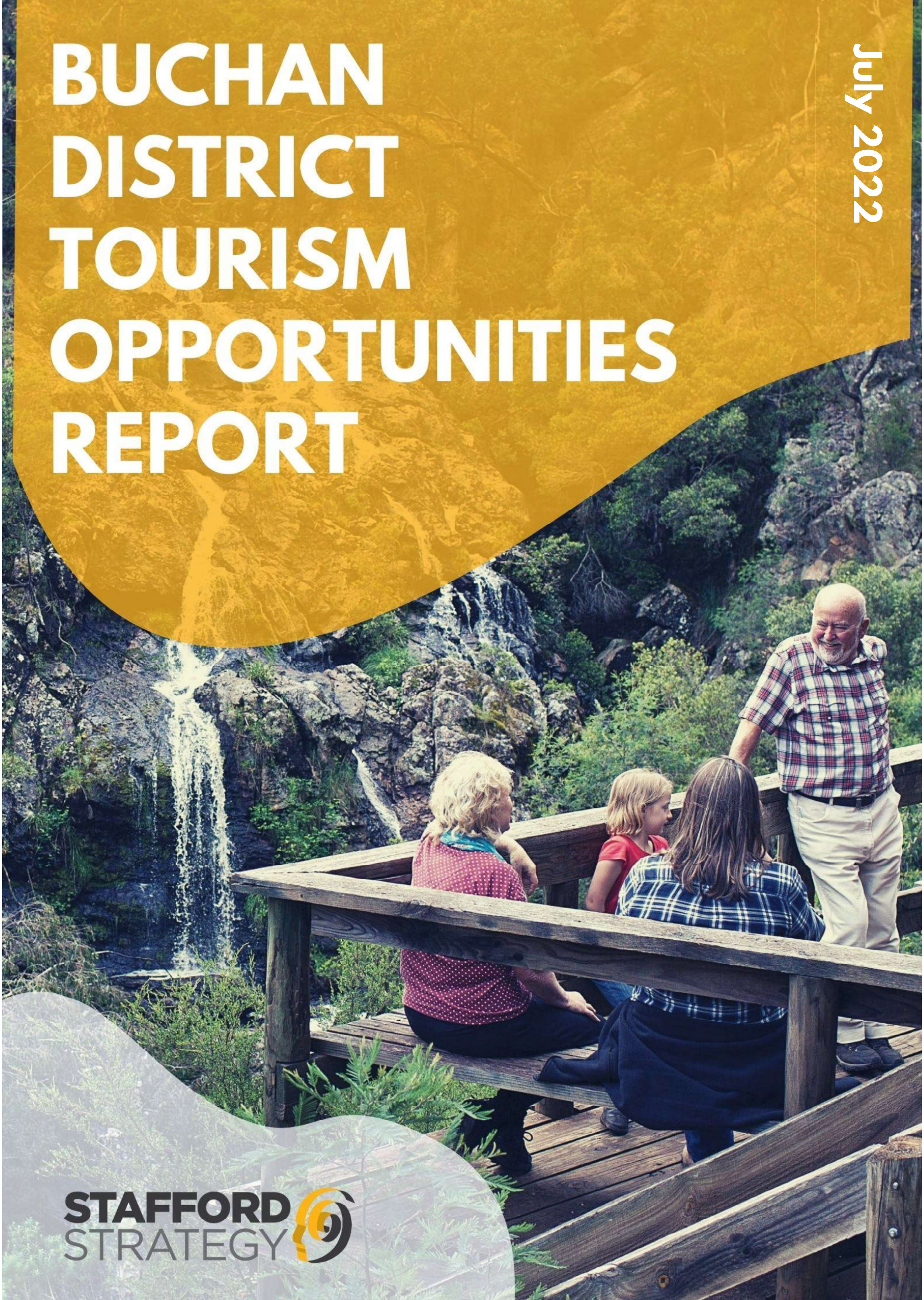
BUCHAN DISTRICT TOURISM OPPORTUNITIES REPORT

July 2022



STAFFORD STRATEGY

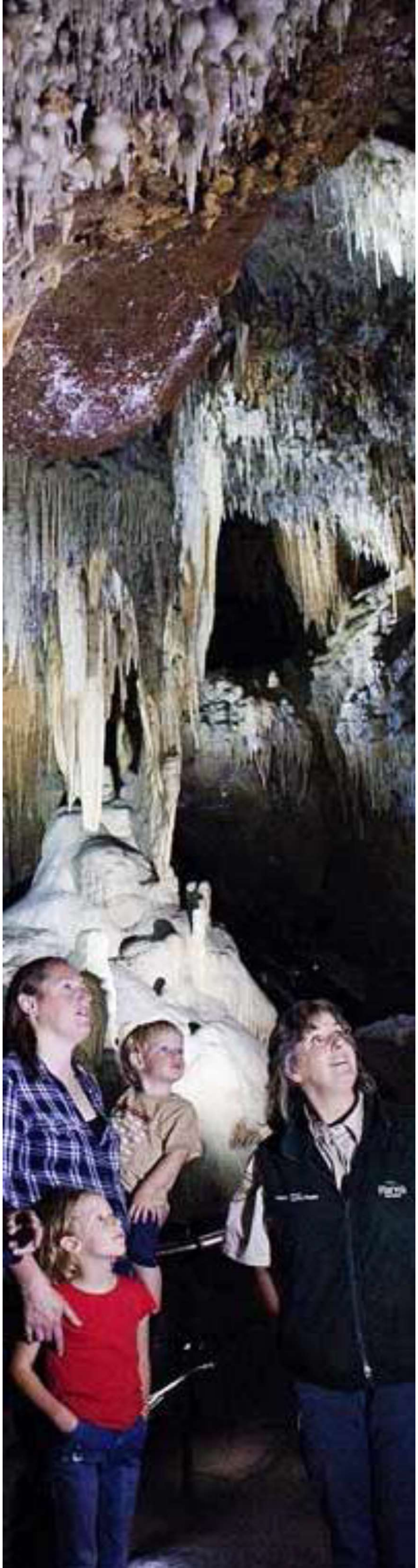
staffordstrategy.com.au **ACN** 079 055 100 **ABN** 34 565120 454

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

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

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

WELLINGTON OFFICE
A Level 1, 2 Broderick Road, Johnsonville 6037, Wellington, NZ
E wellington@staffordstrategy.com.au
P +64 21 337 377



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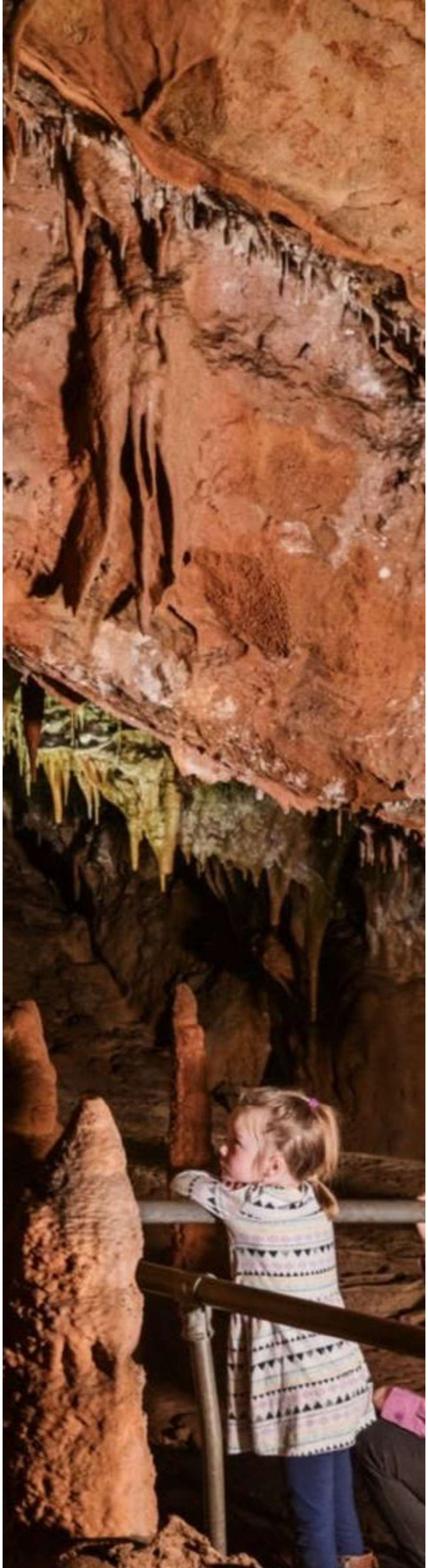


EXECUTIVE SUMMARY

Introduction

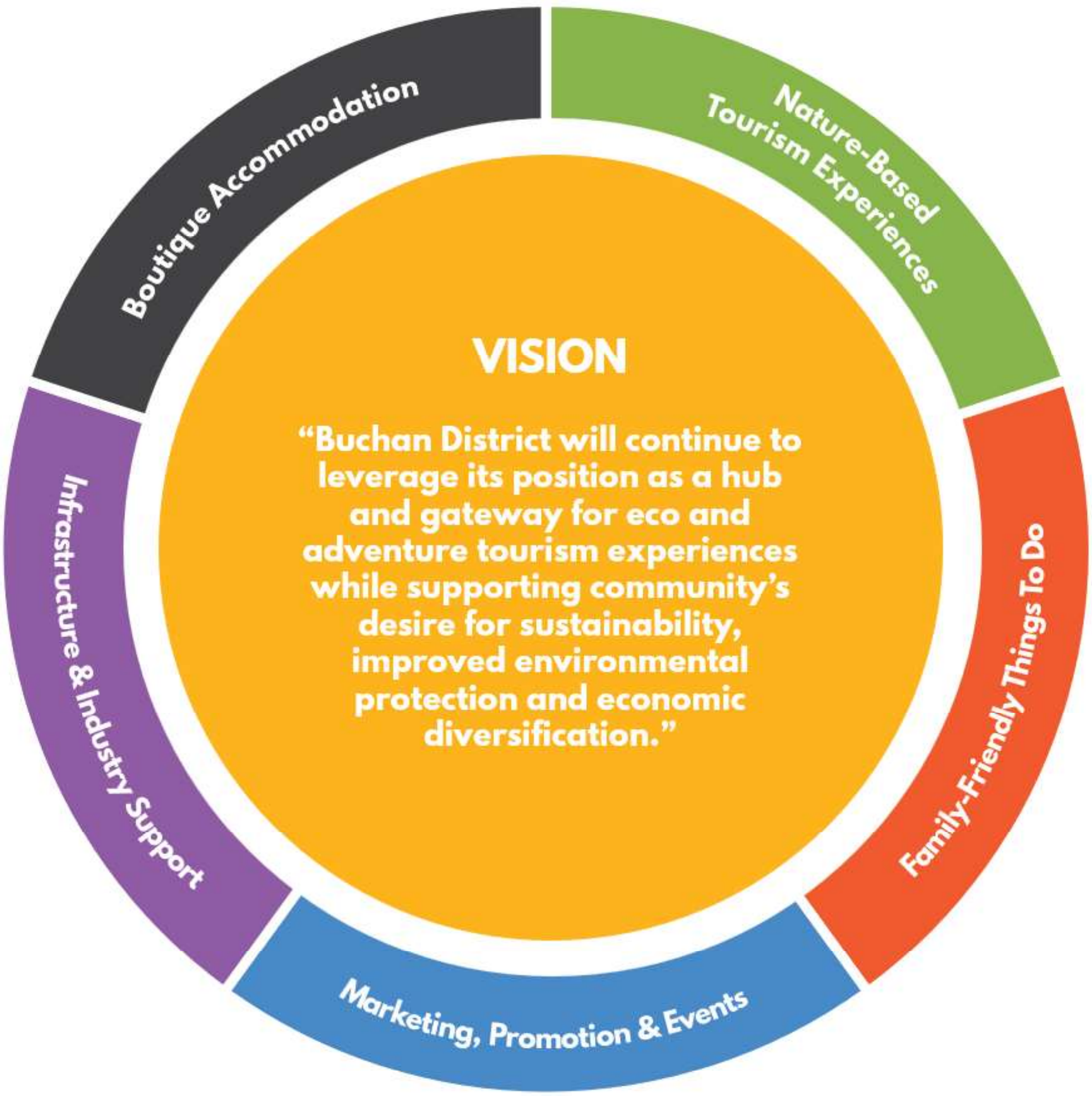
Buchan District is situated in the East Gippsland region of Victoria and is located adjacent to the Buchan River, upstream from the river's junction with the Snowy River. The district is home to the region's major visitor attraction (Buchan Caves, a major underground cave system and Buchan Caves Reserve) as well as a number of spectacular limestone-rich valleys, hills and an abundance of megafauna history.

