30,000
Extended tours - cultural and nature	\$1,650	\$0	\$0	\$0	\$0	\$0	\$6,600	\$13,200	\$16,500	\$24,750
Bushfood products for LDNL/CVA catering (number of events)	\$15 x 50 persons	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Lake Tyrrell Boorong Night Sky Tours										
	\$900	\$0	\$0	\$0	\$0	\$0	\$9,000	\$18,000	\$27,000	\$36,000
Wotjobaluk Country Mobile App										
	15% of \$10	\$0	\$63	\$32	\$63	\$158	\$378	\$599	\$788	\$938
TOTAL Sales Income		\$37,400	\$116,663	\$70,882	\$118,463	\$343,408	\$398,928	\$467,799	\$539,188	\$601,638

Table 7.5 (continued) Wotjobaluk Country Tourism: Financial Projection Scenario 2

Other Income	First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
Loans and Grants	\$1,334,980	\$0	\$0	\$0	\$1,334,980	\$0	\$0	\$0	\$0
Investor Contributions	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL INCOME	\$1,334,980	\$116,663	\$70,882	\$118,463	\$1,678,388	\$398,928	\$467,799	\$539,188	\$601,638
Cost of Sales									
Payments to Elders/Ceremonial Presenters/Dancers	\$4,200	\$4,800	\$3,450	\$4,800	\$17,250	\$21,600	\$25,050	\$28,200	\$31,500
Payments to Casual Guides and Educators	\$3,200	\$10,200	\$6,500	\$10,100	\$30,000	\$33,760	\$37,720	\$42,550	\$46,575
Commissions/fees to partner organisations	\$0	\$15,360	\$7,680	\$15,360	\$38,400	\$43,410	\$48,520	\$57,650	\$62,925
Meals and refreshments on tour	\$100	\$7,100	\$3,360	\$7,190	\$17,750	\$21,050	\$25,140	\$30,065	\$33,848
Vehicle operating expenses (bus)	\$366	\$5,368	\$2,135	\$5,551	\$13,420	\$16,226	\$22,326	\$25,925	\$30,012
Accommodation	\$0	\$9,000	\$4,500	\$9,000	\$22,500	\$24,750	\$27,000	\$31,500	\$33,750
Total Cost of Sales	\$7,866	\$51,828	\$27,625	\$52,001	\$139,320	\$160,796	\$185,756	\$215,890	\$238,610
GROSS PROFIT	\$1,364,514	\$64,835	\$43,257	\$66,462	\$1,539,068	\$238,132	\$282,043	\$323,298	\$363,028
OPERATING EXPENSES									
Accountancy and auditing	\$800	\$0	\$0	\$500	\$1,300	\$1,500	\$1,500	\$1,500	\$1,500
Marketing	\$358	\$358	\$358	\$358	\$1,432	\$4,300	\$4,300	\$4,300	\$4,300
Bank Fees	\$2,370	\$233	\$142	\$237	\$2,982	\$798	\$936	\$1,078	\$1,203
Capital development and equipment purchases	\$1,147,465	\$0	\$0	\$0	\$1,147,465	\$0	\$0	\$0	\$0
Interest payments	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Certifications and accreditations	\$3,500	\$0	\$0	\$0	\$3,500	\$3,780	\$4,082	\$4,409	\$4,762
Insurance	\$10,500	\$0	\$0	\$0	\$10,500	\$10,731	\$10,967	\$11,208	\$11,455
Equipment and Building Maintenance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Table 7.5 (continued) Wotjobaluk Country Tourism: Financial Projection Scenario 2

		First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
Motor Vehicle Running Costs		\$1,050	\$1,050	\$1,050	\$1,050	\$4,200	\$12,600	\$12,600	\$12,600	\$12,600
Postage, Printing, Stationery		\$167	\$167	\$167	\$167	\$667	\$2,000	\$2,000	\$2,000	\$2,000
Marketing and Administration Wages	@10%	\$1,625	\$1,625	\$1,625	\$1,625	\$6,500	\$6,630	\$6,763	\$6,898	\$7,036
Tour Guides	\$45,000 average FTE	\$11,250	\$22,500	\$22,500	\$22,500	\$78,750	\$80,719	\$82,737	\$84,805	\$86,925
Educational and Cultural Heritage Staff	\$53,000 average FTE	\$17,225	\$17,225	\$17,225	\$17,225	\$68,900	\$70,623	\$72,388	\$74,198	\$76,053
Superannuation		\$2,860	\$3,928	\$3,928	\$3,928	\$14,644	\$15,007	\$15,379	\$15,761	\$16,151
Workers Compensation		\$699	\$1,083	\$1,005	\$1,080	\$3,867	\$4,026	\$4,192	\$4,377	\$4,548
Telephone, IT and Utilities		\$1,050	\$2,250	\$1,500	\$2,100	\$6,900	\$7,038	\$7,179	\$7,322	\$7,469
Travelling		\$180	\$180	\$180	\$180	\$720	\$2,200	\$2,200	\$2,200	\$2,200
TOTAL EXPENSES		\$1,388,988	\$50,599	\$49,680	\$50,950	\$1,540,217	\$221,952	\$227,222	\$232,657	\$238,202
SURPLUS/DEFICIT		-\$24,474	\$14,236	-\$6,423	\$15,512	-\$1,149	\$16,180	\$54,820	\$90,641	\$124,826
CUMULATIVE SURPLUS/DEFICIT		-\$24,474	-\$10,238	-\$16,661	-\$1,149		\$15,031	\$69,851	\$160,492	\$285,318
PROFIT AND LOSS ADJUSTMENTS										
Sales Income		\$37,400	\$116,663	\$70,882	\$118,463	\$343,408	\$398,928	\$467,799	\$539,188	\$601,638
Cost of Sales		\$7,866	\$51,828	\$27,625	\$52,001	\$139,320	\$160,796	\$185,756	\$215,890	\$238,610
Operating Expenses		\$54,008	\$50,599	\$49,680	\$50,950	\$205,237	\$221,952	\$227,222	\$232,657	\$238,202
Depreciation		\$22,173	\$21,813	\$21,459	\$21,110	\$86,555	\$83,067	\$77,668	\$72,620	\$67,899
NET PROFIT (before taxation)		-\$46,648	-\$7,577	-\$27,882	-\$5,598	-\$87,704	-\$66,887	-\$22,848	\$18,021	\$56,927
Internal Rate of Return (10 years)	-6%									

