

Invest in the Grampians



INVEST

THE
*Grampians
Way*

www.investgrampians.com.au



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WELCOME TO THE GRAMPIANS

It is with great excitement that Grampians Tourism presents this Investment Prospectus, which has been a collaborative effort by many agencies to showcase the potential of the whole region. I sincerely believe the Grampians is ripe for the greatest tourism development opportunities throughout Australia with its world-class natural environment and rich indigenous culture.

Grampians Tourism is the key organisation helping promote the region and assisting businesses to build a world-class experience for travellers. We believe that once people have visited, they will be amazed by the huge number of attractions with an extensive list of sensational destinations.

Our visitor's wonderful experiences and strong word-of-mouth endorsement for the Grampians region can be felt and seen almost daily.

At Grampians Tourism we have a passion and vision for what can be achieved with the right partners promoting a truly unique experience set in some of the most picturesque landscapes throughout Australia.

David Jochinke
Chair,
Grampians
Tourism Board Inc.



The Grampians is a vibrant destination and with a well-established profile, strong visitation and highly supportive local and state government partners, the Grampians is a great place to do business.

The Grampians region includes the Ararat, Horsham, Northern Grampians and Southern Grampians local government areas and with over \$250 million worth of current and future tourism investment projects underway, now is the perfect time to invest in our destination.

The recent \$33 million state and federal government investment into the Grampians Peaks Trail attracts opportunities to the region well beyond the walk itself and is an important economic and tourism development for the local community, the wider region, and for Victoria as a key nature-based tourism destination.

Overnight visitation is also forecast to double over the next 10 years and this Investment Prospectus highlights a variety of investment opportunities to consider which cut across all four local government areas, plus offer a variety of investment levels as well.

If looking to invest, you will find a region that is open for business and takes a very proactive approach to supporting investment and development.

Marc Sleeman
Chief Executive
Officer,
Grampians
Tourism Board Inc.



Acknowledgement of Country

Grampians Tourism acknowledges the traditional owners, Djab Wurrung, Jardwadjali and neighbouring First Peoples, who are the traditional custodians of the area where friends

and family visit to enjoy everything the Grampians region has to see and do. We respect their history, culture and Elders, past and present, and their continuous connection to Country.

REGIONAL LOCATION MAP

The Grampians region is well serviced by major highways, whether travelling from Melbourne, Adelaide or the Great Ocean Road.



A GREAT PLACE TO INVEST

Local government plays a central role in the achievement of successful outcomes for tourism investors

The Grampians region includes the local government areas of Ararat, Horsham, Northern Grampians and Southern Grampians. Each of these Councils is highly supportive of tourism development and investment and has partnered in the development of this prospectus. A variety of key State Government agencies have also been major contributors to this document as they continue to support strong investment in enabling infrastructure.

Councils across the region have economic development specialists who are responsible for facilitating investment, and local government performs a key role in providing information that will assist in the preparation of the concept and later, approval of the project. Each of the Grampians' local government partners can provide:

- Potential development sites and facilitate a connection with existing landholders
- Assistance with navigating the planning and approval process
- Statistics on development
- Information on new projects in the pipeline
- Advice on areas where certain investment opportunities are being promoted
- Employment profiles
- Demographic information
- Real estate information, and
- Contacts in state or regional agencies where further useful information and financial assistance may be obtained.

Alignment with State Government's key priorities

The Grampians has developed a significant destination profile through its values for nature-based and adventure activities.

Visitors can experience a range of outdoor pursuits in the renowned Grampians (Gariwerd) National Park which covers 170,000 hectares at the western end of the Great Dividing Range. Within the Park are a diverse collection of plants and wildlife, walking tracks including the Grampians Peaks Trail, lookouts offering incredible panoramic views, waterfalls, lakes and forests. It's also a spiritual place rich in creation stories, sacred sites and central to the dreaming of its peoples. As outlined in the Visitor Economy Recovery & Reform Plan (VERRP), two key experience pillars that provide significant

opportunities for growth are nature-based and First Peoples-led experiences. As main drivers of visitation, the Grampians region directly aligns with the State Government's key priorities.

There are many reasons to consider investing in the Grampians including:

- **A growing visitor economy.** Pre-COVID-19, visitation increased by 55% with an additional 600,000 visitors between 2013 and 2019. Between 2022 and 2033, travel to the Grampians is anticipated to grow by over 679,000 visitors.
- **Tourism is an extremely important sector** for the Grampians – it delivers over \$560 of visitor spend every minute of every day and accounts for almost 4% of jobs as well as 2% of total output. The sector is forecast to offer significant growth potential.
- **Solid economic growth** and an increased desire to diversify the economy to pick up on global trends in tourism, tech and innovation. The region has a strong appetite for investment and growth from its visitor economy, widely supported by all key partners.
- **Ideally located as a mid-way point between Melbourne and Adelaide,** the Grampians attracts a large self-drive market between these two cities and via the Great Ocean Road. This supports a greater length of visitor stay and higher spend on accommodation, attractions and retail.
- **Proximity to metro Melbourne,** which is the fastest-growing capital city in Australia. Around 55% of Melburnians have not been on an overnight trip to regional Victoria providing an opportunity for considerable growth.
- **First-rate utility services** including electricity, water, gas, wastewater management solutions and NBN connection to support new developments.
- **A diverse business community** including vibrant and varied businesses to support all sectors of the visitor economy such as business, leisure, special interest, education, visiting friends and relatives, and other forms of visitation.
- **A great lifestyle.** There is something for everyone with excellent recreational, cultural and sporting facilities and events, natural attractions, a range of dining options, shopping facilities, and high-quality education and healthcare services.

KEY SECTORS

The Grampians is the ideal place to do business in tourism. It has a well-established profile, strong domestic visitation, access to skilled employees and highly supportive local and state government partners.

Major industry sectors that contribute to the region's economy include:

- Tourism
- Manufacturing
- Construction
- Agriculture
- Healthcare
- Public Administration and Safety
- Education and Training
- Professional Services

The agricultural sector continues to be a major employment generator and economic driver. The sector is supported by the region's fertile soils and regular, reliable rainfall. The main items produced by the region include wool, broad acre grazing, cereal cropping, viticulture and olive growing. There exist significant opportunities to leverage the region's agricultural profile and develop agritourism experiences which complement the current nature-based recreational focus of the region.

The Grampians' broad spectrum of industries, as indicated above, consolidate as a secure base

for a thriving economy and facilitates powerful networking and collaborative opportunities. It also means that there are significant value-add opportunities for the tourism sector to leverage.

The recent (and ongoing) significant investment by the Victorian State and Federal Government in the Grampians Peaks Trail of over \$33m reflects the desire on the part of Government to continue to strengthen the visitor economy and also reflects its faith in the growth potential of the region. This is expected to help stimulate demand for new guided tourism experiences along with accommodation in surrounding areas to support a longer length of stay.

In addition to the above, the Victorian Government has also provided \$19m in funding for flagship projects in the Grampians, investing further in GPT trailheads in each LGA, upgrading facilities at MacKenzie Falls and with the revitalisation of Brambuk – The National Park and Cultural Centre. As illustrated in this Investment Prospectus, there are a variety of investment opportunities to consider which cut across all sectors of the regional visitor economy, are located throughout the four local government areas, plus offer a variety of investment levels as well.

OUR COMPETITIVE ADVANTAGE

With collaborative Councils and a supportive community, there has never been a better time to invest in the Grampians.

Strong strategic regional connectivity

Via the Western and Glenelg Highways to South Australia and the Great Ocean Road.

Proximity to the fastest growing capital city

Melbourne is just 2.5 hours away and 55% of Melburnians have not been on an overnight trip to regional Victoria.

Enviably lifestyle with a growing number of tree changers

Supported by quality community amenities and infrastructure.

Strong domestic visitor market

This meant that COVID-19 impacts were smaller than for many other destinations nationwide.

Well positioned to leverage the State Government's key experience pillars

Of nature-based and First Peoples' led experiences. The Grampians is a playground for outdoor adventurers and has a fascinating Aboriginal story to tell.

Ongoing public investment

To support tourism growth including the Grampians Peaks Trail, MacKenzie Falls, Brambuk – The National Park & Cultural Centre, Ararat Hills Mountain Bike Trail Project, the Dunkeld Visitor Hub which includes the Penshurst Volcanoes Discovery Centre, and activation of the Wimmera River and Bike Trail from Horsham to Natimuk.

Access to an educated and skilled workforce

62% of residents have a certificate qualification or higher.