This Tourism Opportunities Report (TOR) has been created to provide strong direction and associated actions to drive the sustainable development of tourism in Buchan District (the district). Among other things, the TOR aims to: identify new tourism product that meets future visitor expectations and demand; identify infrastructure requirements to support the ongoing sustainable development of tourism in the district; and provide a focal document for the sustainable development of tourism in the district. It provides a blueprint for visitor economy growth to support bushfire recovery and focuses on opportunities to increase the benefits derived from growing the visitor economy in the district.

This TOR has adopted a collaborative planning approach, bringing together the wide variety of operators and agencies involved in activating the district's visitor economy. For this TOR to be successful, this collaborative approach needs to be ongoing, with agencies and operators working closely together to activate the recommendations identified.

Most importantly, this TOR deliberately aims to drive tourism opportunities from a community level, it is not a TOR-down agency-driven approach. The Buchan District community is passionate about preserving its environment and improving liveability for locals. Tourism activation initiatives identified in this TOR are, therefore, focused on a series of smaller carefully crafted steps to enable the community to remain in control, and to encourage various agencies to work in partnership, to achieve highly sustainable outcomes. As a result, activations may take longer to implement because of the need to adopt smaller steps forward that are driven by local community members.

Figure 1: TOR Strategic Framework



Buchan District Visitor Profile

Figure 2: Buchan Visitor Profile (2021)[1]

142,300

Total Visitors (2021)

55% - Domestic Day

44% - Domestic Overnight

1% - International Overnight

Visitor Type (2021)

$36.4 million

Visitor Spend (2021)

59% - Holiday

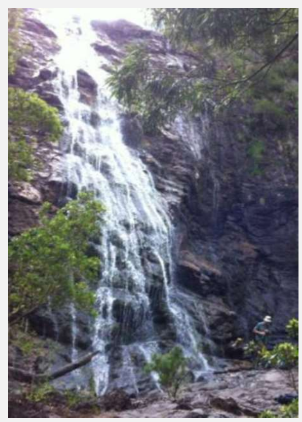
24% - VFR

10% - Business

7% - Other

Visitor Motivation (2021)

Buchan Caves



Little River Falls

Various Walks

TOR Things to Do[2]

[1] All data, unless otherwise specified, is sourced from Tourism Research Australia's National and International Visitor Survey. Because drilling down to an SA2 involves small sample sizes, data needs to be interpreted with care.
[2] Based on TripAdvisor and Google Travel

Recommendations

Boutique Accommodation

Introduce new accommodation products to diversify the district's accommodation base and support greater overnight visitation.

- Advocate for upgrades to the Balley Hooley Camping Area
- Assess opportunities to expand the district's accommodation base
- Introduce an eco-cabin design as boutique accommodation

Nature-Based Tourism Experiences

Introduce a range of new and enhanced tourism experiences that showcase the district's attractive remote wilderness in a sustainable manner.

- Wild caving tours
- 4WD tours and training
- Fishing and hunting tours with licensed guides
- Drive trails ex-Buchan
- Mountain Biking circuits
- Nature tours
- White water rafting and kayaking tours
- Overnight horse treks

Family-Friendly Things to Do

Develop a range of experiences that not only cater to families but also offer all-weather experiences to help address seasonality and provide things for families in the community to do.

- Megafauna Discovery Centre
- Pump track
- Children's playground
- The Bluff Reserve development with a seasonal light show
- Redevelopment of the Buchan Butter Factory

Marketing, Promotion & Events

Strengthen the destination brand proposition of the district through industry up-skilling, brand development and an enhancement of the district's digital presence.

- Profiling of local legends
- Smaller-scale events/expanded events calendar
- Media library
- Destination events calendar
- Destination branding & greater profile on Visit Gippsland and Visit East Gippsland websites
- Host community tourism awareness-raising campaign
- New forms of visitor servicing

Infrastructure & Industry Support

Ensure that investment in key infrastructure and visitor servicing meets community needs and also delivers to the various visitor markets.

- Development of overflow parking
- Improvements to One Tree Hill Lookout
- Development of an RV dumpsite
- Integration strategy for wider visitor precinct
- Industry upskilling workshops (social media, digital literacy, IT, marketing, and finance up-skilling)
- Tourism investment strategy
- Wayfinding Signage
- Review of public toilets facilities

The Priority Projects

Community members and other stakeholders have indicated the following as the priority projects to start with. Once completed, other projects can also be activated when the community is ready for them. Importantly, some of these projects will need to be activated by community-private funding, others are publicly funded (new or existing), and some are potential public and private partnerships.

The brief for this TOR was to find activations that the community and local industry operators could activate, whilst avoiding a scenario of all projects being driven and/or funded by public agencies and their funding sources.

> Boutique Accommodation

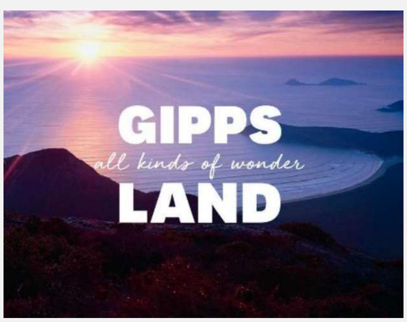
- **(PFE)** Advocate for upgrades to the Balley Hooley Camping Area
- **(PRFN)** Introduce an eco-cabin design as boutique accommodation

> Nature-Based Tourism Experiences

- **(PRFN)** Wild caving tours
- **(PRFN)** 4WD tours and training
- **(PRFN)** Fishing and hunting tours with licensed guides

> Family-Friendly Things to Do

- **(PFN)** Megafauna Discovery Centre
- **(PFN)** Pump track
- **(PFN)** Children's playground
- **PPPN)** Redevelopment of the Buchan Butter Factory



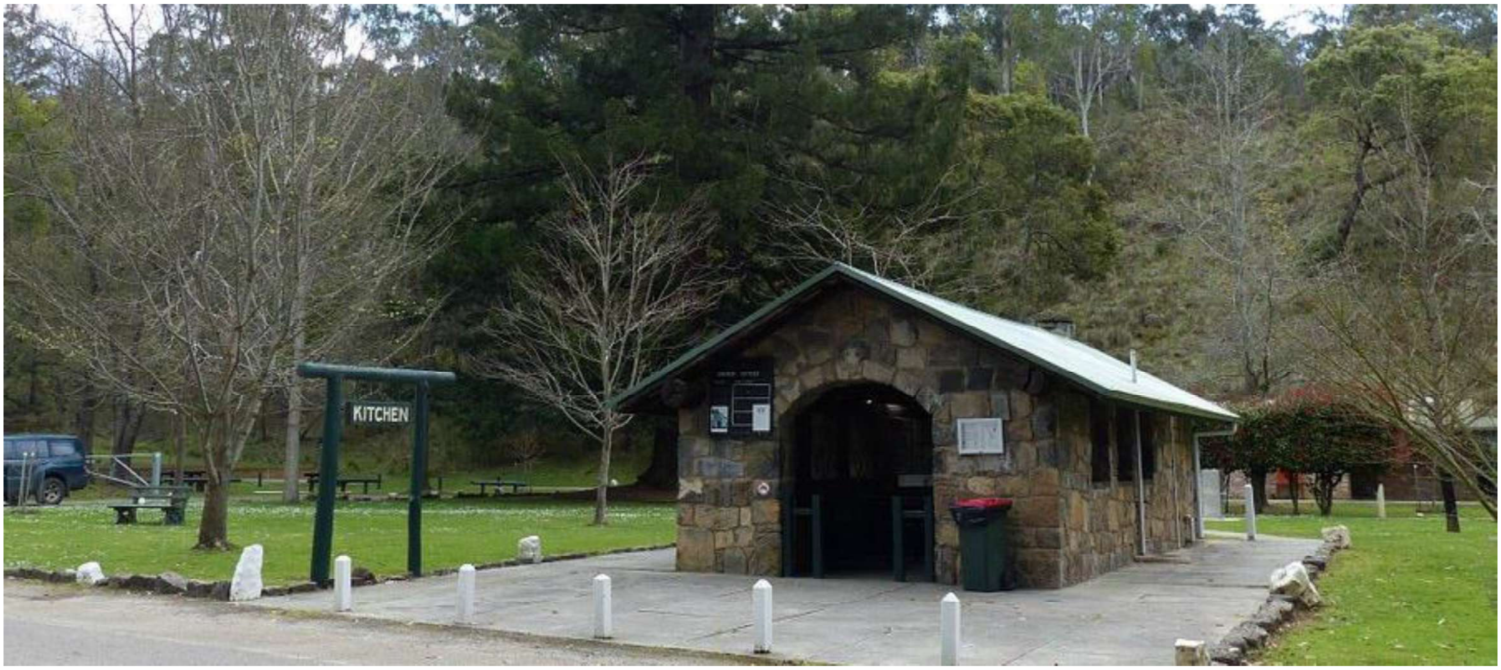
> Marketing, Promotion & Events

- **(PFN)** Destination branding & greater profile on Visit Gippsland and Visit East Gippsland websites

> Infrastructure & Industry Support

- **(PFN)** Development of overflow parking
- **(PFN)** Integration strategy for wider visitor precinct in Buchan main street
- **(PFN)** Improvements to One Tree Hill Lookout
- (**PRFN)** Development of an RV dumpsite

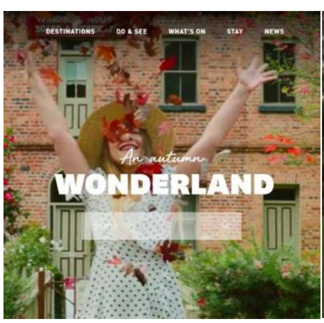
PFN = Public funded, new project | PFE = Public funded, existing project | PRFN = Private funded, new project | PPPN = Public private partnership, new project



The Top 4 Projects

The priority projects were workshopped with the Buchan District community and the following were identified as the top four projects to initially pursue. These offer an immediate starting point and highlight a good mix of community-local operator-driven initiatives along with some which require the involvement of the Council to help facilitate some projects.

Each of these priority projects is aimed at increasing the length of visitor stay in the district, along with higher visitor spend levels.