Table 7.6 Wotjobaluk Country Tourism: Financial Projection Scenario 3

		First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
TOURISM SALES UNITS										
Mount Arapiles-Tooan State Park										
Secondary School Groups	3 hours	0	6	0	9	15	20	25	30	35
Camping Groups	3 hours	0	0	0	0	0	0	18	28	36
Cultural Tours and Ceremonies										
Welcome to Country		8	8	6	8	30	32	35	38	40
Smoking Ceremony		4	4	3	4	15	17	20	22	25
Dance Performance		4	4	3	4	15	21	24	27	30
Educational Programs		5	5	5	5	20	20	20	20	20
½ Day Cultural awareness/training/tour		2	8	3	7	20	23	26	28	30
1 Day Cultural awareness/training/tour		0	2	1	2	5	15	20	25	30
Bunjil's Songline Tours										
Songline Tours - Corporate and RAP related		0	4	2	4	10	12	15	18	20
Songline Tours - Leisure market		0	0	0	0	0	0	5	5	5
Little Desert Nature Based Cultural Tours										
Contract - Welcomes and dance		0	4	2	4	10	18	30	42	50
Half day cultural tours		1	4	1	4	10	14	24	33	40
Extended tours - cultural and nature		0	0	0	0	0	10	15	17	20
Bushfood products for LDNL/CVA catering (number of events)		0	5	0	5	10	20	30	40	50
Lake Tyrrell Astronomy Tours		0	0	0	0	0	15	30	45	60
Wotjobaluk Country Mobile App	2,100	0	84	42	84	210	300	415	540	625

Table 7.6 (continued) Wotjobaluk Country Tourism: Financial Projection Scenario 3

TOURISM SALES VALUE	Unit Value (\$)	First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
Mount Arapiles-Tooan State Park										
Secondary School Groups (2 x 25)	\$700 per group	\$0	\$8,400	\$0	\$12,600	\$21,000	\$28,000	\$35,000	\$42,000	\$49,000
Camping Groups (15)	\$800 per group	\$0	\$0	\$0	\$0	\$0	\$0	\$14,400	\$22,400	\$28,800
Cultural Tours and Ceremonies										
Welcome to Country	\$200	\$1,600	\$1,600	\$1,200	\$1,600	\$6,000	\$6,400	\$7,000	\$7,600	\$8,000
Smoking Ceremony	\$350	\$1,400	\$1,400	\$1,050	\$1,400	\$5,250	\$5,950	\$7,000	\$7,700	\$8,750
Dance Performance	\$600	\$2,400	\$2,400	\$1,800	\$2,400	\$9,000	\$12,600	\$14,400	\$16,200	\$18,000
Educational Programs	\$10,000	\$30,000	\$30,000	\$30,000	\$30,000	\$120,000	\$120,000	\$120,000	\$120,000	\$120,000
½ Day Cultural awareness/training/tour	\$1,000	\$2,000	\$8,000	\$3,000	\$7,000	\$20,000	\$23,000	\$26,000	\$28,000	\$30,000
1 Day Cultural awareness/training/tour	\$2,000	\$0	\$4,000	\$2,000	\$4,000	\$10,000	\$30,000	\$40,000	\$50,000	\$60,000
Bunjil's Songline Tours										
Songline Tours - Corporate and RAP related	\$15,000	\$0	\$60,000	\$30,000	\$60,000	\$150,000	\$180,000	\$225,000	\$270,000	\$300,000
Songline Tours - Leisure market	\$15,000	\$0	\$0	\$0	\$0	\$0	\$0	\$75,000	\$75,000	\$75,000
Little Desert Nature Based Cultural Tours										
Contract - Welcomes and dance	\$400	\$0	\$1,600	\$800	\$1,600	\$4,000	\$7,200	\$12,000	\$16,800	\$20,000
Half day cultural tours	\$1,000	\$1,000	\$4,000	\$1,000	\$4,000	\$10,000	\$14,000	\$24,000	\$33,000	\$40,000
Extended tours - cultural and nature	\$1,650	\$0	\$0	\$0	\$0	\$0	\$16,500	\$24,750	\$28,050	\$33,000
Bushfood products for LDNL/CVA catering (number of events)	\$15 x 50 persons	\$0	\$3,750	\$0	\$3,750	\$7,500	\$15,000	\$22,500	\$30,000	\$37,500
Lake Tyrrell Boorong Night Sky Tours										
	\$900	\$0	\$0	\$0	\$0	\$0	\$13,500	\$27,000	\$40,500	\$54,000
Wotjobaluk Country Mobile App	15% of \$10	\$0	\$126	\$63	\$126	\$315	\$450	\$623	\$810	\$938
TOTAL Sales Income		\$38,400	\$125,276	\$70,913	\$128,476	\$363,065	\$472,600	\$674,673	\$788,060	\$882,988