National and international reputation of the Grampians Peaks Trail

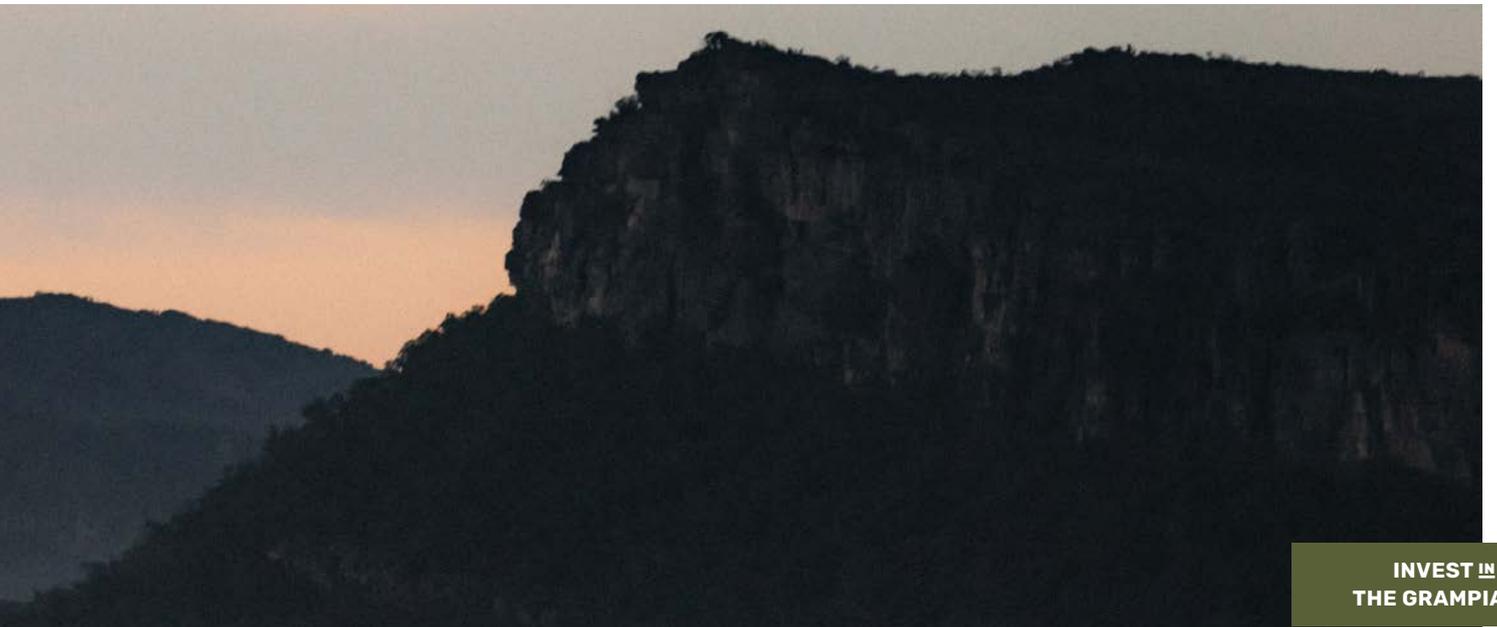
GPT is quickly becoming one of Australia's signature great walks.

Economic diversity

Building on the strength of the agricultural and tourism sectors and leveraging these across the broader economy.

Strong support from Councils

Who work collaboratively to support and facilitate investment.



VISITATION IS GROWING

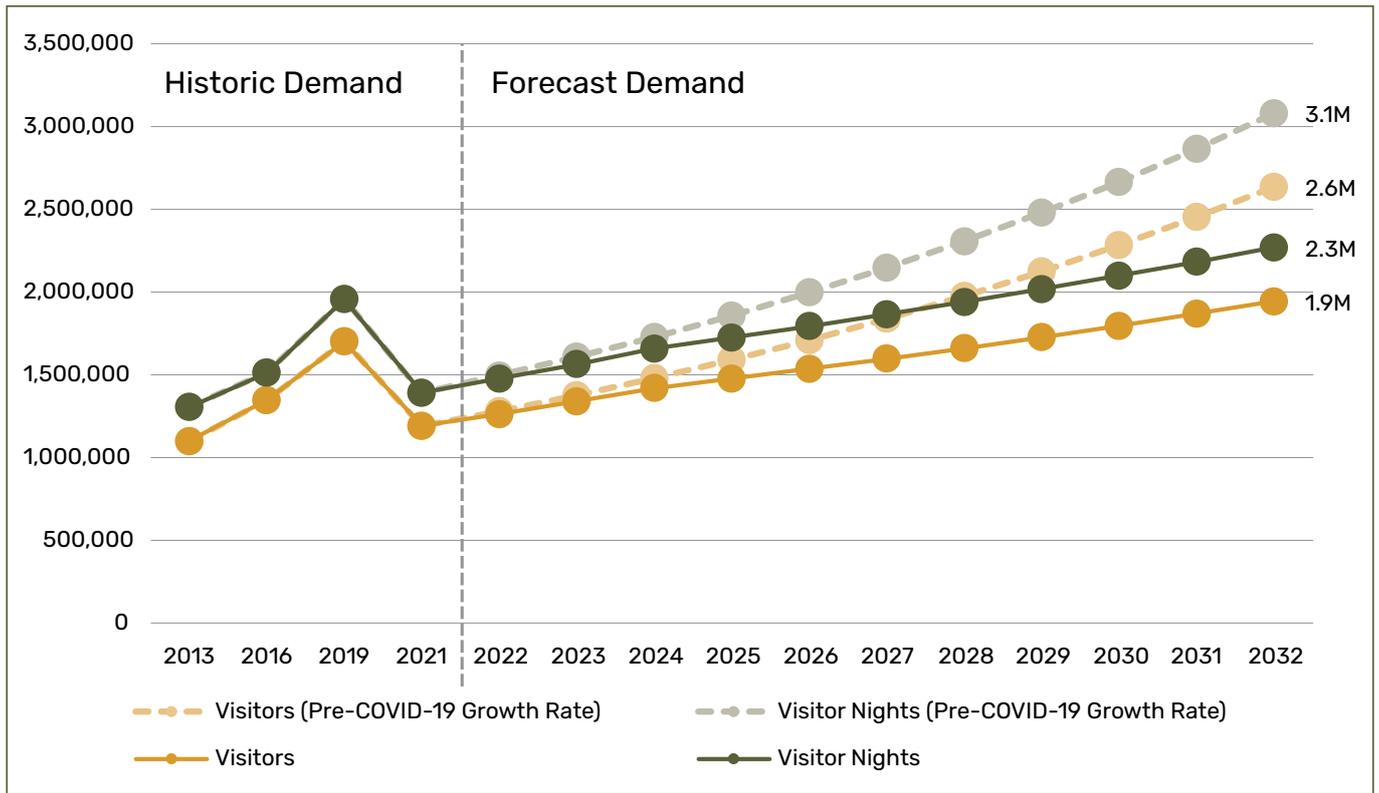
Prior to COVID-19, visitation to the Grampians was growing, with a strong compound annual growth rate (CAGR) of 7.5% between 2013 and 2019. Nights spent in the region also increased, with a CAGR of 7.0%.

Like the vast majority of destinations globally, the Grampians region saw a decline in visitation as a result of border closures and travel lockdowns instated by Government in response to the COVID-19 pandemic. Despite this, visitation to the Grampians was not as dramatically impacted as many other regions because of its regional location and assets and strong profile in the domestic market.

The figure below demonstrates visitation growth projections, along with visitor night forecasts

for the region. A conservative growth approach has been adopted to reflect a desire to move toward a higher yield and value-driven economy, rather than merely focusing on visitor volume.

The growth projections still reflect a strong and sustainable CAGR of 4.5%. This can significantly grow if there is a greater supply of new and enhanced accommodation and tourism products/experiences throughout the region to help meet market demand.



Regional visitors & visitor nights forecasts

* Based on medium growth forecasts for the region.

NEW ACCOMMODATION NEEDED BY 2025

While the Grampians has a five-star natural environment, the quality of accommodation stock is more variable and therefore offers several opportunities for new and enhanced facilities.

To support the ongoing projected visitor growth for the region, there is a need to introduce new accommodation stock. In order to cater to the high-value traveller – who are likely to spend more, stay longer, disperse more regionally and who also have distinct key drivers for destination choice such as nature, wildlife, food and wine – higher-quality and more diverse forms of accommodation are required.

The figure below shows the current commercial accommodation supply in the Grampians, including quality commercial accommodation supply*, measured against demand forecasts for medium scenario growth.

This illustrates that an estimated regional occupancy threshold of 85% is reached by 2026. This level of occupancy reflects when new development and capacity are needed and is a general metric applied across many regions.

Capacity vs demand forecast for the Grampians region's accommodation



*It is estimated that approximately 75% of the commercial accommodation room stock available in the Grampians is of a sufficient quality to be truly marketed as being a 3-star quality standard or higher.

VALUE OF THE VISITOR ECONOMY

AT A GLANCE

With high-quality natural assets, a rich cultural history and a foundation of strong business sectors which continue to evolve, the Grampians is a vibrant and exciting destination in which to invest.

\$297M
spend in the region

5,900 JOBS
supported by tourism

1.7M
visitors to the region

2.5 NIGHTS
average length of stay

2.0M
nights in the region

\$1.09B
in tourism output

* Based on YE Dec 19 pre-COVID visitation data.



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VICTORIAN GOVERNMENT – BACKING TOURISM

In 2019, the Victorian Government commissioned the Regional Tourism Review to identify opportunities to grow regional tourism.