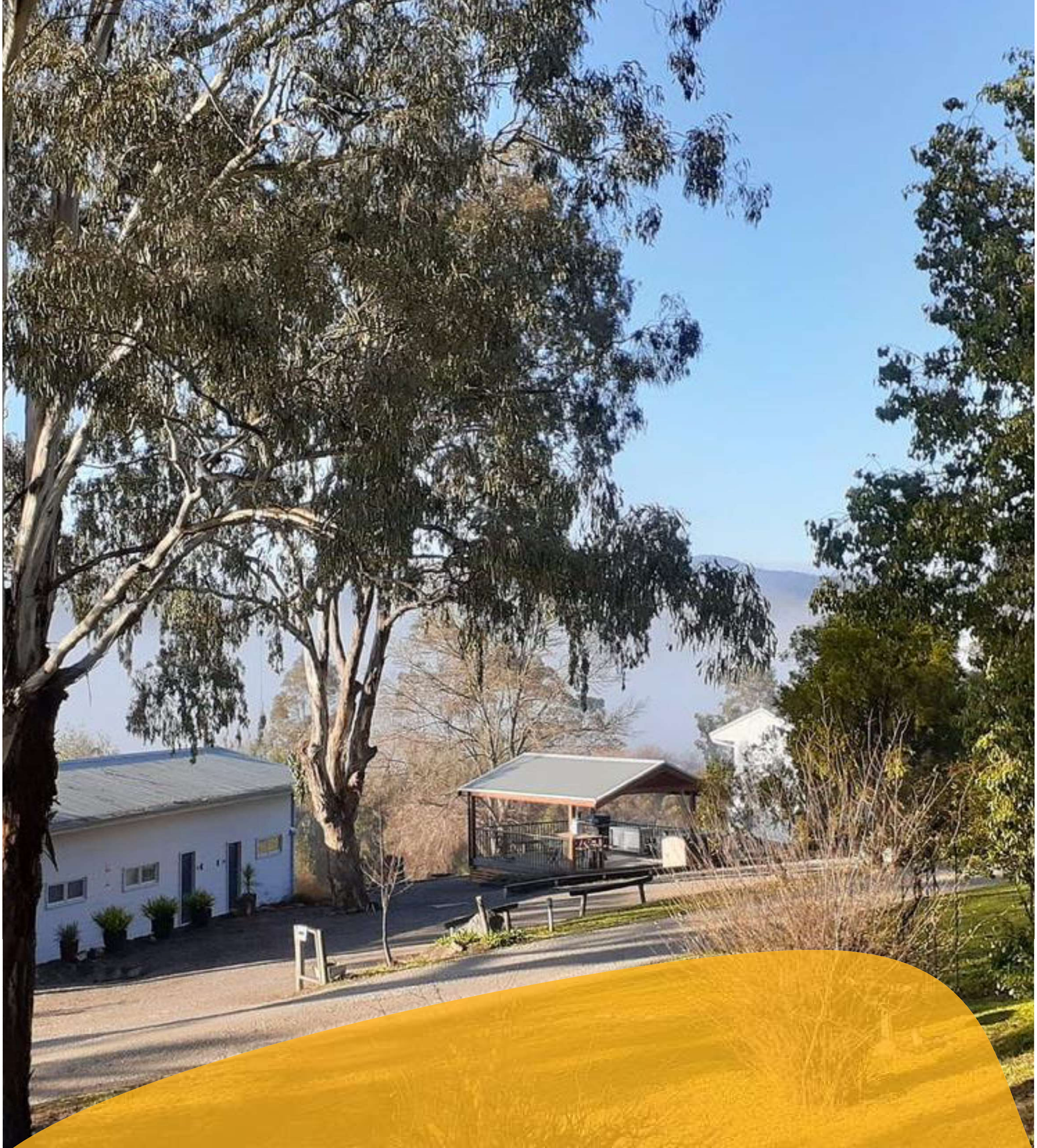


Destination branding & greater profile on Visit Gippsland & Visit East Gippsland websites

Redevelopment of the Buchan Butter Factory (note that the external walls have previously been used as a cinema screen for local entertainment and the building has also been used previously as a backdrop for performances)

Children's playground (for local community use first and foremost and to encourage a family market)

Pump track (for local community use first and foremost and to encourage a family market)



PART 1: STRATEGIC CONTEXT

Setting the scene regarding tourism in the district including historic visitation, visitor spending, the product available and barriers to growth as a destination.

1.1. ABOUT THIS TOR

1.1.1. Overview

The purpose of this Tourism Opportunities Report (TOR) is to provide strong direction and associated actions to drive the sustainable development of tourism in Buchan District (the district). Among other things, the TOR aims to:

- identify new tourism product that meets future visitor expectations and demand;
- identify infrastructure requirements to support the ongoing sustainable development of tourism in the district; and
- provide a focal document for the development of tourism in the district.

Importantly, the TOR is not just about visitor market growth, but also about visitor experience and management. The TOR, therefore, adopts a destination management approach, rather than purely focusing on destination marketing and promotion.

1.1.2. The approach followed

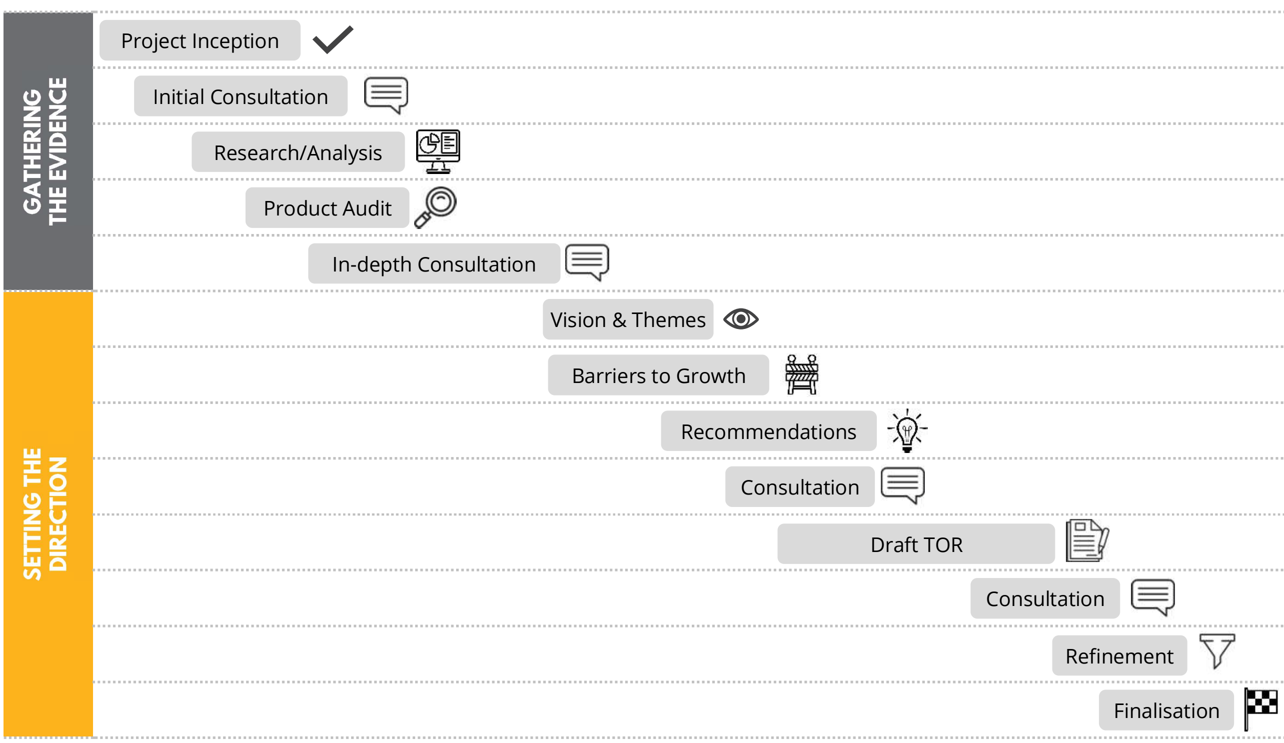
Working alongside those directly involved in the visitor economy in the district, this TOR was developed via a 13-stage process, which is outlined in Figure 3.

The project involved extensive consultation with a wide variety of stakeholders across the public and private sectors.

Stafford would like to take this opportunity to thank all those who have contributed to the development of this TOR. The contributions from stakeholders were invaluable to the development of this robust and pragmatic TOR which deliberately sees most projects driven from the community level upward.

Importantly, this TOR is not a destination management plan, it is solely focused on tourism development opportunities with most being driven by community-local operators from a community level upwards.

Figure 3: Stages followed to complete this TOR



1.1.3. Definitions

For clarity, Table 1 explains a variety of terms used throughout the TOR.

Table 1: Definitions

Who Is a Visitor?	For the purpose of this TOR, a visitor includes all those travelling to the district, either for a day trip or staying overnight, for a variety of reasons, including for leisure/holiday purposes; events (including sports, cultural and arts events and conferences); business-based travel; visiting friends and relatives (VFR); medical tourism; educational purposes; and employment purposes. 
What is the Visitor Economy?	The visitor economy accounts for the fact that visitor activity does not occur in isolation, but rather, contributes to investment in jobs across a broad range of industry sectors. This includes all industries that directly and indirectly serve visitors, ranging from accommodation and tourism operators and attractions to broader goods and services such as retail and food and beverage industries. As tourism is not a defined industry sector on its own, but rather the amalgamation of a variety of industry sectors including accommodation, food, and beverage etc., the full extent of what comprises the visitor economy and its reach across many elements of the broader economy is often not fully understood.
What is a Social Licence to Operate?	The concept of social licence to operate (SLO) has its origins in the late 1990s in the extractive industries and has since been adopted within the wider business context. There is not one commonly accepted definition of SLO, however, community acceptance and approval of commercial operations are recognised as critical features of the concept. Although society as a whole 'issues' the SLO to businesses and organisations, it is usually local communities who are the 'key arbiter' of the terms of the SLO[3].

1.1.4. This TOR in in the local, regional, and national setting

There has been a range of strategies and projects completed, or that are currently underway, which directly or indirectly link to tourism. Each of these has been reviewed and, where applicable, integrated into this TOR. This is an important component of destination management planning to ensure that there is alignment between this TOR and the hard work that has already been undertaken by a range of stakeholders. Table 2 provides a listing of these.

Table 2: Plans/Strategies/Projects/Databases Assessed

Level	Plan/Strategy/Database
State & Federal	■ Australian Tourism Data Warehouse ■ National and International Visitor Surveys, Tourism Research Australia ■ Victorian Visitor Economy Strategy, Business Victoria ■ THRIVE 2030 (The Re-Imagined Visitor Economy), Austrade
Regional	■ Towards 2030 Gippsland Destination Management Plan, Destination Gippsland ■ Gippsland Regional Tourism Summary, Business Victoria ■ Destination Gippsland A Toolkit for Tourism Marketing, Destination Gippsland ■ Regional Digital Plan Gippsland, Regional Development Victoria ■ Gippsland Regional Growth Plan, Regional Development Victoria
Local	■ Buchan and District Community Plan 2017—2021, East Gippsland Shire Council ■ Well Placed for Wellbeing, East Gippsland Shire Council ■ Shaping the Future - Our Community Vision 2040, East Gippsland Shire Council ■ Council Plan 2021-25, East Gippsland Shire Council ■ Event Growth Action Plan 2021-2026, East Gippsland Shire Council ■ Visitor Services Membership Program, East Gippsland Shire Council

[3] New Zealand Sustainable Business Council, 2013

1.2. CONSULTATION

This TOR has been informed by extensive consultation undertaken with a large number of stakeholders from the district as well as those external to the area.

There were four primary phases of consultation undertaken.

- **Stage 1:** Occurred at the commencement of the project and was used primarily as a "listen and learn" exercise to understand the region, its positioning, current barriers to growth and potential opportunities.
- **Stage 2:** Involved a variety of online workshops with the Buchan District TOR Working Group.
- **Stage 3:** Involved in-region visits with the community, industry, and the Buchan District TOR Working Group and involved the discussion of the key challenges and recommendations that had been identified through consultation and research and analysis. This occurred before the development of the draft TOR
- **Stage 4:** Included the circulation of the draft recommendations and involved online workshops with the Buchan District Working Group to determine priority recommendations.

In addition to these consultation phases, the project team was also in regular liaison with key stakeholders to discuss key findings and options.