Table 7.6 (continued) Wotjobaluk Country Tourism: Financial Projection Scenario 3

Other Income	First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
Loans and Grants	\$1,334,980	\$0	\$0	\$0	\$1,334,980	\$0	\$0	\$0	\$0
Investor Contributions	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL INCOME	\$1,373,380	\$125,276	\$70,913	\$128,476	\$1,698,045	\$472,600	\$674,673	\$788,060	\$882,988
Cost of Sales									
Payments to Elders/Ceremonial Presenters/Dancers	\$4,200	\$4,800	\$3,450	\$4,800	\$17,250	\$22,050	\$26,550	\$30,750	\$34,500
Payments to Casual Guides and Educators	\$3,200	\$10,200	\$6,500	\$10,100	\$30,000	\$38,300	\$53,775	\$61,155	\$67,200
Commissions/fees to partner organisations	\$100	\$15,560	\$7,680	\$15,560	\$38,900	\$48,770	\$81,075	\$94,035	\$103,050
Meals and refreshments on tour	\$150	\$7,340	\$3,360	\$7,500	\$18,350	\$25,150	\$40,758	\$48,198	\$54,040
Vehicle operating expenses (bus)	\$366	\$5,734	\$2,135	\$6,100	\$14,335	\$20,679	\$32,147	\$38,918	\$44,713
Accommodation	\$0	\$9,000	\$4,500	\$9,000	\$22,500	\$27,000	\$45,000	\$51,750	\$56,250
Total Cost of Sales	\$8,016	\$52,634	\$27,625	\$53,060	\$141,335	\$181,949	\$279,305	\$324,806	\$359,753
GROSS PROFIT	\$1,365,364	\$72,642	\$43,288	\$75,416	\$1,556,710	\$290,651	\$395,368	\$463,255	\$523,235
OPERATING EXPENSES									
Accountancy and auditing	\$800	\$0	\$0	\$500	\$1,300	\$1,500	\$1,500	\$1,500	\$1,500
Marketing	\$358	\$358	\$358	\$358	\$1,432	\$4,300	\$4,300	\$4,300	\$4,300
Bank Fees	\$2,372	\$251	\$142	\$257	\$3,021	\$945	\$1,349	\$1,576	\$1,766
Capital development and equipment purchases	\$1,147,465	\$0	\$0	\$0	\$1,147,465	\$0	\$0	\$0	\$0
Interest payments	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Certifications and accreditations	\$3,500	\$0	\$0	\$0	\$3,500	\$3,780	\$4,082	\$4,409	\$4,762
Insurance	\$10,500	\$0	\$0	\$0	\$10,500	\$10,731	\$10,967	\$11,208	\$11,455
Equipment and Building Maintenance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Motor Vehicle Running Costs	\$1,050	\$1,050	\$1,050	\$1,050	\$4,200	\$12,600	\$12,600	\$12,600	\$12,600
Postage, Printing, Stationery	\$167	\$167	\$167	\$167	\$667	\$2,000	\$2,000	\$2,000	\$2,000

Table 7.6 (continued) Wotjobaluk Country Tourism: Financial Projection Scenario 3

		First Qtr	Second Qtr	Third Qtr	Fourth Qtr	TOTAL Year 1	TOTAL Year 2	TOTAL Year 3	TOTAL Year 4	TOTAL Year 5
Marketing and Administration Wages	@10%	\$1,625	\$1,625	\$1,625	\$1,625	\$6,500	\$6,630	\$6,763	\$6,898	\$7,036
Tour Guides	\$45,000 average FTE	\$11,250	\$22,500	\$22,500	\$22,500	\$78,750	\$80,719	\$82,737	\$84,805	\$86,925
Educational and Cultural Heritage Staff	\$53,000 average FTE	\$17,225	\$17,225	\$17,225	\$17,225	\$68,900	\$70,623	\$72,388	\$74,198	\$76,053
Superannuation		\$2,860	\$3,928	\$3,928	\$3,928	\$14,644	\$15,007	\$15,379	\$15,761	\$16,151
Workers Compensation		\$699	\$1,083	\$1,005	\$1,080	\$3,867	\$4,122	\$4,529	\$4,768	\$4,981
Telephone, IT and Utilities		\$1,050	\$2,250	\$1,500	\$2,100	\$6,900	\$7,038	\$7,179	\$7,322	\$7,469
Travelling		\$180	\$180	\$180	\$180	\$720	\$2,200	\$2,200	\$2,200	\$2,200
TOTAL EXPENSES		\$1,388,990	\$50,616	\$49,680	\$50,970	\$1,540,256	\$222,194	\$227,973	\$233,545	\$239,198
SURPLUS/DEFICIT		-\$23,626	\$22,026	-\$6,392	\$24,446	\$16,454	\$68,457	\$167,395	\$229,709	\$284,037
CUMULATIVE SURPLUS/DEFICIT		-\$23,626	-\$1,600	-\$7,992	\$16,454		\$84,910	\$252,305	\$482,014	\$766,051
PROFIT AND LOSS ADJUSTMENTS										
Sales Income		\$38,400	\$125,276	\$70,913	\$128,476	\$363,065	\$472,600	\$674,673	\$788,060	\$882,988
Cost of Sales		\$8,016	\$52,634	\$27,625	\$53,060	\$141,335	\$181,949	\$279,305	\$324,806	\$359,753
Operating Expenses		\$54,010	\$50,616	\$49,680	\$50,970	\$205,276	\$222,194	\$227,973	\$233,545	\$239,198
Depreciation		\$22,187	\$21,827	\$21,472	\$21,123	\$86,609	\$83,119	\$77,716	\$72,665	\$67,942
NET PROFIT (before taxation)		-\$45,813	\$199	-\$27,864	\$3,323	-\$70,155	-\$14,663	\$89,678	\$157,044	\$216,095
Internal Rate of Return (10 years)	8%									

A summary of the results of the three projection scenarios is provided in Table 7.7.