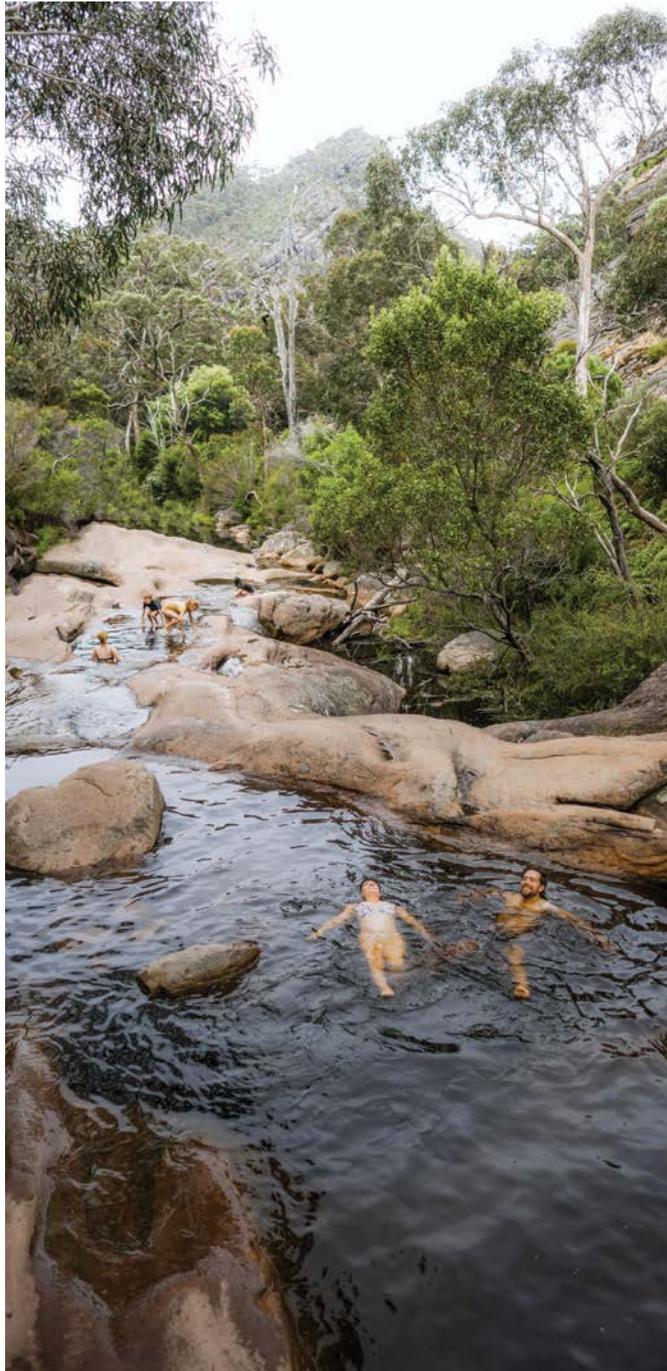
The State Government recognised the critical need to support the tourism sector as a significantly impacted industry, following the bushfires and then the global pandemic, and the subsequent Visitor Economy Recovery and Reform Plan (VERRP) confirms that commitment.

Informed by the findings of the Regional Tourism Review, the VERRP aims to strengthen the state's enviable tourism offering by developing new experiences, products and infrastructure and attracting more international, interstate and intrastate visitors by making the most of marketing expenditure.

With investment of over \$633m across four years, the Victorian State Government is dedicated to developing and improving the visitor experience through destination planning and industry development and, as the tourism market grows more competitive, encourage public and private investment to not only provide high-quality tourism products but to grow the visitor base and inspire visitors to stay longer and spend more.

The Visitor Economy Plan highlights the importance of nature-based tourism as a key pillar for tourism development. And the Government's significant investment in the Grampians Peaks Trail highlights this as a hero experience for our state. With their commitment to strengthening the visitor experience, the Grampians region is well positioned to continue leveraging the State's focus on arts and culture, epicurean, natural attractions, and First Nations' led tourism experiences.

With the State Government's backing, Victoria and the Grampians is a great place to invest.



STATE & FEDERAL GOVERNMENT SUPPORT

Some of the region's most exciting projects have just recently been delivered or are currently in progress and are rapidly transforming the region.

Ongoing investment in infrastructure is a key commitment of the Victorian State Government and each Local Government partner, providing significant opportunities for private sector leverage and involvement in its delivery.



Grampians Peaks Trail
Over \$33m in State and Federal Funding.



MacKenzie Falls Revitalisation
Over \$7.76m in State Funding.



Grampians Peaks Trail Trailheads
\$5m in State Funding.



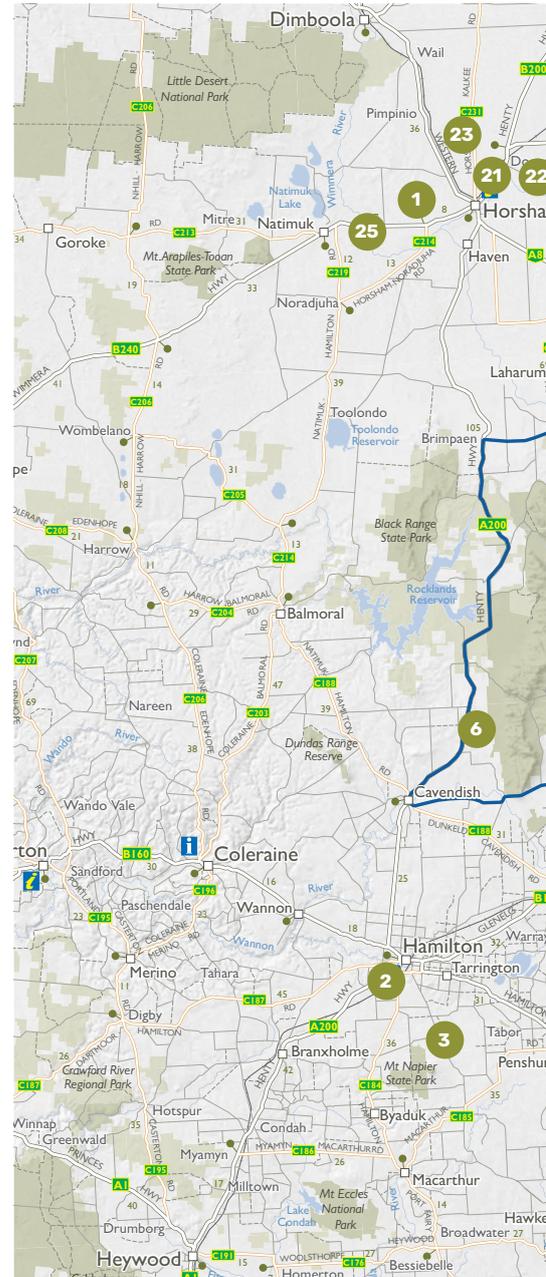
Brambuk Revitalisation
\$6m in State Funding.



Ararat Hills Mountain Bike Trail Project
\$2.7m in State Funding.



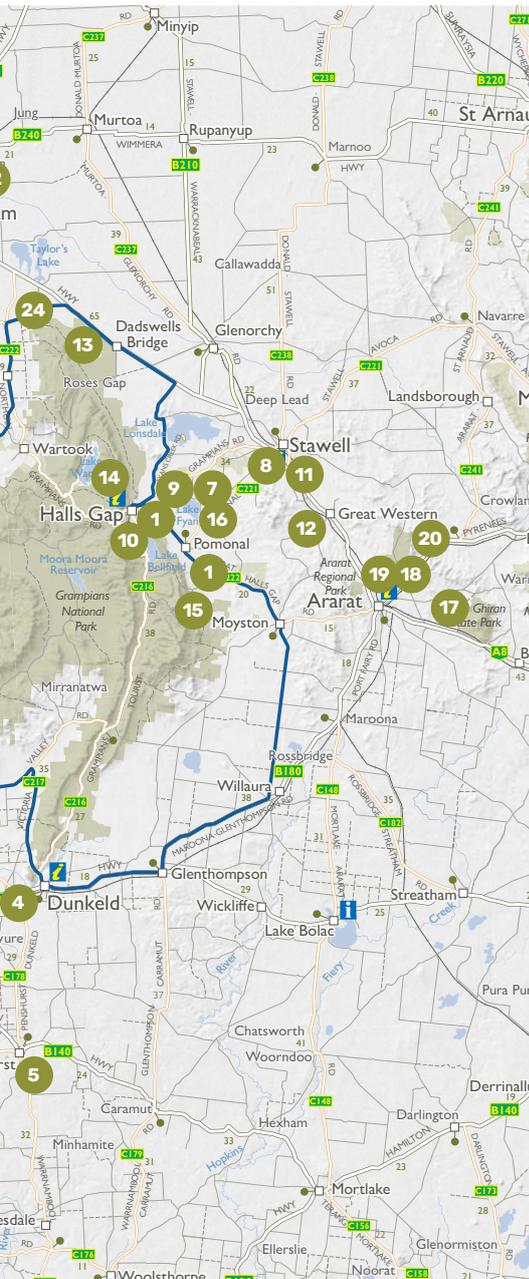
Dunkeld Visitor Hub & Penshurst Volcanoes Discovery Centre
\$1.4m with \$500,000 in State Funding.



INVESTMENT PROJECTS: \$250M

The current and future tourism investment projects for the Grampians region are valued at over \$250m and will further enhance the visitor experience.

These new and innovative tourism projects will drive visitation, increase yield and length of stay, and will continue to position the Grampians region as a leading nature-based tourism destination.