Figure 4: In-region site visits

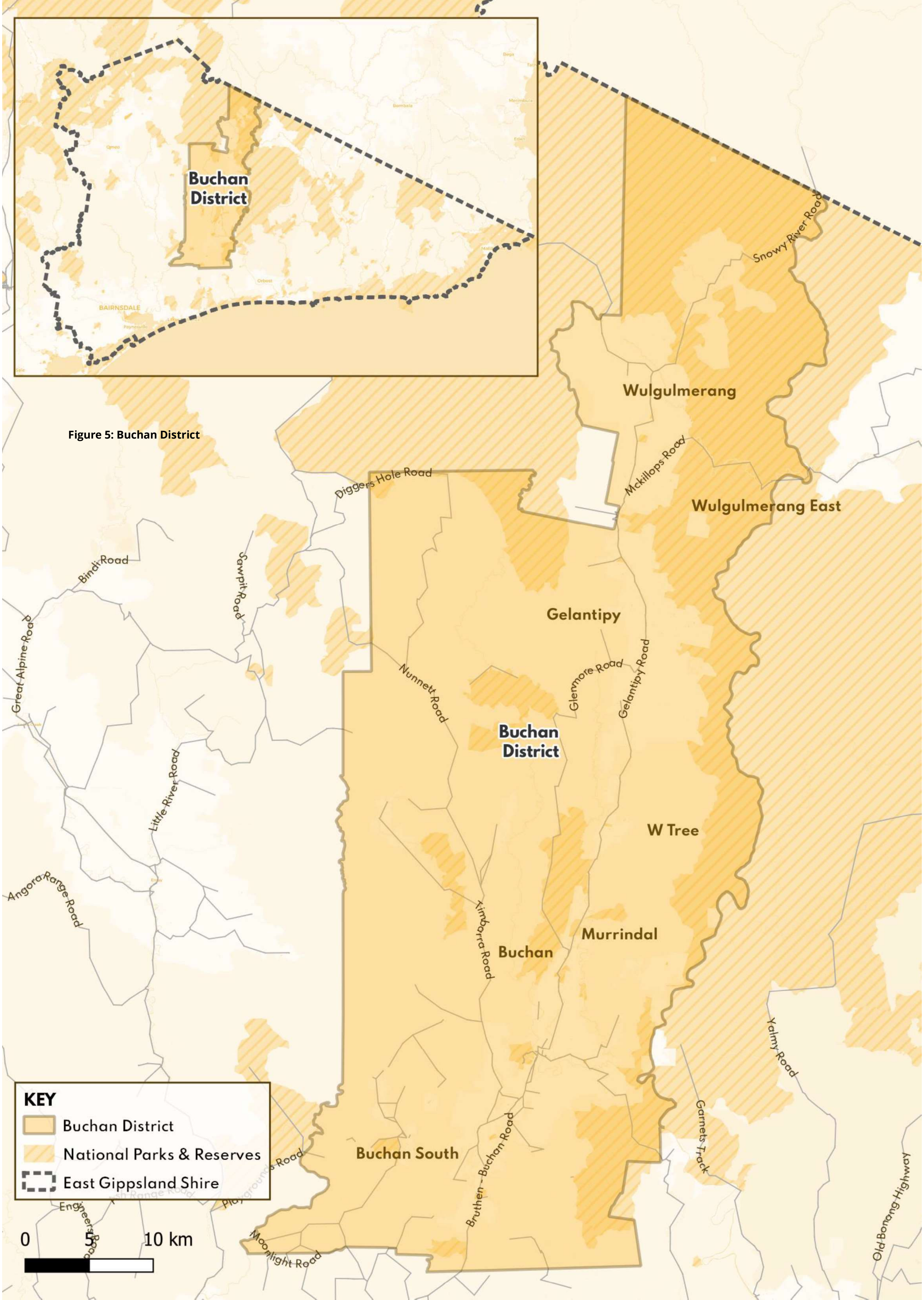


Figure 5: Buchan District

1.3. ABOUT BUCHAN DISTRICT

1.3.1. Introduction

Buchan District (Figure 5) is a rural area that lies in the central northern part of the East Gippsland Shire. The district largely comprises farming land and native vegetation and includes the localities of Black Mountain, Buchan, Buchan South, Buchan East, Butchers Ridge, Canni Creek, Gelantipy, Gillingall, Glenmore, Murrindal, Suggan Buggan, Timbarra, W-Tree, and Wulgulmerang. The primary town and service centre for the district is Buchan. The town is situated approximately 75 kilometres from Bairnsdale and 350 kilometres from Melbourne.

Buchan has one of Gippsland's major tourism icons, the Buchan Caves, along with Buchan Caves Reserve, limestone-rich valleys, picturesque hills, numerous waterfalls, gorges, and historic bridges. It is also home to the Snowy and Buchan Rivers. The town has several smaller-scale tourism operators in the region, including accommodation properties galleries, eateries, the Howitt Bicycle Trail, Buchan Golf Course, tourist drives, self-guided historical walking tours and local town businesses while the surrounding valleys and hills provide opportunities for fishing, bushwalking, bird watching, trail riding, kayaking, white water rafting, four-wheel driving, and horse riding. Most of this product, however, is self-guided.

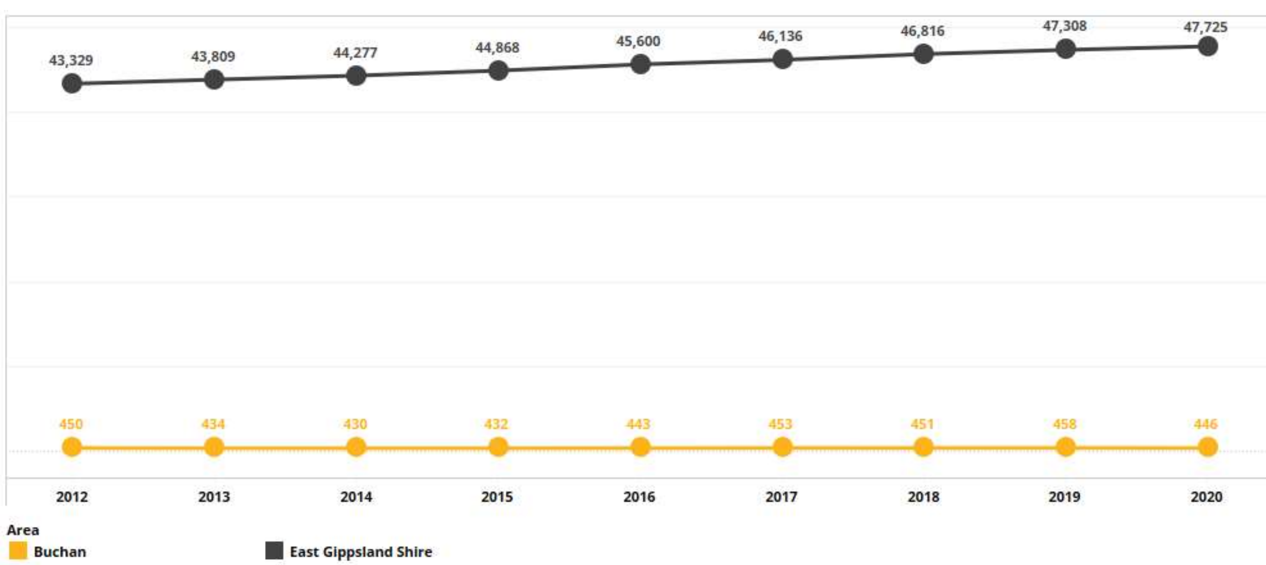
Buchan also has an extensive history, being one of the oldest townships in Victoria, but, more significantly, it has fossils of megafauna that were in the region 20,000 years ago.

1.3.2. Population Profile

Although the district has a relatively small population base (comprising only 9% of the Shire's population base), its population has remained (relatively) static over the past eight years. In 2020, it was estimated that the district had 446 residents. This relatively small population base is important to recognise because tourism attractions and supporting facilities often rely on a resident population who visit frequently and bring their friends and relatives when visiting.

The district's population is ageing (as is the case for many other districts throughout the Shire), with some of these residents residing in more remote parts of the district. Growing the visitor economy provides an opportunity to increase the number of younger people/families in the district through increased employment opportunities, which in turn, grows the local economy and increases the ability to provide additional services/amenities for its ageing population.

Figure 6: Resident Population Estimates[4]



[4] https://profile.id.com.au/east-gippsland/population-estimate?WebID=21058200&BMID=40

1.3.3. Economic Profile

The East Gippsland Shire's economy is largely dominated (in terms of output) by the manufacturing, construction and agricultural, forestry and fishing sectors (Table 3). Together, these sectors comprise 41% of all output. In terms of jobs, the health care & social assistance and retail trade sectors are the TOR two sectors. Tourism makes up 6% of output the Shire's output (making it the sixth-largest sector by output) and generates just over 9% of jobs, making it an important sector for the Shire.

While specific output and employment data are not available at a District level, historically, farming and mining have been larger contributors to the economy. While agriculture has continued to remain an important sector, almost all mining operations have ceased. Farming primarily comprises cattle, sheep, crops, and dairy.

With the district having one of Gippsland's tourism gems (Buchan Caves), the potential exists to grow tourism's contribution to the economy. This should be able to be achieved through converting day trip visitors (particularly those travelling up to the Caves from the coast) to overnight visitors. Overnight visitors are far more valuable to local economies because of their increased spend on accommodation, food and beverage, attractions, retail etc. (by way of example, domestic overnight visitors to the Shire spend seven times more per trip than day-trip visitors[5]). This TOR identifies several recommendations to activate to achieve this conversion.

The importance and opportunity for tourism growth in the district (and broader Shire) is also demonstrated through location quotient (LQ) analysis. This shows that some sectors are more strongly represented in the district than they are in Victoria as a whole. In general, an LQ over 1.5 indicates that there is a degree of specialisation or concentration in that particular industry within an area. Table 4 summarises the LQs for each of the Shire's sectors (in terms of output) compared with Victoria. It demonstrates that the agriculture, forestry and fishing sector and tourism are two important industries for the Shire.

[5] https://www.tra.gov.au/Regional/Local-Government-Area-Profiles/local-government-area-profiles

Table 3: Economic Output & Employment by Sector[6]

Output

Sector	Value	% of Total
Manufacturing	$858m	16.4%
Construction	$665m	12.7%
Agriculture, Forestry & Fishing	$607m	11.6%
Ownership of Dwellings	$439m	8.4%
Health Care & Social Assistance	$341m	6.5%
Tourism	$333m	6.4%
Public Administration & Safety	$208m	4.0%
Retail Trade	$207m	4.0%
Education & Training	$196m	3.7%
Electricity, Gas, Water & Waste Servic..	$187m	3.6%
Transport, Postal & Warehousing	$172m	3.3%
Professional, Scientific & Technical Se..	$166m	3.2%
Financial & Insurance Services	$140m	2.7%
Wholesale Trade	$134m	2.6%
Other Services	$108m	2.1%
Rental, Hiring & Real Estate Services	$101m	1.9%
Accommodation & Food Services	$90m	1.7%
Administrative & Support Services	$84m	1.6%
Information Media & Telecommunicat..	$83m	1.6%
Mining	$71m	1.4%
Arts & Recreation Services	$31m	0.6%
Grand Total	$5,220m	100.0%

Employment

Sector	Value	% of Total
Health Care & Social Assistance	2,635	15.9%
Retail Trade	1,800	10.9%
Agriculture, Forestry & Fishing	1,602	9.7%
Tourism	1,528	9.2%
Education & Training	1,473	8.9%
Construction	1,358	8.2%
Manufacturing	1,236	7.5%
Public Administration & Safety	878	5.3%
Other Services	673	4.1%
Professional, Scientific & Technical Serv..	557	3.4%
Transport, Postal & Warehousing	544	3.3%
Accommodation & Food Services	521	3.2%
Administrative & Support Services	431	2.6%
Wholesale Trade	333	2.0%
Electricity, Gas, Water & Waste Services	229	1.4%
Financial & Insurance Services	191	1.2%
Rental, Hiring & Real Estate Services	189	1.1%
Arts & Recreation Services	170	1.0%
Information Media & Telecommunicati..	129	0.8%
Mining	57	0.3%
Ownership of Dwellings	5	0.0%
Grand Total	16,539	100.0%

Table 4: Location Quotient

Sector	Area	
	East Gippsland Shire	Victoria
Accommodation & Food Services	2%	2%
Administrative & Support Services	2%	2%
Agriculture, Forestry & Fishing	12%	2%
Arts & Recreation Services	1%	1%
Construction	13%	12%
Education & Training	4%	3%
Electricity, Gas, Water & Waste Services	4%	3%
Financial & Insurance Services	3%	8%
Health Care & Social Assistance	7%	5%
Information Media & Telecommunicati..	2%	4%
Manufacturing	16%	20%
Mining	1%	1%
Other Services	2%	2%
Ownership of Dwellings	8%	7%
Professional, Scientific & Technical Serv..	3%	7%
Public Administration & Safety	4%	4%
Rental, Hiring & Real Estate Services	2%	2%
Retail Trade	4%	3%
Tourism	6%	3%
Transport, Postal & Warehousing	3%	5%
Wholesale Trade	3%	4%

Sector	Area
	East Gippsland Shire
Accommodation & Food Services	1.01
Administrative & Support Services	0.72
Agriculture, Forestry & Fishing	5.39
Arts & Recreation Services	0.58
Construction	1.07
Education & Training	1.13
Electricity, Gas, Water & Waste Services	1.05
Financial & Insurance Services	0.33
Health Care & Social Assistance	1.38
Information Media & Telecommunicati..	0.42
Manufacturing	0.82
Mining	1.06
Other Services	1.29
Ownership of Dwellings	1.27
Professional, Scientific & Technical Serv..	0.45
Public Administration & Safety	0.99
Rental, Hiring & Real Estate Services	0.82
Retail Trade	1.29
Tourism	1.96
Transport, Postal & Warehousing	0.73
Wholesale Trade	0.70

[6] https://app.remplan.com.au/eastgippsland/economy/tourism/employment

1.3.4. Visitor Profile

Understanding the size of the district's visitor economy is important when planning for destination management and undertaking tourism opportunity assessments. This includes understanding:

- the size of the visitor market, in terms of how many visitors are travelling to the district (and the broader region), and how this has changed over time;
- where visitors are coming from, including from domestic and international origins;
- the split between day trippers and overnight visitors;
- total spend by visitors; and
- visitation to surrounding regions, for two reasons: to look at potential visitation leakage (particularly for overnight visitation), and to see where the best leverage opportunities exist.