Table 7.7 Summary Results of Financial Projections

	Scenario 1	Scenario 2	Scenario 3
Sales Income Year 1	\$299,408	\$343,408	\$363,065
Sales Income Year 5	\$429,123	\$601,638	\$882,988
Gross Margin Year 1	38.8%	40.6%	38.9%
Gross Margin Year 5	40.5%	39.7%	40.7%
Cash Surplus/Deficit after 5 years	-\$32,476	\$285,318	\$766,051
Peak Cash Shortfall	\$55,446	\$24,474	\$23,626
Net Profit: Year 5	-\$50,097	\$56,927	\$216,095
Internal rate of return (over 10 years)	-15%	-6%	8%
FTE Jobs by Year 5	4.5	4.9	5.4

8.3 Other Potential Investment Opportunities

The Wimmera Indigenous Tourism Group (WITG) and BGLC are seeking infrastructure and capital works financial support from the State Government through Regional Development Victoria, to support the implementation of the tourism products assessed in this feasibility. The financial viability indicates that the prospects for the enterprise, and the likely return on investment, are not sufficiently attractive for a private sector investor to be introduced.

However, there are some elements of the venture in which existing private and community sector operators are already involved or committed, and are enthusiastic about further investment and a relationship with Wotjobaluk Country Tourism/BGLC. In particular, these include:

1. Little Desert Nature Lodge and Conservation Volunteers Australia and New Zealand.

A major renovation of LDNL is proposed. The design report for the project (by Terroir) argues that the project is much more than the renovation of a Lodge.

“It is about:

- *Showcasing the Wimmera as an undiscovered region, a desert landscape, a wild place*
- *Removing the idea that remote is a disadvantage. As cities get busier and larger, remoteness is becoming a distinct advantage. People want to travel further, and to untamed places*
- *Creating a place that meets the growth markets for slower living, travel rather than tourism, experience, activity and learning. These markets want to enjoy the benefits of nature - health, wellbeing, spirituality, inspiration. They want to explore new places, go where others haven’t been, learn something new. These people want to live sustainably, make a difference,*
- *The Lodge, embedded in the Sanctuary, is the catalyst for change, for positioning the Little Desert as a place that fits with these values and aspirations*
- *It will offer an experience for community, day visitors, groups, and overnight tourists that cannot be replicated elsewhere”¹.*

¹Terroir, Little Desert Nature Lodge: Design Report, October 2015

LDNL and CVA, both proponents of the Lodge Renovation Project, enthusiastically welcome Wotjobaluk Country Tourism as a potential partner in realising the tourism objectives of the project, and are interested in a formal alliance with Wotjobaluk Country Tourism.

2. Development of Lake Tyrrell.

Lake Tyrrell has a bold tourism vision

“Lake Tyrrell is a world class natural attraction, celebrating the pristine salt lake environment and night sky, supported by a thriving tourism industry that contributes to the sustainability of the local community”¹.

Lake Tyrrell is attracting many visitors, but their economic contribution to the surrounding district, at present, is negligible. There is limited tourism infrastructure to attract overnight visitors and the majority of visitors are leaving the district immediately after visiting the lake.

Buloke Shire Council and Advance Sea Lake Inc. are seeking to take advantage of visitation to Lake Tyrrell by developing a tourism industry that drives positive economic outcomes for the region. The proponents of the Lake Tyrrell strategy welcome Wotjobaluk Country Tourism as a potential partner in realising the tourism objectives of the Lake.