- 1 **Australian Tourism Group & Destination Collective**
Boutique accommodation development – \$50m
- 2 **Hamilton CBD Redevelopment**
Redevelopment – \$25m
- 3 **Greater Hamilton Volcanic Trail**
Masterplan – \$1m
- 4 **Dunkeld Visitor Hub**
Experience Hub development – \$1.4m
- 5 **Penshurst Volcanoes Discovery Centre**
Visitor experience redevelopment – \$500,000
- 6 **Bull's Roar Brewing Co.**
Food and beverage development – \$1.5m
- 7 **WAMA – Where Art Meets Nature**
Eco-tourism destination project – \$9m
- 8 **Grampians Stawell Central**
36 luxury suites development – \$9m
- 9 **GROW at Grampians Getaway**
Health and wellbeing development – \$3m
- 10 **Halls Gap Luxury Accommodation**
Development project underway – \$1.25m
- 11 **Dark Matter Discovery Centre**
Visitor experience development – \$10m
- 12 **Great Western Accommodation**
Development project – \$15m
- 13 **Peaks Eco Retreat**
Eco accommodation development – \$1.5m
- 14 **SHAK accommodation**
High end accommodation development – \$1.15m
- 15 **Pomonal Bath House**
Health and wellbeing development – \$3.5m
- 16 **Pomonal Estate Resort**
Accommodation development – \$3.5m
- 17 **Green Hill Lake Estate**
Residential development – \$4.5m
- 18 **Chalambar Estate**
Residential development: stage 1 – \$1.5m
- 19 **Omeroo Estate**
Residential development – \$3.5m
- 20 **Evans Park**
Residential development – \$7m
- 21 **Horsham City to River Development**
Major development – \$30.1m
Includes: **Wimmera Riverfront Activation** – \$3.6m
Horsham Nature Water Play Park – \$2.45m
- 22 **Quest Apartment Hotel Horsham**
Accommodation development – \$14m
- 23 **Aerodrome Master Plan Works**
Master planning – \$2.4m
- 24 **Mount Zero Resort**
Luxury nature-based accommodation development – \$26.5m
- 25 **Wimmera River Discovery Trail (Horsham to Natimuk)**
Visitor experience development – \$2.95m

INVEST IN
THE GRAMPAINS

GRAMPIANS PEAKS TRAIL



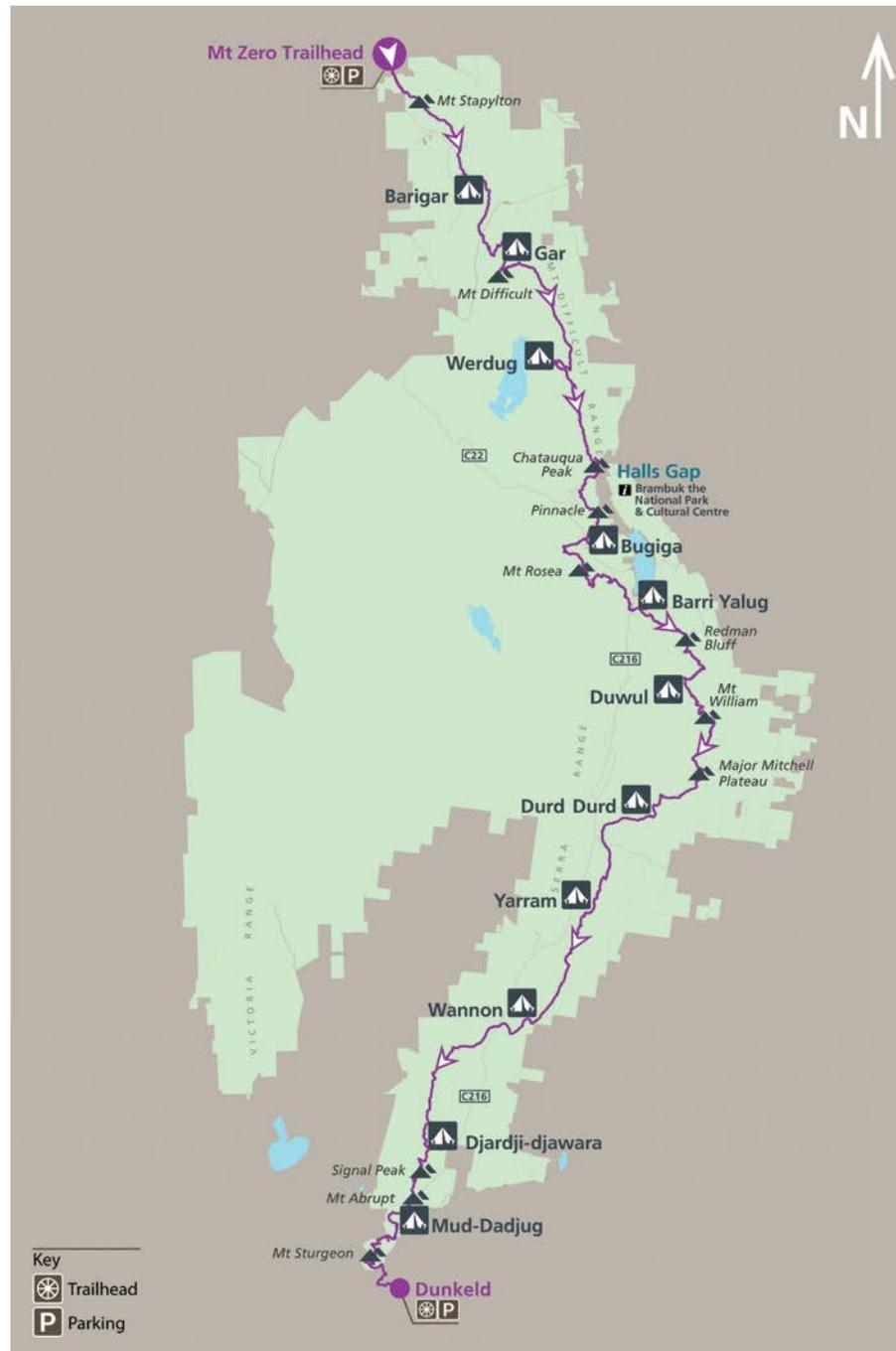
The Grampians Peaks Trail connects some of the Grampians' most spectacular peaks, from the massive sandstone outcrops around Mount Stapylton in the north to Mud-Dadjug (Mount Abrupt) in the south. It can be done as the full 160km 13 day/12 night hike, or in shorter sections with more than 20 different trail options on offer.

Regardless of the itinerary selected, the trail provides walkers an experience rich in the Aboriginal culture of the Jardwadjali and Djab Wurrung peoples, who have lived in these ranges they call Gariwerd for thousands of years.

Interpretation signage along the trail helps hikers learn more about the area's Aboriginal cultural heritage and provides information about the national park's incredible environmental values.

There are 11 bookable hike-in campgrounds with camper numbers capped at between 20 to 35 depending on the location and to ensure a special experience. Two of the hike-in campgrounds, Gar and Werdug, feature three small Hiker Hut accommodation options, to support walkers looking for more comfort. These huts are only bookable by Licensed Tour Operators.





GAME CHANGER FOR THE GRAMPIANS REGION

- The Grampians (Gariwerd) National Park is a major Australian attraction and the third most visited park in the state with over 1.3 million visitors per year.
- By 2025, 35,000 walkers are projected to visit Grampians (Gariwerd) National Park, generating \$6.39m of economic benefit and tourism development opportunities for the region each year.
- Construction and operation of the trail is estimated to create 175 jobs.
- With the trail projected to bring more than 23,000 additional walkers to the area each year, staying around 53,200 nights by 2025, extra jobs will be needed to service visitors' needs in the hospitality, tourism and accommodation industries.

GRAMPIANS PEAKS TRAIL \$33M INVESTMENT

Hike to new heights

A world-class 160km hiking experience with spectacular views

The Grampians Peaks Trail is a challenging hiking experience along the rooftop of the heritage-listed Grampians (Gariwerd) National Park.

The \$33 million investment attracts opportunities to the region well beyond the walk itself and is an important economic

and tourism development for the local community, the wider region, and for Victoria as a key nature-based tourism destination.

Bookings performance

Since its opening, more than 10,000 nights have been booked in campgrounds along the trail. And by attracting new visitors to the park and increasing the length of their stay, the Grampians Peaks Trail is providing a significant boost to the region's visitor economy.