1.3.4.1. How data was derived

Visitor data has been compiled for the district using the National and International Visitor Survey (NVS and IVS) data published by Tourism Research Australia (TRA). The NVS and IVS provide visitation data based on 'Statistical Area 2' (SA2) boundaries. Every LGA in Australia is made up of one or more SA2s. The SA2s included in East Gippsland Shire are outlined in Figure 7.

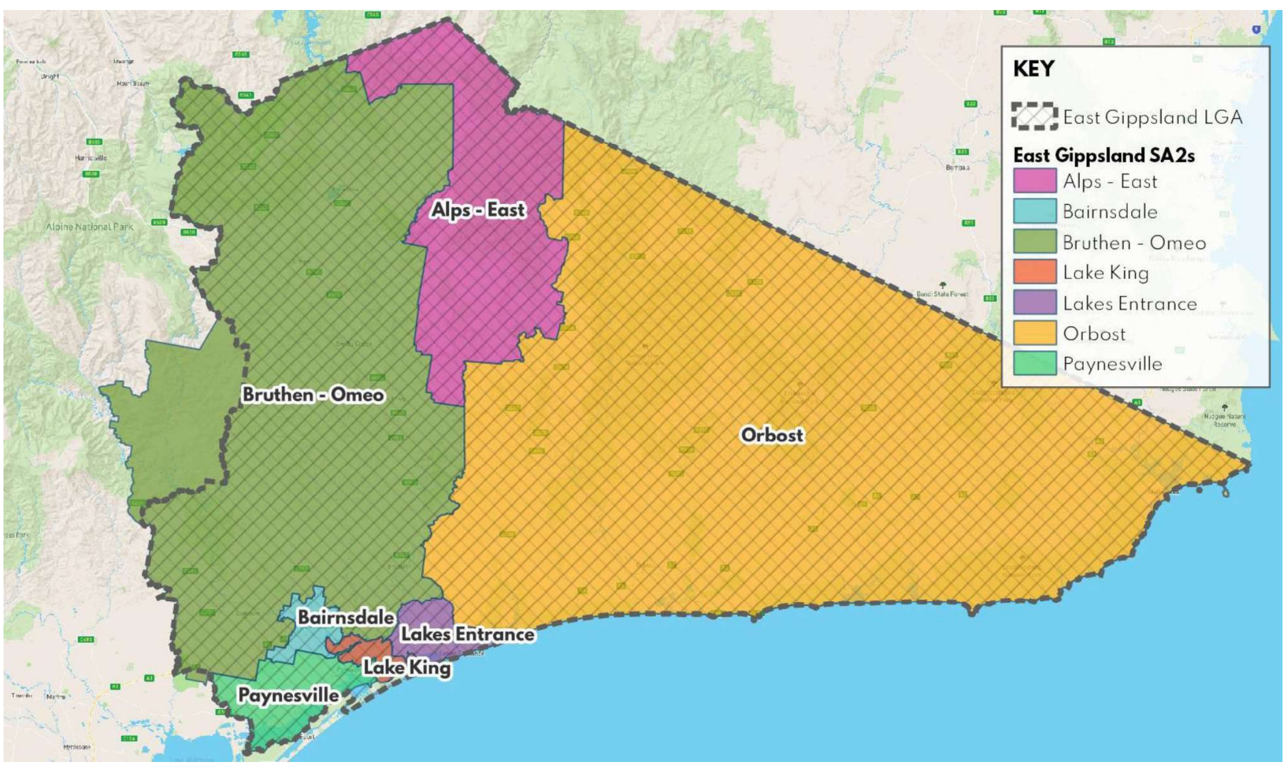
As per the methodology applied by TRA for LGAs[7], visitation data is averaged over three-year periods, rather than being provided on an annual basis, as this minimises the impact of variability in estimates from year to year and provides more robust estimates. The periods assessed in this report include:

- March 2010 to March 2012, referred to as **2012**;
- March 2013 to March 2015, referred to as **2015**;
- March 2016 to March 2018, referred to as **2018**; and
- March 2019 to March 2021, referred to as **2021**.

March YE data (unless otherwise specified) has been applied as this is the most recent iteration of data released by TRA via the NVS and IVS at the time of report writing.

A visitor profile for each SA2 in the East Gippsland LGA has been included in Appendix 1.

Figure 7: SA2s in East Gippsland Shire



[7] https://www.tra.gov.au/research/regional-tourism/local-government-area-profiles/local-government-area-profiles

Buchan District falls in the Orbost SA2, along with four other Districts – see Figure 8. TRA does not provide data at any smaller geographical level than an SA2 level. To provide a further breakdown, the findings of a visitor survey commissioned by Deloitte in 2021 (see Appendix 2) have been applied. This survey asked visitors which Districts in the entire East Gippsland Shire they visited for the day and those that they stayed overnight. This enables an estimate to be provided of visitation to Cann Valley District as well as those staying in other parts of the Orbost SA2 for comparative purposes. This is important because visitors do not recognise District or Local Government boundaries. They are drawn to destinations.

1.3.4.2. Total Visits to Orbost SA2 Districts

Figure 9 provides a breakdown of visitation of the five districts that fall in the Orbost SA2, including the Buchan District. Mallacoota District receives the largest share of visitors – with 47% of visitors to the Orbost SA2 estimated to visit Mallacoota District. This is followed by Buchan District (35%) and Orbost District (10%). Buchan receives a large number of the SA2's visitors because of the Buchan Caves attraction.

Figure 8: Districts in the Orbost SA2

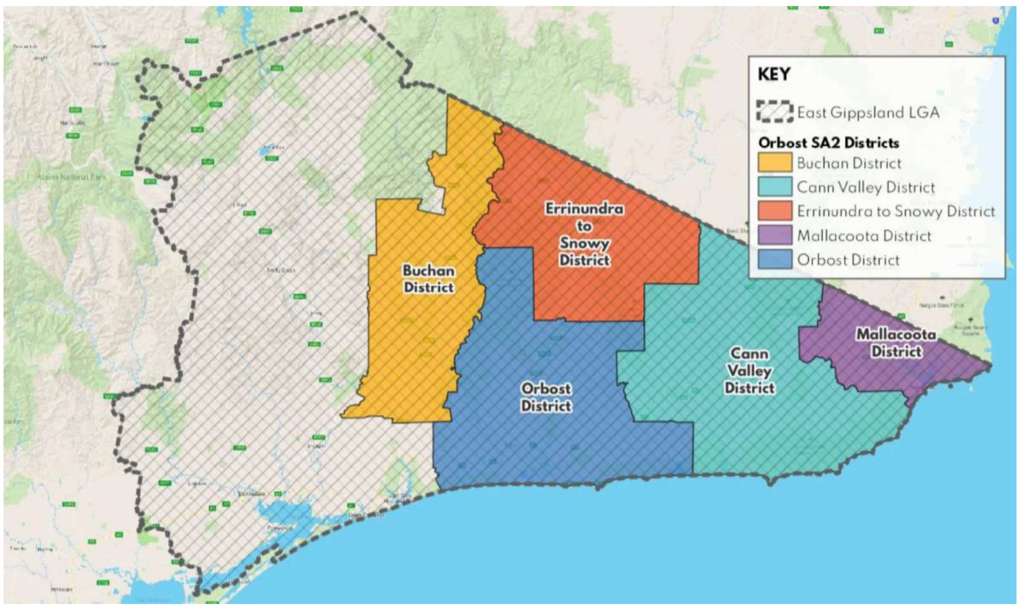
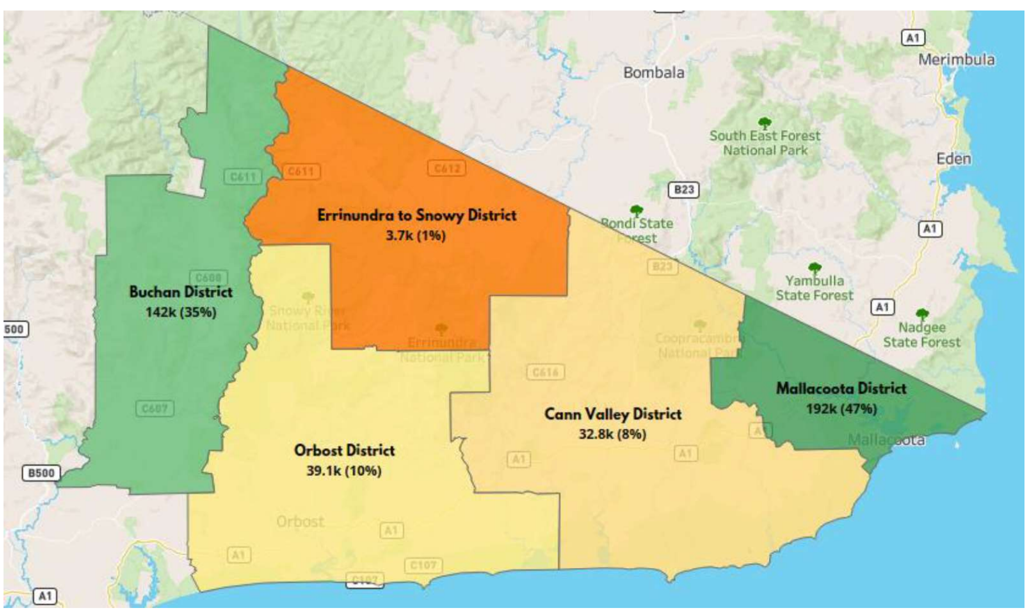


Figure 9: Visits to Orbost SA2 Districts (2021)[8]



[8] TRA and Deloitte Regional Analysis, compiled by Stafford. Because drilling down to an SA2 involves small sample sizes, data needs to be interpreted with care.

1.3.4.2.1. Visitation by Type

Figure 10 summarises visitation to the districts in Orbost SA2 by visitor type. While Mallacoota District has a far stronger proportion of domestic overnight visitation (comprising 86% of total visitation to the district), the remaining districts have a much larger share of domestic day trip visitation. Buchan District (the focus of this TOR) has a large day trip market, comprising 68% of total visitation in 2021.

While the day trip market forms an important part of the visitor economy, it does tend to be a lower-yielding market: overnight visitors spend far more because of spending on accommodation, food and beverage, transport, and attractions. Feedback indicates that there are various reasons why the day trip market dominates in Buchan District, including (but not limited to) a lack of accommodation (so visitors travel in for a day trip only and stay in other areas resulting in economic leakage) as well as a lack of things to do (meaning visitor dwell time in the district is reduced).

There is a desire by the Buchan District community to grow the economic benefit generated through the visitor economy by increasing dwell time and average visitor spend. This TOR focuses on strategies to achieve this.

1.3.4.2.2. Visitation by motivation

Visitation to each district in the Orbost SA2 is largely dominated by those travelling on a holiday, followed by visiting friends and relatives (VFR), business and others[9] (see Figure 11). For Buchan District, leisure-based travel (holiday and VFR) comprises 81% of total travel to the district.