3. Potential Re-Development of the Johnny Mullagh Cricket Centre in Harrow.

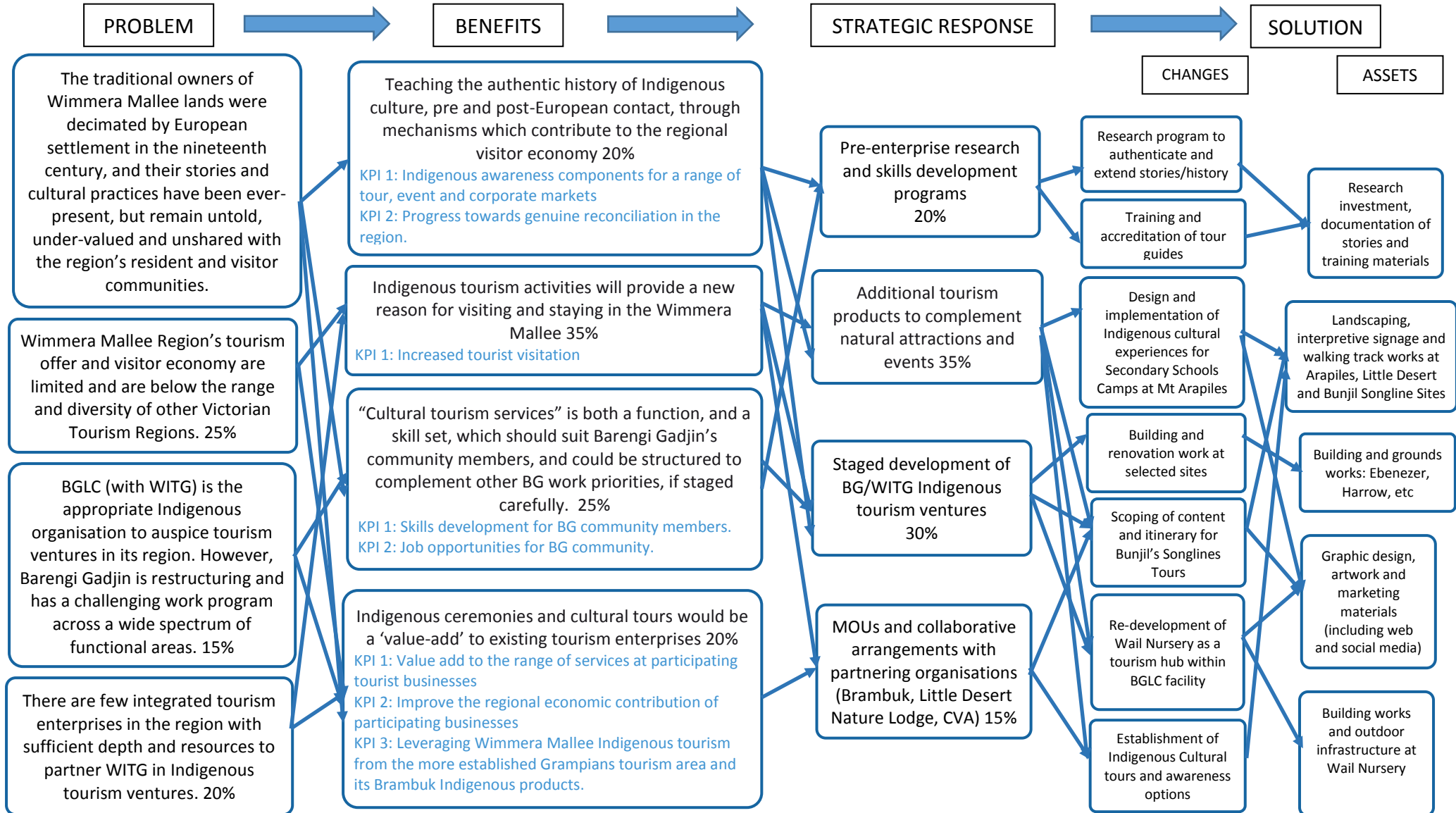
The Johnny Mullagh Cricket Centre has not been refreshed for more than 13 years, and there has been a loss of focus in the story of the Indigenous First XI Cricket Team, and the first international tour of England, as a unique Indigenous story, relatively soon after the establishment of European contact in western Victoria. It is a strong tourism feature and a unique story, which complements the historic look and feel of the Harrow streetscape.

The Harrow community and West Wimmera Shire Council, as proponents of the Johnny Mullagh Cricket Centre redevelopment welcome Wotjobaluk Country Tourism as a potential partner in realising this project.

¹ Lake Tyrrell Tourism Strategy 2016

APPENDIX A: INVESTMENT LOGIC MAP

Investment Logic Map for the creation of viable tourism business opportunities which utilise the natural and cultural Indigenous assets of Victoria's Wimmera-Mallee region (defined by the local government areas of Horsham, Hindmarsh, West Wimmera and Yarriambiack) and the Barengi Gadjin Land Council area:



APPENDIX B: INDIGENOUS TOURISM EXPERIENCES IN VICTORIA

PRODUCT NAME Year Commenced	MANAGING ORGANISATION	TOURISM AUST. CHAMPS	PRODUCT DESCRIPTION	LOCATION	PRICE	TOUR DETAILS if relevant
Aboriginal Heritage Walk @ Royal Botanic Gardens Melbourne Year commenced: 1999	Royal Botanic Gardens Melbourne (statutory authority)	Yes	Aboriginal guided walk (1.5 hrs) exploring traditional uses for plants for food, medicine, tools and ceremony exploring the ancestral lands that the Royal Botanic Gardens now occupies.	Melbourne CBD	tour \$31.00 Adult tour \$12.00 Child (5 to 17 years)	Operates daily - except Saturday 11am-12.30pm. Tour includes traditional smoking ceremony, guided walk through important areas of the Gardens, discussion about the traditional uses for food, tools and medicine, and finishes with lemon myrtle tea.
Brambuk: the National Park and Cultural Centre Year commenced: 1990	Brambuk's management is shared between five Aboriginal communities with historic links to the Gariwerd - Grampians ranges and the surrounding plains.	Yes	Exploration of Koorie culture through activities, displays, film, exhibitions, rock art site tours, and school educational and holiday programs. A gift shop offers a selection of authentic local and interstate Indigenous arts and crafts. The bush tucker Café serves bush tucker meals and snacks.	Halls Gap	Free Entry to centre \$80.00 Bunjil Creation Tour \$180.00 Six Seasons	Open daily – 9am-5pm <i>Bunjil Creation Tour</i> (4WD, 3 hrs)- Explores the local Dreamtime creation story, view ancient rock art at the resting place of the Creator Spirit Bunjil, his two helpers the Bram-Bram-Bult brothers. <i>Six Seasons Tour</i> (4WD, 5 hrs)- immersion in the Aboriginal culture of the Grampians National Park, learn ancient practices, view ancient rock art, and view the best vantage points of the Park. <u>Groups tour bookings available for:</u> <ul style="list-style-type: none"> • Gariwerd Dreaming Theatre • Creation Story • Welcome to Country • Didgeridoo Workshop & Cultural Talk • Boomerang Throwing • Bush Tucker Tasting • Badeema Djilga Creations • Bush Discovery Walk • Bunjil's Art Site Tour