INVEST IN THE GRAMPIANS

KEY HERO VISITATION PILLARS

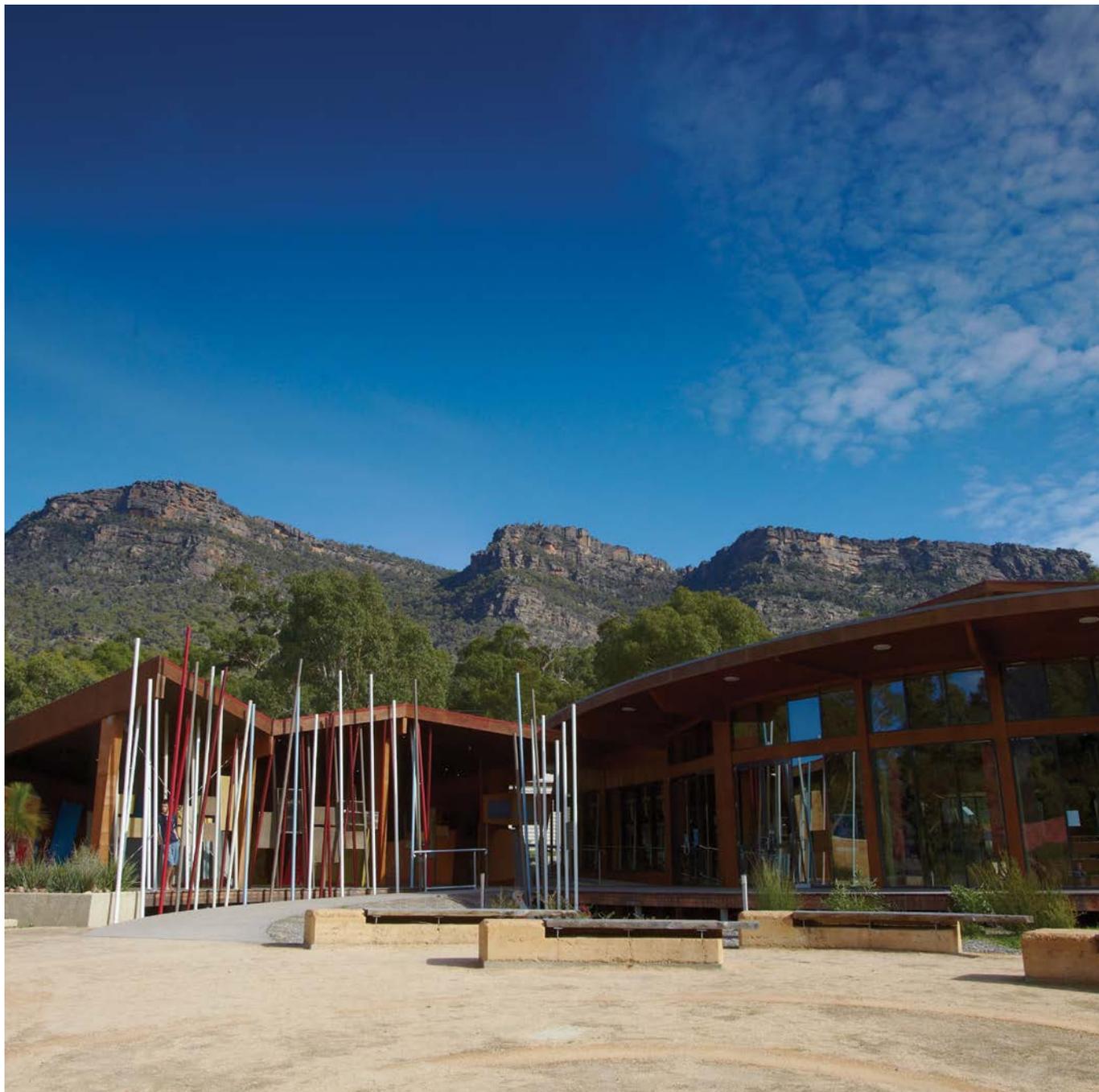


GRAMPIANS (GARIWERD) NATIONAL PARK

Renowned for rugged mountain ranges, rich cultural heritage and breathtaking views, the Grampians (Gariwerd) National Park is one of Victoria's most popular holiday destinations for outdoor adventures and scenic drives. The National Park is highly regarded for its ecological diversity and for south-eastern Australia's highest concentration of Aboriginal rock art. A network of walking tracks and

lookouts throughout the park take visitors to spectacular waterfalls, rock formations and trailheads, providing hikers with increased flexibility, information and facilities to access the trail. Improvements will likely include new toilets at some locations, improved car parking, larger water tanks, and opportunities to learn more about the Aboriginal cultural and environmental values of Gariwerd.





INDIGENOUS CULTURE AND BRAMBUK — THE NATIONAL PARK AND CULTURAL CENTRE

The Grampians is pivotal to many ancient stories of Aboriginal communities in south-western Victoria. The region has the largest number of rock art sites in southern Australia and is home to over 85% of Victoria's rock art sites, some dating back over 20,000 years. Visitors are invited to experience these cultural sites first-hand and to learn about the region's unique Aboriginal culture and history at Brambuk — The National Park and Cultural Centre in Halls Gap.

Over the last 30 years, Brambuk has supported Gariwerd Traditional Owners as a gathering place for community business, training, cultural heritage services, activities and celebrations. Parks Victoria is currently collaborating with Traditional Owners on a Reimagining and Revitalisation project and \$6m in State Government funding has been invested to revitalise Brambuk so that it can continue to evolve as a flagship cultural experience in Victoria.



INVEST 
THE GRAMPIANS

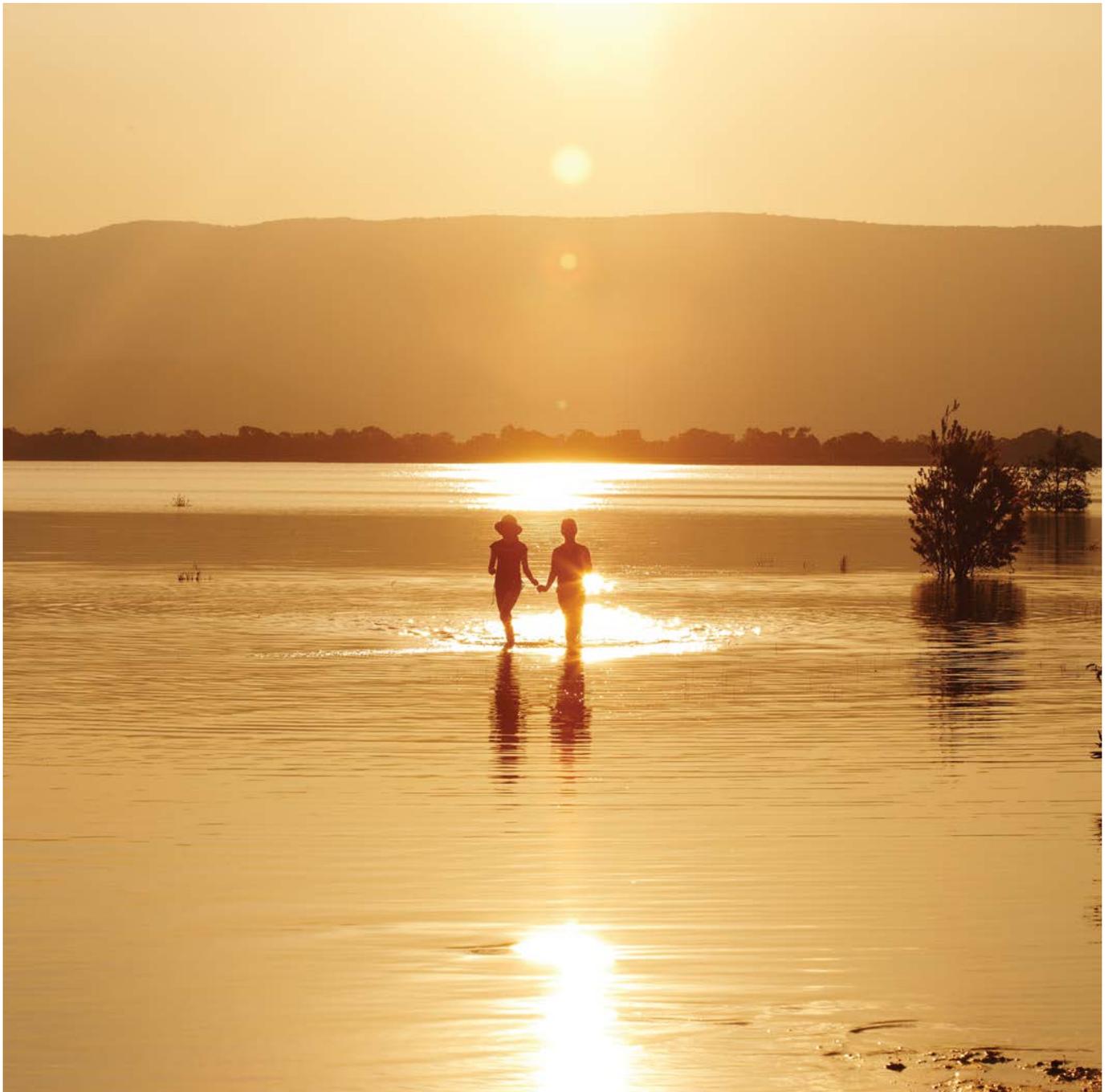


MACKENZIE FALLS

The iconic and spectacular MacKenzie Falls is a must do for all visiting the Grampians (Gariwerd) National Park. As one of the largest waterfalls in Victoria surrounded by beautiful green, lush and unspoiled scenery, it flows year-round and is among the most visited nature-based tourism sites across the State with over 600,000 visitors annually.



The Victorian Government is investing \$7.76m to revitalise the MacKenzie Falls visitor precinct and surrounding area, including the Zumsteins (Bun-nah) walking trail and day visitor area. This work will help cater for visitor numbers, manage visitor safety, and better protect the significant cultural, natural and recreational values of the area.



GREAT LAKES OF THE GRAMPPIANS

The Great Lakes and waterways of the Grampians region provides considerable environmental and recreational benefits and helps attract visitors and support increased length of stay.

As the largest gravity fed water distribution system in the world, our lakes and waterways include Lake Bellfield, Lake Fyans, Lake Wartook, Lake Bolac, Moora Moora Reservoir, Rocklands Reservoir, Green Hill Lake, Lake Toolondo and Lake Hamilton.

Whether it's fishing, kayaking, canoeing, paddle boarding, sailing, water skiing or swimming, visitors can enjoy a variety of water activities.

With the growing demand for lakefront views, the Great Lakes of the Grampians provides significant commercial opportunities for private investment in accommodation on crown land adjacent to the lakes, and on water including electric house boats and recreational activities.



**INVEST IN
THE GRAMPPIANS**



GRAMPIANS AND HENTY WINE REGIONS

The Grampians wine region is home to some of the world's oldest vines and is located against the backdrop of the magnificent Grampians and Pyrenees mountain ranges. Known for dense, purple and peppery shiraz and sparkling wines, the Grampians has been producing quality wine for more than a century and a half with a mix of large and boutique wineries surrounding the towns of Great Western, Ararat, Moyston, Halls Gap, Dunkeld, Tarrington and Hamilton.



While the Henty wine region has one of the coolest climates of Australia's mainland wine growing regions and covers Victoria's southwest. The region is known for its aromatic white wines, luscious sweet dessert wines and intense, finely structured reds.