Figure 10: Visits to Orbost SA2 Districts by Visitor Type (2021)[10]

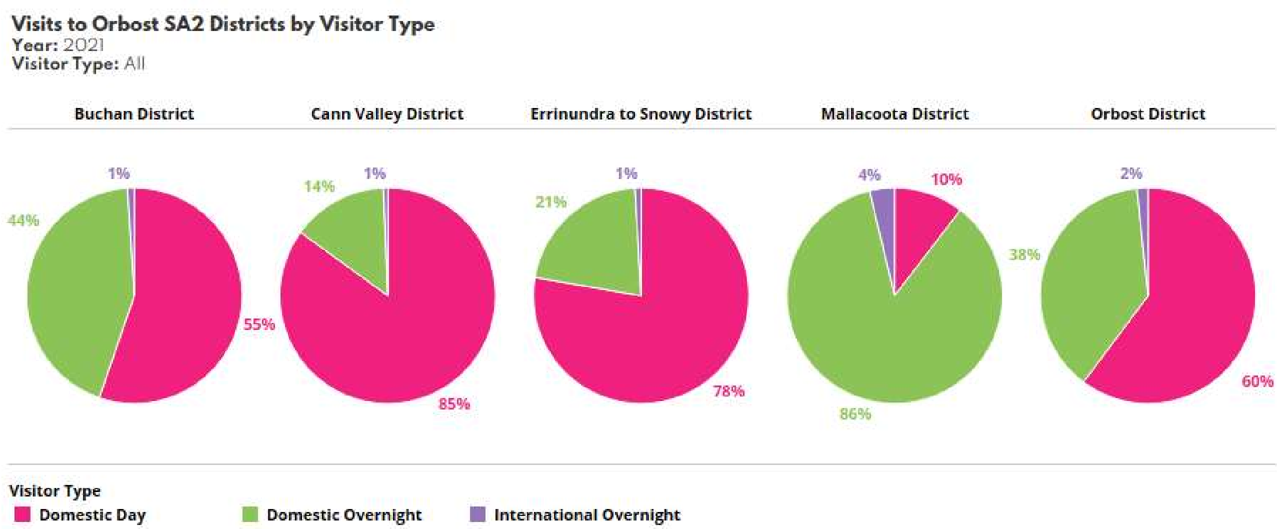
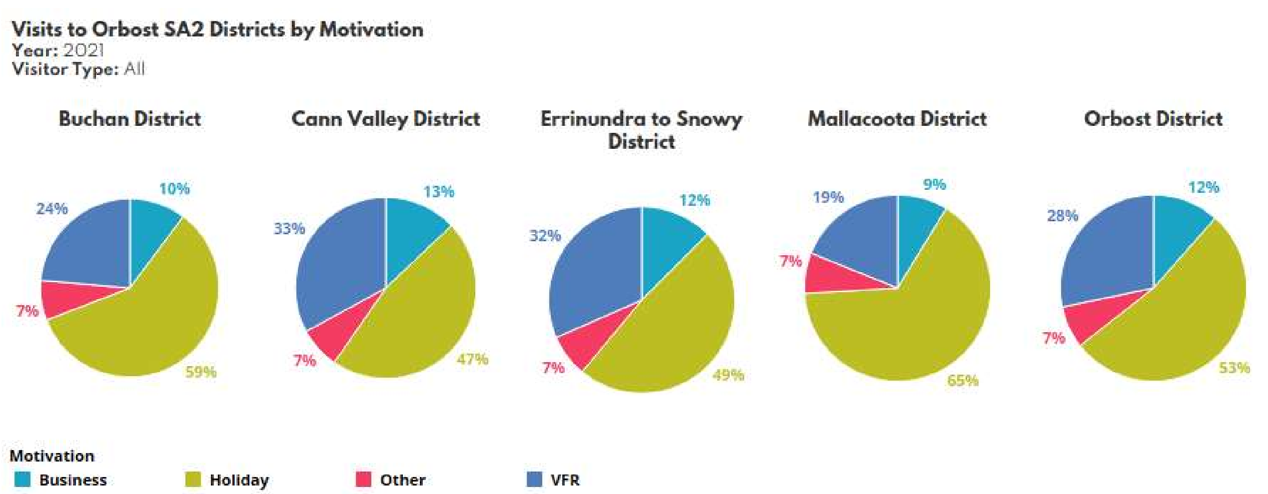


Figure 11: Visits to Orbost SA2 Districts by Visitor Type (2021)[11]



[9] Other includes employment, education, medical reasons etc.

[10] TRA and Deloitte Regional Analysis, compiled by Stafford

[11] TRA and Deloitte Regional Analysis, compiled by Stafford

1.3.4.3. Visitation to Buchan District

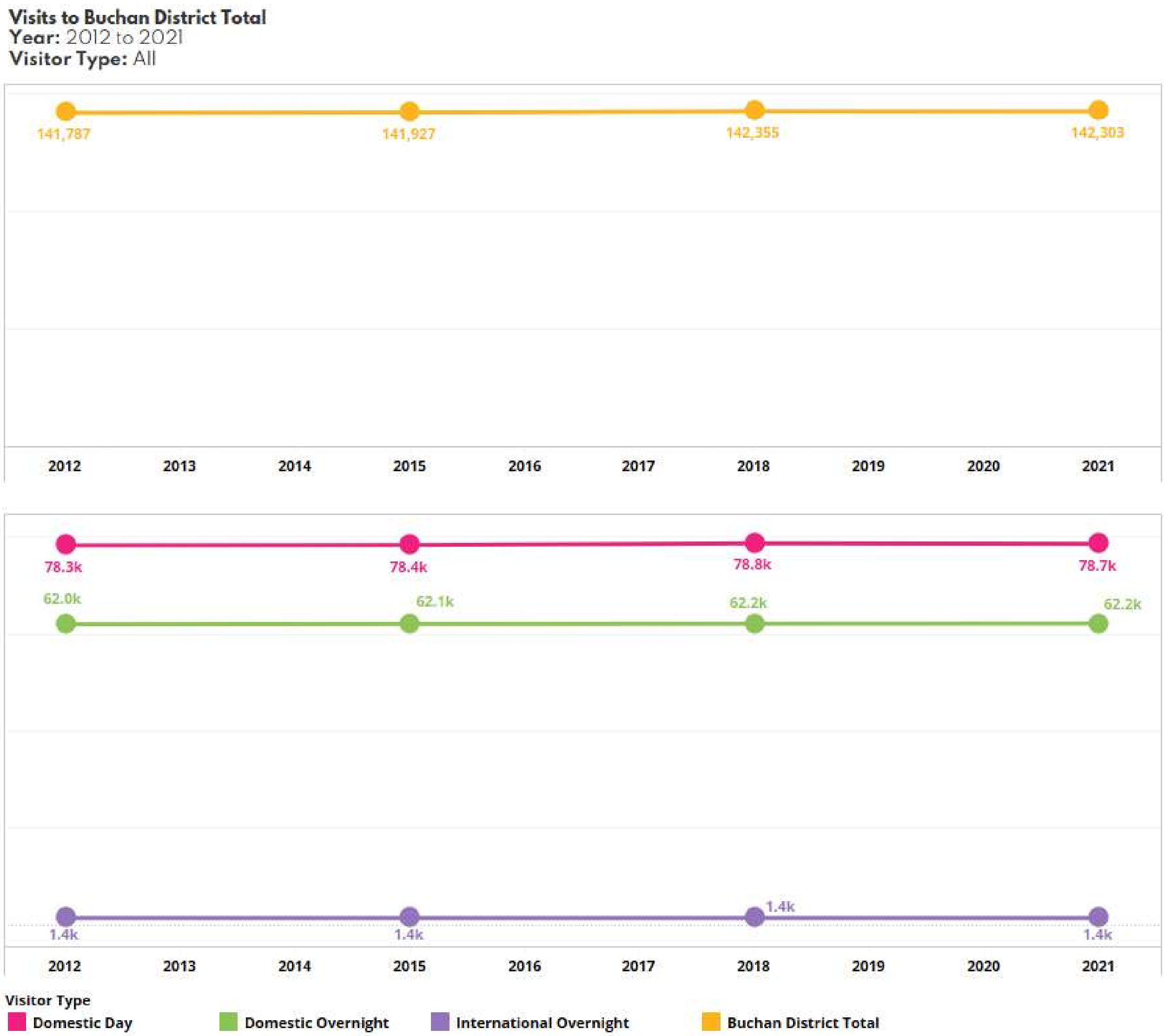
Figure 12 demonstrates the change in visitation to Buchan District between 2012 and 2021. It demonstrates that visitation has generally been on an upward trajectory, increasing from just under 14k visits in 2012 to 17.9k in 2021. The slight drop in visitation (-2%) between 2018 and 2021 is attributed primarily to COVID-19 impacts in 2020 and 2021 which had impacts on tourism nationally.

The majority of growth in visitation to Buchan District has been driven by the domestic day trip market, increasing from 9.5k visits in 2012 to 12.9k by 2018 and consolidating to 12.1k in 2021.

Domestic overnight visitation to the district has continued to steadily grow, increasing by 32% over the period assessed.

International overnight visitation represents a very small share of visitation to the district and has fluctuated over the period assessed.

Figure 12: Visits to Buchan District (2012 - 2021)[12]



[12] TRA and Deloitte Regional Analysis, compiled by Stafford

1.4. SWOT ANALYSIS

Table 5 provides the SWOT analysis for the district as a visitor destination. It is based on the consultation and research that has been undertaken as part of this TOR. It is based on the consultation and research that has been undertaken for this TOR and has informed the identification of barriers and recommendations for the district.

Table 5: SWOT Analysis – Buchan District's Visitor Economy

STRENGTHS	WEAKNESSES
▪ Buchan Caves is the "Jewel in the Crown" – it is well known and already attracts many visitors on their own ▪ Timber industry ▪ Gateway to the Snowy River ▪ Natural environment/ assets ▪ Local talent - creative ▪ Early history and heritage ▪ Friendly attitude ▪ Location as a point between Melbourne/Sydney/Canberra ▪ Black Marble: promotion opportunity ▪ Old mine-Buchan South ▪ Perceived as a safe and secure destination ▪ Limestone quarry ▪ Strength of its people ▪ Rich in living history ▪ Landscape & views ▪ Fossils & history ▪ Buddhist retreat ▪ Rivers ▪ Local produce from agricultural businesses (paddock to plate) ▪ Four-wheel driving & car touring ▪ Employment generated through the tourism sector has grown for the Shire and is a strong contributor to jobs (comprising 8.1% of all jobs)[13]	▪ Management of caves ▪ Leakage of money out of town – timber industry ▪ Lack of sporting facilities/entertainment ▪ Lack of identity - crisis ▪ Mobile phone reception ▪ State of roads ▪ Not enough self-promotion ▪ Signage ▪ Food availability after hours ▪ Lack of water - Snowy River ▪ Losing visitors from Caves Reserve ▪ Lack of information ▪ No public transport ▪ No 'Gourmet' food ▪ No 'destination' accommodation ▪ Diversity isn't embraced within community/divided community ▪ Closure of Buchan pool - in the caves area. ▪ Everything relies on nature-based offers (other than caves) ▪ Limited product range ▪ Limited new and/or refreshed products ▪ Finding staff to fill positions ▪ Lack of staff/worker accommodation ▪ No major destination events ▪ Digital savviness of operators & willingness to get online ▪ Declining/stagnant and aging population
OPPORTUNITIES	**THREATS**
▪ Stocking streams-fish ▪ Backpacker network-marketing opportunity ▪ Heritage/historical assets ▪ Education programs for locals-tourist opportunity ▪ Value adding-timber ▪ Value adding-limestone ▪ Tours of working timber mills ▪ Limestone sculptures ▪ Horse and dray (Ray) ▪ Gateway to Snowy River ▪ Farm education tours ▪ Establish an information centre ▪ Education/geology ▪ Fun education programs ▪ Craft and woodwork ▪ Megafauna/dinosaur festival (see Lancefield events). ▪ Aboriginal cultural discovery trail ▪ Investment in visitor experiences (to do after the Caves) – this includes 'destination' accommodation, meals including local produce, inside activities such as an interactive museum ▪ Become the inland destination to match the coastal Lakes Entrance ▪ Tree TOR walk & other infrastructure to give focus to the forest/gorge experience ▪ A self-drive tour highlighting the extraordinary features of the Buchan area – with decent interpretive signage of geology, gorges, forests, rocks, areas that survived fires etc. ▪ Tourism signage strategy (interpretive and directional)	▪ Lack of water ▪ Parks and caves management ▪ Lack of planning for-tourism ▪ Local apathy ▪ Litter ▪ Bushfire/access ▪ Lack of connectivity with mobile reception ▪ Climate change impacts ▪ Lack of community energy, investment capital ▪ Tourism numbers (especially domestic) have been impacted by COVID-19 as a result of border closures in particular ▪ Constraints accessing land for development because of perceived environmental challenges. ▪ Constraints accessing waterways for product development because of perceived environmental challenges ▪ An ongoing lack of sector cohesion and coordination could stymie the ability of a new TOR to be successful ▪ Limited workforce capacity ongoing will impact the tourism sector's ability to move out of hibernation and reskill ▪ Need to be careful about managing expectations with limited resources for tourism especially

[13] https://economy.id.com.au/wegs/tourism-value?WebID=110

1.5. VISITOR ECONOMY TRENDS

The tourism sector globally has transformed significantly over the past ten years. This transformation has, in part, been driven by technology development, major health and financial events as well as changing consumer preferences (in both the way they book and travel).