PRODUCT NAME Year Commenced	MANAGING ORGANISATION	TOURISM AUST. CHAMPS	PRODUCT DESCRIPTION	LOCATION	PRICE	TOUR DETAILS if relevant
Budj Bim Tours @ Lake Condah Year commenced: approx 2002	Winda-Mara Aboriginal Corporation	No	Budj Bim Tours offer guests to Gunditjmara country a unique interpretation of the Budj Bim National Heritage landscape. Walk with the Gunditjmara people and see the aquaculture systems (40,000 years) and stone house foundations (8,000 years) that are part of the Gunditjmara story.	Heywood	\$40.00 Guided Tour \$100.00 Experience Package \$120.00 Day Tour	Tours operate every Monday, Wednesday and Friday at 10am and on select Saturdays. <i>Guided Tour (2 hrs)</i> - of the Tyrendarra Indigenous Protected Area where you learn about the unique circular stone dwellings, and see remnant house sites. Learn about Australia's earliest and largest stone aquaculture systems, including the fish and eel traps. <i>Experience Package (4hrs)</i> – Above tour plus whilst at the IPA receive a bush tucker lunch and a cultural performance by local Indigenous dancers. <i>Day Tour</i> – Above tour plus a scenic drive out to Mt Eccles-Budj Bim National Park and the Convincing Ground. Learn more about the pre and post-settlement history of the Gunditjmara people and the dreaming stories and figureheads that are important in Gunditjmara culture. Includes a fully catered bush tucker lunch.
Bunilaka Aboriginal Cultural Centre @ Melbourne Museum Year commenced: 2013	Museum Victoria		Through the voices and languages of our Koorie community, <i>First Peoples</i> tells the story of Aboriginal Victoria from the time of Creation to today. This major exhibition celebrates the history, culture, achievements and survival of Victoria's Aboriginal people. Also feature temporary exhibitions.		Museum entry Adult \$14 Children free	Open daily 10am-5pm Daily eel feeding talk Milarri Garden Trail – self-guided tour through Indigenous garden School group programs available

PRODUCT NAME Year Commenced	MANAGING ORGANISATION	TOURISM AUST. CHAMPS	PRODUCT DESCRIPTION	LOCATION	PRICE	TOUR DETAILS if relevant
Burrinja Year commenced: 1998	Dandenong Ranges Community Cultural Centre Inc.	No	Burrinja has a large collection of significant Aboriginal and Oceanic art works displayed in a unique gallery setting. Burrinja presents regular specialist exhibitions and showcases bush foods on the café menu in Uncle Neil's Place.	Upwey	Free entry to gallery \$6.60 Tour	Open Tuesday to Sunday 10am-4pm <u>Group tour bookings only:</u> <i>General Burrinja Tour</i> (30 mins)- A guided look around the entire Burrinja building, including galleries, theatre, backstage, art studios, café and Art of Place Indigenous Garden. In 2011 the building underwent expansion and refurbishment - discover the changes and the great history behind Burrinja.
Harry Nanya Tours Year commenced: 1992	Graham Clarke - Owner and operator	Yes	An Aboriginal owned and operated accredited tour company specialising in Aboriginal, cultural, interpretive tours of the archaeologically rich Lake Mungo. Includes a 2-kilometre Walls of China walk, a visit to the Lake Mungo Information Centre and Historic Woolshed, with time to take in the scenery at the Western Lookout which looks out over the vast expanse of Lake Mungo.	Mildura	\$180.00 Adult \$110.00 Child (5 to 16 years)	Operates daily Day Tours 8.30am-4.30pm Sunset Tours 2.30pm-10.30pm Tours include bush tucker tastings, all meals, national park entry fees, pickup and drop off from accommodation.
Johnny Mullagh Cricket Centre & Harrow Discovery Year commenced: 2004	Harrow community group	No	The Centre tells the story of Johnny Mullagh and the group of talented Aboriginal cricketers who toured England in 1868 and became Australia's first international cricketing stars, and the fascinating history of Harrow. Johnny 'Unaarrimin' Mullagh was laid to rest in Harrow Cemetery.	Harrow	Free Entry	Open Wed to Sun 11am-4pm Guided group tours Devonshire on the Dales hospitality package Annual cricket match on the Victorian March Labour Day long weekend involving a team of Indigenous cricketers and a team drawn from the local cricket association, come together for the honour of winning the Johnny Mullagh Memorial Cup.