Two recent accolades, from arguably the biggest awards in Australian wine, were awarded to Best's Wines in Great Western for the James Halliday 'Wine of the Year' and to Fallen Giants Vineyard in Halls Gap, taking home the Jimmy Watson Memorial Trophy.

INVEST IN
THE GRAMPIANS



MAJOR EVENTS

Events hosted in the Grampians allow visitors to experience our breathtaking natural assets, diverse communities and local hospitality. And our region is home to some iconic events including Grampians Grape Escape, the famous Stawell Gift at Easter and the Dunkeld Races.

As one of Australia's longest-running food and wine festivals, the Grampians Grape Escape is held in Halls Gap the first weekend in May and has been a celebration of Western Victoria's producers and makers for the best part of

30 years. The 2022 event was attended by almost 9,000 people and included exhibitor masterclasses and cooking demonstrations, live music and plenty of fun activities for the kids.

Over 60% of the festival goers came to the region specifically for the event, 92% said they'd likely attend the festival again and overall, 65% said they'd revisit the Grampians before the next festival. Such key events in the Grampians region are critical to increasing visitation, length of stay and showcasing our destination.



**INVEST IN
THE GRAMPAINS**



GREAT SOUTHERN TOURING ROUTE & INTERNATIONAL VISITATION

Grampians Tourism is a member association of the Great Southern Touring Route Inc (GSTR), regarded as one of the world's best road trips encompassing Melbourne, Geelong and the Bellarine, Great Ocean Road and the Grampians, and the Ballarat and Daylesford regions.

Supported by Visit Victoria and Austrade, GSTR was established to co-operatively market its member regions and participating products to the international travel trade allowing for greater reach and partnership opportunities.

Based on the YE Dec 19, there were 57,200 international overnight visitors to the Grampians,

up by 11.5% YE Dec 18. Visitors stayed for 275,900 nights in the region and represented over \$20 million in visitor expenditure.

International tourism has longer lead times and helps balance out domestic holiday patterns. It also provides a higher yield and spend with international travellers on average spending three times more than domestic travellers. Growth in international visitation is a key priority for GT. At present the UK, Europe and North America make up over 50% of all visitors. And while Asia is not a large market for the region, it's a long-term development opportunity with growth potential in both leisure and VFR.



**INVEST IN
THE GRAMPAINS**

MARKETING THE GRAMPIANS

Partnerships are essential to the success of our region. Together we are showing travellers why our spectacular Grampians region is a 'must visit' destination.

By highlighting our region's strengths and diversity and working in partnership with Visit Victoria, industry and stakeholders, we are building destination awareness, inspiration, consideration and intent in the minds of our target audiences.

Through targeted communications, campaigns and other marketing initiatives, we drive conversion through to visitation and dispersal by connecting visitors with the places, products and experiences they seek.

Our 'The Grampians Way' destination campaign continues to evolve, with regularly refreshed creative and messaging such as the **Piece together your ultimate road trip**

"jigsaw" puzzle designs which not only encourages dispersal throughout the region but also ensures that we own the Road Trip space in the minds of Victorians and our neighbours interstate.

We utilise PR, digital advertising, social media, media partnerships and collaborate with Visit Victoria, the Great Southern Touring Route and Tourism Australia to ensure that our region is top of mind.

In 2021/22 our audience grew over 10% and our overall digital marketing performance continued its upward momentum, with 18 million impressions, reaching more people, more times over this past financial year than ever before.

Highly engaged audience and industry-leading consumer reach

Combined audience

89,200

 45,100  44,100

Total impressions

18M

Advertising reach

3.8M

Combined annual reach

10,789,453

 5,475,632  5,313,821

Operator conversions

71,700

HIGH PRIORITY INVESTMENT OPPORTUNITIES

This list of high priority investment opportunities has been assessed against a number of weighted criteria and reflect the priority projects to facilitate the sustainable growth of the Grampians' visitor economy.

This list summarises the priority private investment opportunities that achieved a top 15 score based on the ranking methodology applied. Several other opportunities have also been identified and are contained in the supporting Grampians Strategic Tourism Investment Plan.

The projects are not listed in any priority order.

- **HIGH-END ECO-LODGE** (Ararat Region)
- **RIVER-EDGE RESTAURANT & FUNCTION CENTRE** (Horsham Region)
- **4-STAR HOTEL/RESORT** (Northern Grampians Region)
- **OFF-PARK LODGES LINKED TO THE GPT** (Southern Grampians Region)
- **BOUTIQUE BEVERAGE DISTILLERY** (Ararat and Southern Grampians Regions)
- **DESTINATION HOLIDAY PARK** (Horsham and Southern Grampians Regions)
- **INDOOR ACTIVITY CENTRE** (Northern Grampians Region)
- **GEOTHERMAL SPA EXPERIENCE** (Southern Grampians and Horsham Regions)
- **ECO-PODS** (Ararat Region and Northern Grampians Region)
- **WATERWAY ELECTRIC HOUSEBOATS** (Northern and Southern Grampians Regions)
- **LUXURY ACCOMMODATION** (Southern Grampians Region)
- **MOUNT ZERO RESORT** (Horsham Region)
- **GRAMPIANS WINE & PRODUCE DISCOVERY CENTRE** (Ararat Region)
- **TOURISM AVIATION HUB** (Horsham and Southern Grampians Regions)
- **3.5-STAR BRANDED BUSINESS & LEISURE HOTEL** (Ararat Region)

HIGH-END ECO-LODGE

ARARAT REGION

\$35m (CAPEX estimate)

Ararat has limited diverse and higher quality accommodation options. This results in economic leakage and a shorter visitor dwell time as visitors opt to stay outside of the area. To lift the quality of accommodation on offer in Ararat and to complement the high-quality environment, the opportunity exists to develop a higher-end eco-lodge.

Well-established and successful upmarket lodges often have a strong all year-round clientele with different experiences offered in summer and shoulder months compared to winter periods. Considering the excellent fishing options, hunting, cycling, trekking and bird spotting available throughout the broader area, potential should exist for year-round demand in the region.

Typically, these types of facilities may be characterised by:

- Absolute privacy reflecting the demands of the clientele and the need for exclusivity
- High-quality landscaping and, where appropriate, spas, hot tubs and pools
- Often offering 12 to 25 villas or luxury rooms with onsite staff accommodation due to their relative isolation and the need to engage highly skilled staff who expect to have accommodation on-site
- Offer a wellness centre that includes a high-quality day spa and yoga studio
- Exclusive dining options but with the potential for a smaller percentage of casual pre-booked diners
- Would need to be a greenfield development with stunning architectural features and on sites greater than 8 ha.

It is understood that there are potential sites linked to quality vineyards though no specific site has yet been identified. Finding one near/ amongst the LGA's wineries would be ideal.

High-quality Eco-lodge precedents

Spicers Peak Lodge, Maryvale, QLD; The Cradle Boutique Hotel, South Africa; Skyscape, Twizel, New Zealand



INVEST IN
THE GRAMPIANS

RIVER-EDGE RESTAURANT & FUNCTION CENTRE

HORSHAM REGION

\$3+m (CAPEX estimate)

Horsham Rural City Council has developed an exciting City to River Masterplan which plans for the long-term future growth of the Wimmera River Precinct and the Central Activities District. The Masterplan aims to transform and revitalise the area to make it a more attractive place to live, work, visit, play and invest in.

As part of the Masterplan, the potential for a riverfront restaurant is identified, along with an event/function facility. The facility could offer a valuable asset to support a large regional catchment area noting that some existing

facilities in the region are smaller and older now. The venue could also support a wedding and family function market along with the broader business and meetings market.

The CAPEX for this project is estimated at \$3+m, however, this is likely to vary depending on the size/scale of the facility developed. This project is strongly supported by Council as it is at a key location to help act as a catalyst for a number of other recreational and commercial development to occur as part of the Masterplan.

Horsham River to City Masterplan



4-STAR HOTEL/RESORT

NORTHERN GRAMPIANS REGION

\$45m (CAPEX estimate)

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

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

through the region to offer government services and support, health, energy, teaching, and other forms of services and with a budget which allows them to stay at better quality facilities.