Figure 13 summarises some global and national trends impacting the tourism sector, followed by a more detailed description of each and their implications for the district.

Figure 13: Tourism Trends

1.5.1. Recovering from the COVID-19 pandemic

COVID-19 has disrupted tourism globally. In the short term, the opportunity exists to leverage Australia's domestic visitor market by encouraging them to explore their own country and engage in local experiences. This potentially could be converted into a longer-term opportunity because by building greater awareness of Australia's unique offerings, this could change how Australians travel domestically over the longer term.

When international borders re-open and travel is far easier, Australia's core markets could be rebuilt (NZ, China, Southeast Asia, USA, the UK, and Europe) while also exploring opportunities to diversify into emerging markets, such as in Asia (India, for example), where growing wealth is anticipated to drive demand for international travel. Our natural assets and unique culture provide the opportunity to offer unique experiences that these markets are likely keen to undertake.

Diversification opportunities not only exist in visitor markets but also through the diversifying into new products and experiences, for example in luxury travel and encouraging higher-yielding travel. This could potentially be driven by uncertainties regarding inbound international aviation capacity which will both challenge Australia's visitor economy and encourage a focus on high-yield travellers.

Implication for the district: The shift by many destinations to focus far more on the domestic market means that competition amongst Australian destinations has significantly increased. The district needs to ensure it is offering new and enhanced unique visitor experiences.

1.5.2. The digitalisation of visitor information & tourism marketing

Tourism operators and providers need to be prepared to meet the needs of the smartphone generation, with online booking capabilities, mobile-friendly websites, and social media-driven marketing. Having a strong destination brand presence is crucial. Operators need to be online and bookable.

For public and commercial operators, digitalisation provides opportunities to use more detailed data on human behaviour, particularly throughout the booking cycle.

However, a careful balance of online information and marketing is required. There is often too much consumer choice and the proliferation of online information at times makes decisions difficult for consumers. The planning process needs to be made simpler. Package deals have strong appeal (especially to a time-poor consumer) and are motivating as they create a call to action and offer a sense of urgency to book.

Another aspect of technology that has disrupted the visitor economy is the global explosion of the sharing economy. These business models, and others yet unimagined, are anticipated to continue to grow and innovate as they gain increasing levels of acceptance. Real-time access, artificial intelligence, augmented reality, and data personalisation strategies are becoming necessities and will require continuous development to enhance the visitor experience.

Implication for the district: While a small proportion of operators are digital-ready and have a strong online presence, a large number still rely on traditional methods of advertising and booking. Operators need to be proactive in ensuring that all tourism operators are present in the digital space with a solid social media presence.

From a domestic tourism perspective, while Australians are prolific users of technology, there is also a desire, at times, to take a step back from technology. There is a yearning to reconnect through disconnecting; going back to basics and taking a holiday from the online world.

Strong interpersonal visitor services and bespoke product is therefore seen as important to help Australians re-engage with nature, history, and the essence at times of what makes the district and broader region special and appealing.

1.5.3. Climate change

Climate change is a serious, global threat, and actively preventing it needs to be a part of a sustainable tourism strategy. The warming of different parts of the world and extreme weather phenomena, as well as the related social consequences, may increase tourism to parts of Australia where the weather conditions are still relatively cool, but it may also result in many of the nation's key tourism attractions changing, particularly those based on natural experiences.

There is also a shift towards short-haul travel as society is increasingly aware of the carbon footprint long-haul travel generates.

Implication for the district: For many international markets, Australia is considered a long-haul destination. Ways of offsetting their carbon footprint while travelling to and within the district need to be considered.

1.5.4. Changing traveller expectations

Visitor expectations have changed rapidly. Visitor economies must be proactive and adapt to address the changing needs of different traveller cohorts. While younger visitors are seeking authentic and sustainable experiences (and want their interactions digitally enabled throughout the journey) there are an increasing number of older travellers, multi-generational families, and people with disabilities travelling requiring a focus by destinations on accessible infrastructure, quality experiences, and a safe environment. Australia's quality infrastructure and reputation for safe and secure travel positions us well to adapt to and attract these growing markets.

Australia's TOR five largest international source markets (in order of demand) in 2019 included New Zealand, China, the USA, the UK, and Japan. These international markets were looking for security & safety, world-class natural beauty and wildlife, value for money, friendly locals, family-friendly destinations, a clean city and good food, local cuisine and produce.

Once international borders are opened and international leisure travel resumes, these markets will also be looking for safe and hygienic destinations and new interesting experiences.

Implication for the district: The district needs to be positioning itself as a destination that has embraced COVID-19 safety precautions and offers a safe and hygienic destination for travellers with various enhancements to existing products along with new products.

1.5.5. Engaging the community

Before COVID-19, many destinations globally were suffering from over-tourism, where communities were turning against the visitor economy due to perceived and real impacts on the environment, their quality of life etc. There is a need for operators to adopt more sustainable practices and engage with the community by acknowledging their needs and educating them about the benefits delivered by the visitor economy. A fully engaged and supportive community will be more welcoming and will appreciate the amenity brought by the visitor economy, thereby adding to a destination's reputation for a positive visitor experience.

Implication for the district: There is a need to ensure the community understand the benefits of growing the district's visitor economy. This includes the number of jobs generated and supported, along with how tourism helps support greater community amenity (including longer retail and F&B trading hours etc.)

1.5.6. The time-poor traveller

Travellers are increasingly time poor. In long-haul travel markets, such as the USA and Europe, Australia is seen as a destination that requires a large commitment of both time and money. There is much greater pressure on first-time visitors to see as much as possible or to see the key 'icons'.

Implication for the district: In many instances, long-haul travellers believe Australia is the 'trip of a lifetime' and see it as a single visit destination. However, constrained itineraries often mean these visitors "tick off" the bucket list items which are often promoted in Australian destination marketing (such as Uluru, the Three Sisters, the Sydney Opera House, The Great Ocean Road, and The Great Barrier Reef). Destinations such as East Gippsland, therefore, are likely to be missed by most of these visitors.

From a domestic tourism perspective, Australians are increasingly time poor. Holiday time is precious, and reconnection remains central to travel. Taking time out to be with family and friends allows one to connect, recharge, escape and enjoy the small things in life.

1.5.7. Diversity of cultures

Visitors are increasingly international. Through globalisation and international mobility, both multiculturalism and the importance of the diversity related to it, have increased rapidly in the last few years.

There is an increased expectation with regards to authenticity and engagement. The quest for a deeper connection to a place and its people continues to be a strengthening travel goal. More visitors are looking for ways to have a local and connected experience.

A growing tourism segment and often a way to experience a destination's culture is via food-based experiences that can showcase local products and cultural cuisine. However, they need to be authentic experiences. The food tourism sector is highly competitive in a domestic marketplace that is now crowded with food festivals, art festivals and major sporting events etc.

Implication for the district: The district has very limited international-ready tourism products and limited paid tourism products. There needs to be a greater focus on fostering the development of these types of experiences as well as those that enable visitors to truly experience and interact with different cultures.

1.5.8. The economic centre of gravity is shifting eastward

Economic growth has been very strong in various parts of Asia, and it is predicted to keep growing. As these economies continue to advance, and as recovery from COVID-19 progresses, there will be a growing number of travellers from these countries. Their expectations and desires differ market-to-market and there is a growing shift from packaged travel to free independent travel as these markets mature.

Implication for the district: Once international leisure-based travel resumes to Australia, the district needs to ensure that promotion and product offerings align with the market expectations of travellers from these growing economies. Delivering to meet specific market needs is going to be important. However, the primary focus for the district should be on the domestic visitor market which represents most visitation.

1.5.9. A growing desire for responsible tourism

Today, ethical, and environmental issues are considered increasingly important. Destinations that value and emphasise responsibility are seen as both attractive and acceptable.

Implication for the district: The remote and natural environment offered throughout the district means that visitors who travel to the district are often those who are keen to experience nature and, therefore, often have an increased awareness of their footprint and ecological impact.

1.5.10. Rebuilding the visitor economy workforce

A major impact of COVID-19, particularly on the tourism sector, was that a large number of experienced staff exited the visitor economy which has resulted in lost expertise. Many businesses are facing workforce shortages that have been exacerbated by the continuing short-term absence of permanent and temporary migrant workers who have traditionally been an important supplementation to the visitor economy workforce. Better employment engagement strategies with people who may be underutilised in this workforce, including people living with disabilities, women returning to the workforce after children, older Australians, and Aboriginal and Torres Strait Islander peoples should be explored.

At a Federal level, this could require reforming visa settings to expand the pool of people able to be recruited from overseas.

The opportunity exists over the longer term, however, to enhance the reputation of the visitor economy as a career of choice to encourage more Australians to choose it as their career path. This will include industry ensuring that employers are offering good conditions and career opportunities.

Implication for the district: Even before COVID-19, the district struggled to attract and retain tourism and hospitality staff. Several factors have influenced this including the fact that the sector is not always seen as offering sufficient career pathways. A broader regional tourism and hospitality retention strategy may be required to address labour force shortages.

1.5.11. Expectations of improved customer service standards

Customer service remains an issue for most destinations yet can be the point of difference that visitors often have positive lasting memories of. This is often a challenge for the tourism industry, which tends to have a higher staff turnover, and which often attracts those who are seeking more transitory employment. Competitive destinations are strategically building their competitive offer around a well-skilled and trained workforce delivering exemplary service standards.

Implication for the district: There is a need for the district to constantly upgrade its customer service standards to meet and exceed visitor expectations. This will be particularly important in a post-COVID-19 market where the tourism sector has seen major changes in employment levels and is finding it far harder to secure sufficient staff.

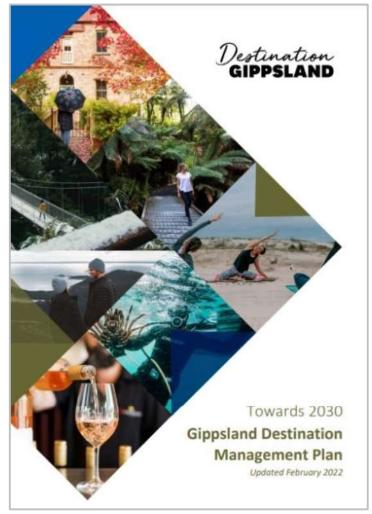
1.5.12. A stronger domestic tourism focus

COVID-19 has turned tourism on its head in Australia. Throughout the country, destinations are grappling with the complete loss of international visitation and spending. To counter this decline, operators and destinations are increasingly focusing on the domestic visitor market. While there are some common threads between domestic and international visitor expectations, there are also significant differences. Understanding domestic tourism trends are important as it can help ensure that the district is proactively researching what visitors are demanding. Product development and marketing activity need to be carefully aligned with this.