PRODUCT NAME Year Commenced	MANAGING ORGANISATION	TOURISM AUST. CHAMPS	PRODUCT DESCRIPTION	LOCATION	PRICE	TOUR DETAILS if relevant
Koorie Heritage Trust Year commenced: 1985	Koorie Heritage Trust	No	Art gallery; retail outlet with authentic Koorie arts and gifts; changing exhibitions; interactive sound and visual exhibition tracing the history of the oldest living culture in the world; cultural officers; guided tours in Melbourne's CBD; and workshops such as basket weaving.	Federation Square Melbourne	Free Entry to gallery \$16.50 Per person Basket Weaving	Open daily - 10am-5pm <i>Learning Circle – Basket Weaving</i> Regular Friday lunchtime weaving workshops. <i>Guided walking tours of the Melbourne CBD</i> led by Koorie guides (Groups bookings only) visiting Brejerenewyn (Flagstaff) Walk, Birrarung Falls Walk, Scar Tree Walk and Birrarung Wilam (River Camp) Walk.
Krowathunkooloong Keeping Place Year commenced: 1994	Gippsland and East Gippsland Aboriginal Co-operative	No	The Krowathunkooloong Keeping Place has an excellent display of artefacts and history of the Gunnai/Kurnai provides interpretation of the art, history and culture of the area. The display includes traditional hunting and fighting weapons, bark canoes, baskets, fishing spears, boomerangs.	Bairnsdale	Free Entry	Open Mon to Fri 9am-5pm Visitors to the Keeping Place can learn, understand and appreciate the history of the Gunaikurnai people through guided or self-guided tours of the museum.
Narana Aboriginal Cultural Centre Year commenced: estimate 1997	Uniting Aboriginal and Islander Christian Congress	No	The centre aims to build understanding of Aboriginal history and culture, through personal interaction with groups and individuals. Nestled amongst native trees, walkways, garden and resident wild life is the Cultural Education centre, Art Gallery, Café Narana and Retail Outlet.	Geelong	Free Entry \$11.00 Aboriginal Stories \$12.00 Intro. to History \$15.00 Extensive Studies	Open Mon to Fri 9am–5pm and Sat 10am - 4pm <u>Group tour bookings only:</u> <i>Aboriginal Stories for Kids</i> -Dreamtime Stories and Games, Boomerang Throwing, Garden Walk <i>Introduction to Aboriginal History</i> - presentation and discussion of Aboriginal culture and history, pre and post-colonial, Boomerang Throwing <i>Extensive Aboriginal Studies</i> - One hour Presentation on your chosen topic. Choice of Garden Walk or Boomerang throw

PRODUCT NAME Year Commenced	MANAGING ORGANISATION	TOURISM AUST. CHAMPS	PRODUCT DESCRIPTION	LOCATION	PRICE	TOUR DETAILS if relevant
Worn Gundidj @ Tower Hill Year commenced: 2002	Worn Gundidj Aboriginal Co-operative	Yes	Tower Hill is a thriving reserve and natural history centre, where visitors can experience the bush, enjoy magnificent scenery, see Australian birds and animals in their natural habitat and learn about local Indigenous culture. Centre is also a retail outlet of Indigenous arts and crafts.	Warrnambool	<u>Day</u> \$23.00 Adult \$11.00 Child (5 to 15 years) <u>Twilight</u> \$28.00 Adult \$14.00 (5 to 15 years)	Centre open daily 10am-5pm Tour operates daily – 11am-12.30pm <i>Bush & Nature Walk</i> - An interactive bushwalking tour conducted by an experienced local guide for an exclusive opportunity to explore the natural habitat of some of Australia's most iconic native animals whilst learning about the regions Aboriginal culture and heritage. Gain an understanding of traditional Aboriginal lifestyles and the native plants used for food and medicinal purposes. <u>Seasonal only:</u> <i>Twilight Bush & Nature Walk</i> - Enjoy seeing the nocturnal wildlife come to life on a two hour twilight tour departing at dusk. Admire the silhouetted crater of the volcano and the stunning landscape of Tower Hill at sunset. Catch a glimpse into the nocturnal activity of some of Australia's most iconic native animals including koalas, kangaroos, bats, owls, possums and sugar gliders.

APPENDIX C: CULTURAL AWARENESS TOURS FOR THE CORPORATE MARKET

Following is a list of some of the more prominent cultural awareness tours available in Australia for the corporate market.

Indigenous Cultural Awareness Tour (CAT)	State	Operated by Indigenous Community or Private Operator	Developed for the Corporate market	Tour Duration	Tour Cost	Tour Inclusions	Tour Activities	Clients own transport or transport provided by supplier	Max group size
1. Gulaga Creation Tour Ngaran Ngaran Culture Awareness http://www.ngaranaboriginalculture.com/	NSW	Aboriginal owned and operated Cultural service provider	Yes	Starts Friday at 7pm and finishes on Sunday at 11am - 2 nights/1 full day (40 hours)	Adult: \$605.00 (16+) Child: \$220.00 (5-16 years) Child: Under 5 years free	Tour includes two nights' accommodation, all meals and a team of guides from NNCA offering insights, knowledge and dreamtime stories for the duration of the experience.	Aboriginal ceremony, dance, yidaki (didgeridoo), and yarning circles. Learn from Aboriginal guides. Walk and experience Gulaga Mountain, described by Aboriginal people 'place of ancestral origin for all Yuin people'. Gulaga provides a basis for Aboriginal spiritual identity.	Requires clients to use own transport to drive 15km return	16
2. Djirringanj Dreaming Tour Ngaran Ngaran Culture Awareness http://www.ngaranaboriginalculture.com/	NSW	Aboriginal owned and operated Cultural service provider	Yes	2 nights/1 full day (40 hours)	Adult: \$650.00 (16+) Child: \$220.00 (5-16 years) Child: Under 5 years free	2 nights shared accommodation. All meals. Full Day Guided Bus Tour.	Traditional Dance. Bus Tour. Yarning Circles. Beach Ceremonies. Didgeridoo Performance.	Bus transport provided	16
3. Tiwi Day Tour https://www.sealinknt.com.au/tours/tiwi-day-tour/	NT	Sealink Travel Group - Private Non-Indigenous Operator	Yes	1 full day - Operates Thursday and Friday from 01 Apr - 16 Dec	Adult \$285 Child \$143(5 - 14 yrs incl)Senior \$257 with valid seniors card	Return ferry Darwin to Bathurst Island (Tiwi Islands), local Tiwi guide, morning tea with the Tiwi ladies.	Visit the Culture Museum's displays of traditional art and depictions of the Tiwi 'dreamtime' stories. Visit the Mission Precinct Catholic Church. Tiwi ladies perform a smoking ceremony to bless visitors.	Ferry transport provided	N/A