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

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

Halls Gap



Great Western



INVEST IN
THE GRAMPIANS

OFF-PARK LODGES LINKED TO THE GPT

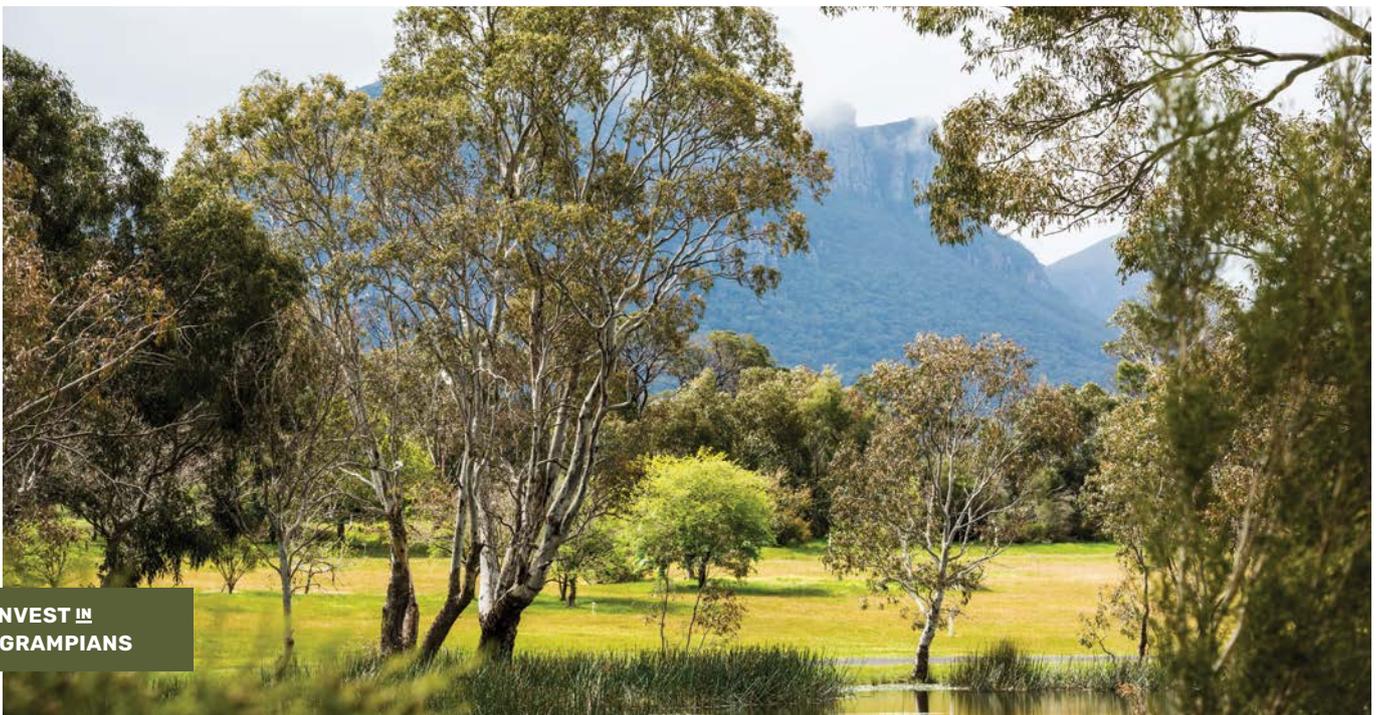
SOUTHERN GRAMPIANS REGION

\$15m (CAPEX estimate)

To bookend the GPT and in conjunction with the proposed Mount Zero Resort at the Northern gateway, the opportunity may exist for an off-park lodge at Dunkeld or surrounds to offer a Southern accommodation anchor for the trail.

The lodge could comprise a 3-star eco-style property with 20 to 30 rooms. It could offer GPT walkers a place to stay post-walk and also allow shorter walks to be undertaken on the trail with walkers staying at the eco-style property, as not everyone will want to walk the entire 13 day trail, but may wish to consider shorter options including half and full day walks in the region.

Dunkeld & surrounds landscapes



INVEST IN
THE GRAMPIANS

BOUTIQUE BEVERAGE FACILITY

ARARAT AND SOUTHERN GRAMPIANS REGIONS

\$6m (CAPEX estimate)

The Grampians has a solid profile as a wine production and agricultural region. The potential exists to build on this profile and introduce, by perhaps using a re-purposed industrial building, a distillery: gin, vodka or tequila, or a cider house or craft beer brewery.

These types of facilities offer an exciting mechanism to encourage more visitors to stop and stay in the area, especially where the facility can also offer tasting sessions, guided tours, meals and a venue for events and functions which support local community needs as well.

Using natural ingredients to create unique tastes, from wildflowers, berries, barks etc, the facility could generate both a very strong local market and a seasonal visitor market.

Ideally, a suitable site could be in and around the main street of Ararat or Hamilton, where visitors can undertake a tasting and/or a meal, then walk back to their accommodation. Space-wise, gin, vodka or tequila distilleries take up little industrial space, unlike whisky distilleries which require a larger footprint.

The capital cost to set up a small distillery can vary markedly depending on the facility being retrofitted and the quality of fit out being applied, but in broad terms, could cost circa \$6m-plus as the cost could be far greater depending on the type of facility and location.

Distillery precedents

Kalki Moon Distilling & Brewing, QLD; Borough Market Gin Distillery, UK; Wildbrumby Schnapps Distillery, NSW; Fossey's Distillery, VIC.



**INVEST IN
THE GRAMPIANS**

DESTINATION HOLIDAY PARK

HORSHAM AND SOUTHERN GRAMPIANS REGIONS

\$45m (CAPEX estimate)

Current market demand for powered caravan, RV and camping sites has outstripped supply throughout many locations Australia-wide. While there are some caravan and camping facilities in Horsham and the broader region, these are limited and are often of a fairly basic standard. What is missing is a true destination holiday park that could offer circa:

- 15 to 25 eco cabins of a good standard
- 50 to 70 powered camping and caravan/RV sites
- 60-100 room key hotel

Supporting family-friendly recreation facilities such as a high rope course, mini pump track, a water splash pad/swimming facility, mini-golf, etc.

Noting that people who book branded destination holiday parks will often expect these and other value adds as part of the brand's appeal.

A new true destination holiday park would offer the potential for far more visitors to stay in the Horsham/Southern Grampians regions than currently, and for a longer length of time as they could base themselves and undertake day excursions from the site.

It is especially important to deliver a quality product to appeal more widely to the RV/caravan market as well as the growing family market, which recent trends indicate are coming to explore regional areas of Victoria and which may include a trip into South Australia as well.

For Horsham, a possible potential site has been identified within the grounds of the Horsham Golf Club. The Golf Club is keen to investigate options for leasing and/or selling the site to a quality destination holiday park developer/operator.

Destination holiday park precedents

North Star Holiday Resort, NSW; Port Fairy Holiday Park, VIC; BIG4 Traralgon Park Lane Holiday Park, Latrobe Valley, VIC.



**INVEST IN
THE GRAMPIANS**

INDOOR ACTIVITY CENTRE

NORTHERN GRAMPIANS REGION

\$8m (CAPEX estimate)

Aside from free outdoor activities, the region currently offers limited family-friendly activities, and virtually no indoor all-weather experiences, aside from galleries and museums which are very passive in their offering.

While visitors love Halls Gap and its accessibility to Grampians (Gariwerd) National Park, there are limited things to do when the weather conditions make undertaking activities within the National Park problematic.

To leverage Halls Gap's profile as a nature-based recreational hub, the opportunity exists to investigate the development of an indoor activity centre which would not only provide an all-weather attraction, but also a year-round activity for visitors and locals to participate in during all seasons. This facility could offer rock climbing, bouldering, high ropes and aerial courses, trampolining etc.

It may also be used as an official training base for institutes of sport with the potential to eventually morph into a high-performance sports centre. It could also provide an important training space for various other sportspeople when not in general use so may have several complementary user groups to appeal to.

The ability to offer rock climbing could also potentially address some of the challenges associated with rock climbing in Grampians (Gariwerd) National Park by offering visitors and locals an alternative and safer option.

As this facility could offer a variety of paid attraction uses and government sports centre facilities, it should be developed as a public-private partnership project and with the potential to develop it in stages

Indoor activity centre precedents

Climbfit, Kirawee, Sydney; Swiss Mega Park, Switzerland; Chu Pea Park, Japan; Supaworld Hobart, Tasmania; Ninja 101, Sydney



INVEST IN
THE GRAMPIANS

GEOHERMAL SPA EXPERIENCE

DUNKELD AND/OR HORSHAM REGIONS

\$7.5m (CAPEX estimate)

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

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

The market attracted to spa tourism is generally a higher-yielding market with a propensity to

spend on higher-quality accommodation options and related quality food and beverage services.

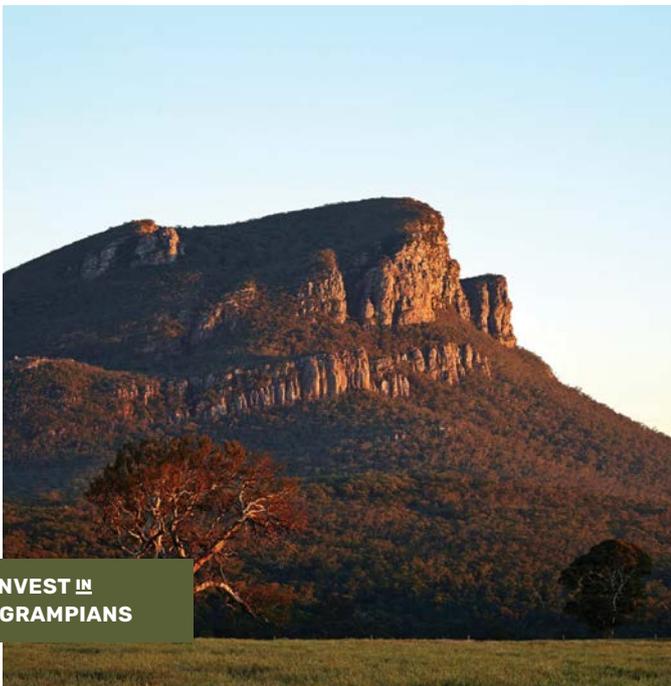
The Southern Grampians or Horsham regions appear to be best suited out of the four LGAs for the development of a geothermal spa experience given its ground temperatures and based on geothermal mapping in the region. Both have a geothermal capacity which could offer hot pools and spa facilities.

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

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

Spa/geothermal experience precedents

Hamner Springs, NZ; Tekapo Springs, NZ; Peninsula Hot Springs, VIC; Wickens at the Royal Mail Hotel, VIC.



**INVEST IN
THE GRAMPAINS**



ECO-PODS

ARARAT AND NORTHERN GRAMPIANS REGIONS

\$6.5m (CAPEX estimate)

The potential exists to develop a quality upmarket eco-pod facility with a suggestion of up to 12 eco-pods rather than standard glamping tents. The region has some magnificent landscapes which provide unique environments for positioning a glamping operation, but climatic conditions do require a pod-style of accommodation to offer comfortable and warm accommodation all year round.

Council is keen to work with suitably skilled operators and developers to find locations.

And to ensure highly sustainable environmental infrastructure can be provided to allow eco-pods to be introduced in a suitable quality location.

Because of seasonal weather patterns, it would likely require a robust and all-weather style of eco-pod rather than a more lightweight sub-tropical style of tent amenity.

Based on comparative examples, the likely capital cost is thought to be circa \$6.5m including eco-pods, supporting back of house facilities and camp-style dining etc.

Eco-pod precedents

Ridgeback Lodge, Canada; Treebones Resort, USA; Bubble Tents, Mudgee, NSW; CABN, Adelaide SA.



INVEST IN
THE GRAMPIANS

WATERWAY ELECTRIC HOUSEBOATS

NORTHERN AND SOUTHERN GRAMPIANS REGIONS

\$5m (CAPEX estimate)

The Grampians region offers several highly attractive waterways. Many of these are underutilised as tourism assets and have the potential to play a far greater role in encouraging visitation to the region, providing that access to the water and required licenses from regulatory bodies are possible.

The introduction of electric houseboats onto some of the region's waterways will provide a new joint attraction experience and a unique accommodation category while complementing the high-quality natural environment. Electric

houseboats offer an alternative to fuel-powered boats and are far quieter, more efficient and far more environmentally friendly.

Lake Bellfield, Lake Fyans and Rocklands Reservoir would appear to be suited to this type of boating activity but further research would need to be undertaken with relevant government agencies to scope this out.

The \$5m capital cost that has been estimated for this project may enable the purchase and fit out of 4 to 6 electric houseboats catering for 4 to 6 people each.

Electric & solar houseboat precedents



Potential houseboat location: Lake Bellfield



Potential houseboat location: Rocklands Reservoir



Potential houseboat location: Lake Fyans



INVEST IN
THE GRAMPIANS

LUXURY ACCOMMODATION

SOUTHERN GRAMPIANS REGION

\$7m (CAPEX estimate)

The opportunity may exist to develop a smaller-scale luxury accommodation property at Dunkeld or surrounds to support a longer length of visitor stay in the region and to provide more accommodation offerings for visitors to Dunkeld and the wider region.

Visitor length of stay is expected to increase, as those walking the GPT end at the southern trailhead and are being encouraged to stay in the region for longer and take part in other experiences.

A luxury unit/chalet style of development may be appropriate which can also be staged and added to over time if market demand is shown to support this. There is currently very limited quality accommodation in the broader region other than units provided at the Royal Mail Hotel and in associated B&B accommodation.

The CAPEX that is estimated for this project includes the development of 6-8 luxury units/chalets as an initial first stage of development only.

Dunkeld landscape



INVEST IN
THE GRAMPIANS

MOUNT ZERO RESORT

HORSHAM REGION

\$30m (CAPEX estimate)*

A luxury nature-based resort is proposed in Laharum, on the edge of the Grampians (Gariwerd) National Park. Once completed, the resort could be the premier accommodation in the Grampians.

The resort's excellent location offers magnificent views of Mount Zero and the National Park. The resort will provide a hub to explore the park and is close to Mount Zero Picnic Ground and the northern trailhead of the Grampians Peaks Trail. It is the perfect location for visitors to base themselves to explore the Grampians or unwind in one of Victoria's truly unique landscapes.

The proposed development concept, to be delivered in stages, incorporates the development of eventually up to 110 short stay accommodation units and integrates a range of accommodation options including self-contained eco-style lodges, bowers, glamping and camping.

Stage 1 of the development will include the construction of 40 lodge-style villas, a function centre with a restaurant and cote

(the Pavilion), a spa and wellness facility as well as associated car parking and landscaping.

Stage 2 is estimated at \$10m and includes glamping and camping sites and facilities.

Award-winning architects and landscape designers have prepared a design concept for an integrated resort development. From the palette to its architectural form, the resort is inspired by its surroundings and designed to blend into the bushland environment.

Forecast financial outcomes as advised, include the following:

- Estimated average room rate= \$470 incl. GST
- Project internal rate of return (IRR)
 - Unlevered** = 22.5%
 - Levered***= 29.6%

* Project has development approval including State Government Funding Support. Currently seeking investors.

** Unlevered IRR or unleveraged IRR is the internal rate of return of a string of cash flows without financing.

*** Levered IRR or leveraged IRR is the internal rate of return of a string of cash flows with financing included.

Concept Plan



Strategic location on the GPT



Resort Lobby



Lagoon Spa and Wetlands



Lodging



Bowers



Aerial View



INVEST IN THE GRAMPAINS

GRAMPIANS WINE & PRODUCE DISCOVERY CENTRE

ARARAT REGION

\$18m (CAPEX estimate)

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

Many vineyards and winemakers nationwide indicate they are keen to explore tourism uses on-site but are challenged by issues including insurance, finding sufficient staff and biosecurity issues. This is often the case for more boutique producers.

To help overcome this, the potential exists to develop a regional wine and produce showcase centre or emporium. This could feature the region's vineyards, offer a shopfront for

the vineyards and, potentially on a rotating basis, offer tastings. To assist with project commercial viability, a pop-up and seasonal facility is suggested until it can be a permanent facility with secure revenue streams.

Because of the strength of some of the food producers/growers in the region (olives etc), the potential also exists to investigate including them in the centre so the facility becomes a true showcase of the best of the Grampians' produce.

The CAPEX for this project is estimated at \$18 million, although a pop-up version would come at a significantly lower capital cost. As the facility could offer a strong retail facility and dining option as well as displays, it is suggested as either a private sector initiative or a potential public-private partnership.

Wine and produce emporium precedents

Paesanella Food Emporium, Marrickville, NSW; National Wine Centre, Adelaide, SA; Pialligo Food Emporium, Canberra, ACT



INVEST IN
THE GRAMPIANS

TOURISM AVIATION ACTIVITY HUB

HORSHAM AND SOUTHERN GRAMPIANS REGIONS

\$1.4m (CAPEX estimate)

The Horsham Rural City Council is keen to further activate the Horsham Aerodrome to support several longer-term uses including air access for visitor markets to the region and various aviation-based business enterprises. To achieve this, it would include investigating the introduction of tourism-based recreational aviation experiences. This includes, but is not limited to, the following:

- Eventual scheduled regular passenger services and scenic flights for the wider region
- Gliding and training
- Paragliding
- Parachuting
- Light aircraft training school
- Microlights

- Potentially a hub for visitation by light aircraft visitors (flying in) needing parking for aircraft, refuelling and basic maintenance.

The airfield already supports some of these uses such as the rural fire service, medical flights, and a limited business market. Being slightly further away from more alpine terrain is also likely to assist with encouraging various tourism aviation experiences as noted above.

The aerodrome already has several private businesses operating from it with the potential to consider relocating some existing businesses and establishing more industrial park-style facilities on this site, rather than within the Horsham CBD.

The Southern Grampians Shire Council is also interested in offering an expanded aviation hub in Hamilton to support a range of leisure, business and community aviation linked requirements.

Horsham Aerodrome



3-4-STAR BRANDED BUSINESS & LEISURE HOTEL

ARARAT REGION

\$45m (CAPEX estimate)

While noted as a hub for business, Ararat currently struggles to attract strong overnight visitation because of a lack of accommodation. Council is therefore keen to encourage stronger accommodation options of a higher standard to support greater business travel to the region.

The opportunity exists to investigate the development of a 3-4 star, 60-80 room branded accommodation property to cater to this business market, along with a leisure market looking for higher quality accommodation.

Council has identified a potential vacant site within the CBD (247 Barkly Street) that could offer an ideal location for development. This is close to major city assets and F&B providers.

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

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

Hotel development precedent – indicative example only Quest Griffith, NSW



INVEST IN
THE GRAMPIANS

CONTACT US NOW TO BE PART OF VICTORIA'S NEXT MAJOR INVESTMENT UPLIFT

Grampians Tourism was established in 2009 and is the peak industry body for tourism in the Grampians region and is directly supported by the Victorian State Government, Ararat Rural City, Horsham Rural City, Northern Grampians Shire and the Southern Grampians Shire, and over 300 industry partners.

Our primary purpose is to deliver a coordinated approach to investment attraction, product and industry development, and destination marketing for the region.

Our key assets include:

Destination Marketing: www.visitgrampians.com.au

Grampians Peaks Trail: www.grampianspeakstrail.com.au

Live The Grampians Way: www.grampianslife.com.au

Invest The Grampians Way: www.investgrampians.com.au

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If looking to invest in the Grampians, you will find a region that is open for business and takes a very proactive approach to supporting investment and development.

Grampians Tourism works in partnership with local government and can assist with:

- Introductions to project proponents throughout our region
- Finding the right site/location
- Putting you in touch with key Council contacts
- Identifying partners, investors, developers and operators
- Helping to facilitate planning applications for key developments
- A full range of business support programmes, from helping with grant/loan assistance to linking with tertiary education facilities to help access apprentices and workers across the tourism sector.



Ararat Rural City

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Destination images used throughout this document have been sourced from Visit Victoria's Content Hub.

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