Indigenous Cultural Awareness Tour (CAT)	State	Operated by Indigenous Community or Private Operator	Developed for the Corporate market	Tour Duration	Tour Cost	Tour Inclusions	Tour Activities	Clients own transport or transport provided by supplier	Max group size
4. Ultimate Tiwi Islands https://www.sealinkn.t.com.au/tours/3-day-ultimate-tiwi-islands/	NT	Sealink Travel Group - Private Non-Indigenous Operator	Yes	2 nights/3 days Monday and Wednesday departures from June to September	3 Day Fly/Fly \$2500	Two nights accommodation, all meals and non-alcoholic drinks, return flights from Darwin	Half day coastal sightseeing on small boats, sunset excursion to Shark Bay, flight to Melville Island. Meet the artists at the art centres, hear the stories, fish the pristine waters.	All transport provided	N/A
5. Budj Bim Tours (Members of the Gunditjmara community)	VIC	Aboriginal owned and operated	Tailor made	Tailor made - 1 or 2 days	Tailor made	Tailor made to suit client's needs. Tours can be customised to suit individual needs, including bush-tucker catering, cultural performances or additional locations.	Learn local culture and history from discussions with local Traditional Owners. Experience the land and stories by Traditional Owners. Apply the cultural learnings to specific work themes and challenges	N/A	N/A
6. Koorie Heritage Trust http://koorieheritage.trust.com.au/cultural-education/building-aboriginal-cultural-competency/	VIC	Aboriginal Trust	Yes	Half day and full day programs	Half day \$2020 (group size 10-25) Full day \$3330 (group size 10-25)	Melbourne Federation Square room facilities or off-site if preferred	Sample of Topics: Building blocks of identity (Heritage before Ned Kelly, Aust. history revisited; The Vic. Tsunami – European colonisation; historical contemporary issues, stats of impact)	N/A	Min 10 - Max 25

Indigenous Cultural Awareness Tour (CAT)	State	Operated by Indigenous Community or Private Operator	Developed for the Corporate market	Tour Duration	Tour Cost	Tour Inclusions	Tour Activities	Clients own transport or transport provided by supplier	Max group size
7. Indigate http://indigate.com.au/	VIC	Aboriginal owned and operated Cultural Awareness Training provider	Yes	Tailor made	Tailor made	Tailor made	Cultural awareness and Reconciliation Action Plan (RAP) training. For organisations to develop strategies including multi-layered Indigenous engagement.	N/A	N/A
8. City of Yarra (Cultural Awareness Training) http://www.yarracity.vic.gov.au	VIC	Delivered by four well-known Aboriginal actors—Uncle Jack Charles, Melodie Reynolds, Greg Fryer and Jason Tamiru	Developed by the City of Yarra for staff members to complete Cultural Awareness Training		City of Yarra staff inclusion	Local identity story telling and walking tours	Follow in my Footsteps: Celebrating Aboriginal Culture in Gertrude Street. Promoted cultural awareness by enhancing a local sense of identity and community pride through storytelling, walking tours.	Walking tours	City of Yarra staff
9. Luridgii Tours http://www.luridgiitours.com.au/luridgii-cultural-awareness-tours-1/	WA	Operated by Miriuwung country Traditional Owner Ted Hall	Yes	Luridgii Cross Cultural Awareness programs operate 7 days a week throughout the year.	One-Day \$837.50 per person (Group of 10) Two-Day \$1543 per person (Group of 10) Half-day or two hour sessions \$500 per hour per group	Luridgii Cultural Awareness programs can be held at 2nd Gorge on Mandangala land, in town or at venue of choice. Held on Miriuwung country, due to cultural protocols.	Learn local culture, history and social norms from in-depth discussions with Miriuwung man Ted Hall. Learn how to cultivate skills for working in culturally diverse situations.	N/A	Min. group size 10

Indigenous Cultural Awareness Tour (CAT)	State	Operated by Indigenous Community or Private Operator	Developed for the Corporate market	Tour Duration	Tour Cost	Tour Inclusions	Tour Activities	Clients own transport or transport provided by supplier	Max group size
10. Koomal Dreaming Cultural Experiences http://www.koomaldrreaming.com.au/cultural/	WA	Aboriginal owned and operated Cultural service provider	Yes	2.5 hours - Starts 9am Thursday - Sunday	Adults: \$78 Children: \$44 (Under 3 Free)	Traditional owner tour guide, cave experience	Taste native foods, discover bush medicine and experience traditional fire lighting. Stories of Dreaming spirits, takes visitors deep into Ngilgi Cave for a didgeridoo cave experience.	N/A	Minimum 4 Maximum 30