Implication for the district: The domestic visitor market comprises the vast majority of visitors to the district. This market offers the low-hanging fruit opportunity and should continue to be focused on. It is important that product development aligns with domestic visitor market desires as competition for domestic visitors will continue to grow.

1.6. LINKING TO THE GIPPSLAND DMP

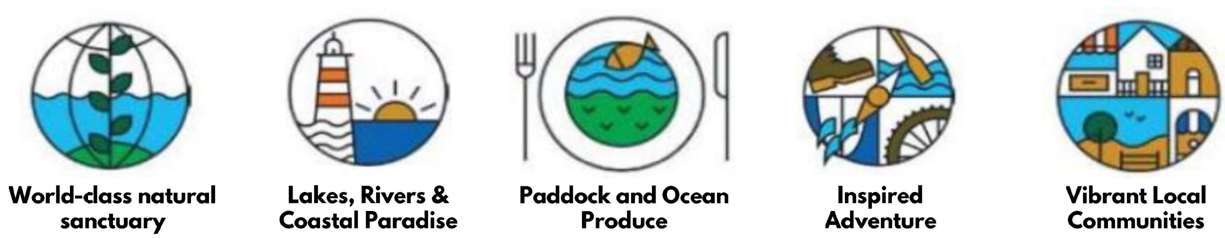
Although this TOR has been developed from a "bottom-up" approach (that is, being driven by the local community it represents), care has been given to ensure it also aligns with the broader Gippsland Destination Management Plan (DMP).[14] The DMP outlines six guiding principles (indicated below) and the opportunities identified in this TOR aim to deliver on some or all of these guiding principles.



- **Inclusive:** Encouraging businesses and attractions to be more accessible, inclusive, and appealing, to offer the same opportunities to all.
- **Sustainable:** Building our visitor economy by thinking and acting in ways to better ourselves, our communities, and our worlds. Ensuring long-term sustainable management of natural and cultural assets incorporating sustainable tourism principles.
- **Resilient:** Ensuring plans are in place to adapt and respond to the risks and opportunities associated with climate, crisis and changing markets.
- **Compelling:** To grow the visitor economy market share, spend and yield in Gippsland.
- **Excellence:** Strengthen assets by lifting product price and quality and aim for excellence in servicing standards to remain competitive.
- **Engage:** Connect with and inspire the community to build understanding about the importance of tourism to the economy. Work collaboratively as a region, across jurisdictions to grow tourism.

The DMP also outlines several experience pillars, each of which has direct relevance to the opportunities identified in this TOR. These include the following and tie into the Strategic Framework themes identified in Section 2.1.

Figure 14: Gippsland DMP Experience Pillars



[14] https://assets.visitgippsland.com.au/documents/Towards-2030-Gippsland-Destination-Management-Plan-Updated-February-2022-FINAL.pdf

1.7. OUR PRODUCT OFFERING

1.7.1. Overview

The following section provides a tourism product audit. The purpose of the audit is twofold: firstly, to ascertain where product gaps may exist in the tourism product mix; and secondly, to complete sentiment analysis on the existing product.

Although the audits have narrowed in on Buchan's product offering, a broader, TOR-line assessment has been undertaken on products in the East Gippsland Shire more generally. This is because visitors do not recognise district or local government boundaries and product gaps may exist more broadly that could potentially be filled in the Cann Valley District.

The audit is primarily based on an extensive 'data scraping' exercise that leveraged the following sources: Visit East Gippsland, TripAdvisor, Booking.com, Google Travel and Google Maps.[15]

1.7.2. Accommodation Audit

When reviewing the accommodation audit findings, it is important to note that it excludes:

- non-commercial accommodation, such as Airbnbs and holiday home properties (unless these are listed on commercial platforms such as TripAdvisor, Google Travel or Booking.com);
- unofficial camping areas (such as those listed on peer-to-peer sharing sites such as WikiCamps); and
- where room or site numbers were not available, estimates have been included based on average rooms/sites per property type.

1.7.2.1. Properties

Figure 15 and Figure 16 summarise the findings of the audit undertaken on accommodation properties in the Shire as well as in the three Districts being assessed, including Buchan District. The findings demonstrate the following.

- 323 properties were identified throughout the entire Shire. These are largely clustered around Lakes Entrance. Of these 323 properties, 15 properties were identified for Buchan District.
- The majority of properties across the Shire identified were caravan parks & campgrounds, representing 39% of all properties identified. Approximately half of these comprise largely free[16] camping grounds managed by Parks Victoria. This was followed by holiday homes and apartments, totalling 22% of all properties.
- In Buchan District specifically, most properties identified were also caravan parks and campgrounds, totalling 47% of all those identified, followed by cabins, cottages & chalets (27%). Most campgrounds identified in the district are campgrounds managed by Parks Victoria and most of these are free.
- In terms of bookable units[17], there were 3,516 identified across the Shire. The majority of these (52%), are provided through caravan parks and campsites, and therefore, primarily represent camping sites (rather than physical rooms).
- Although motel, pub accommodation and backpacker accommodation represented only 17% of properties identified, they provide the second largest number of bookable unit stock representing 22% of all bookable units identified for the Shire.
- For Buchan, the most bookable unit stock is provided through caravan parks and campsites (147 units, representing 79% of the stock).
- Most properties in Buchan District are clustered around Buchan town and the caves precinct.
- While Lakes Entrance and surrounds have several hotel and resort-style properties, Buchan District does not have any of these property types. The property typology in Buchan District, however, is the most diverse of the three Districts being assessed in separate TORs.
- More broadly throughout the entire LGA, there are also limited higher-quality, branded properties. These properties need not be large-scale but can be of a more boutique nature. Having a larger proportion of branded properties in an area's accommodation portfolio is advantageous for a number of regions, including:
  - the significant marketing databases they bring which help promote not only their properties but also the regions in which they are located;
  - they strongly support overnight visitation to the LGA;
  - they often are strong supporters of local and regional events and festivals etc.; and
  - they often act as catalysts for other accommodation properties to raise their quality standards.

[15] It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online.
[16] An estimated 70% of Parks Victoria campsites are free.
[17] Note, bookable units do not reflect rooms but rather room units that can be booked by individual parties. For example, a house that has four bedrooms would be listed as 1 bookable unit. While a 40-room motel would be listed as 40 bookable units.

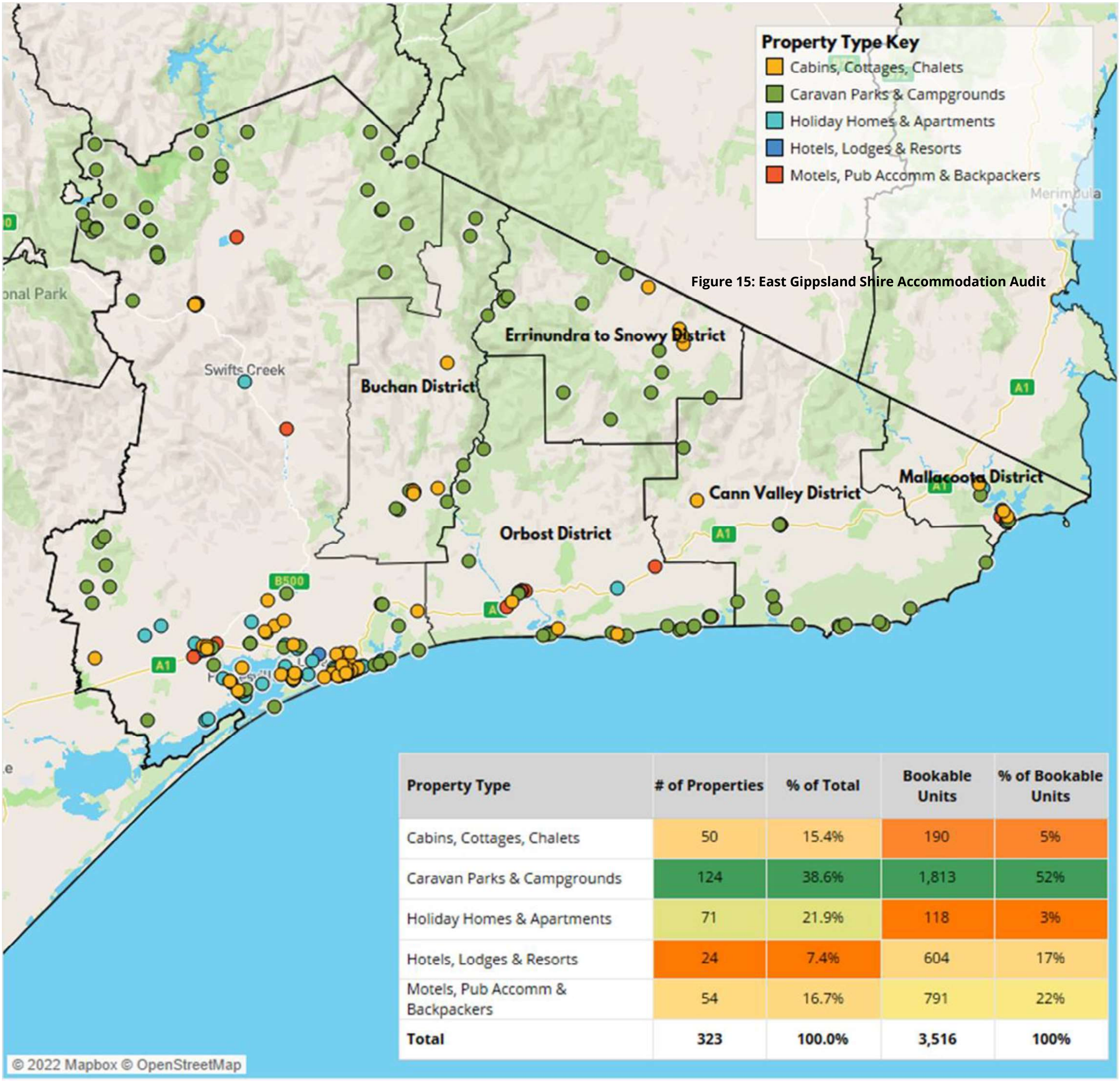
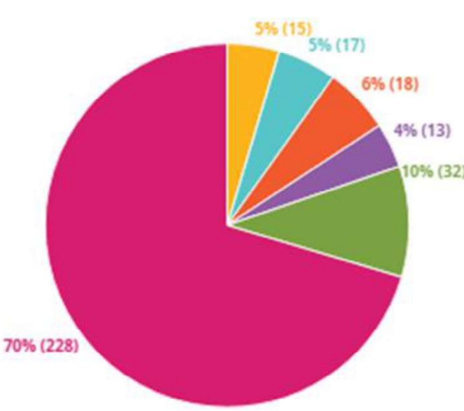


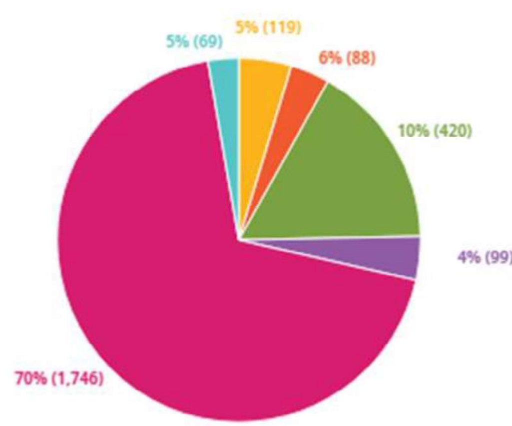
Figure 15: East Gippsland Shire Accommodation Audit

Property Type	# of Properties	% of Total	Bookable Units	% of Bookable Units
Cabins, Cottages, Chalets	50	15.4%	190	5%
Caravan Parks & Campgrounds	124	38.6%	1,813	52%
Holiday Homes & Apartments	71	21.9%	118	3%
Hotels, Lodges & Resorts	24	7.4%	604	17%
Motels, Pub Accomm & Backpackers	54	16.7%	791	22%
Total	**323**	**100.0%**	**3,516**	**100%**

Share of Properties



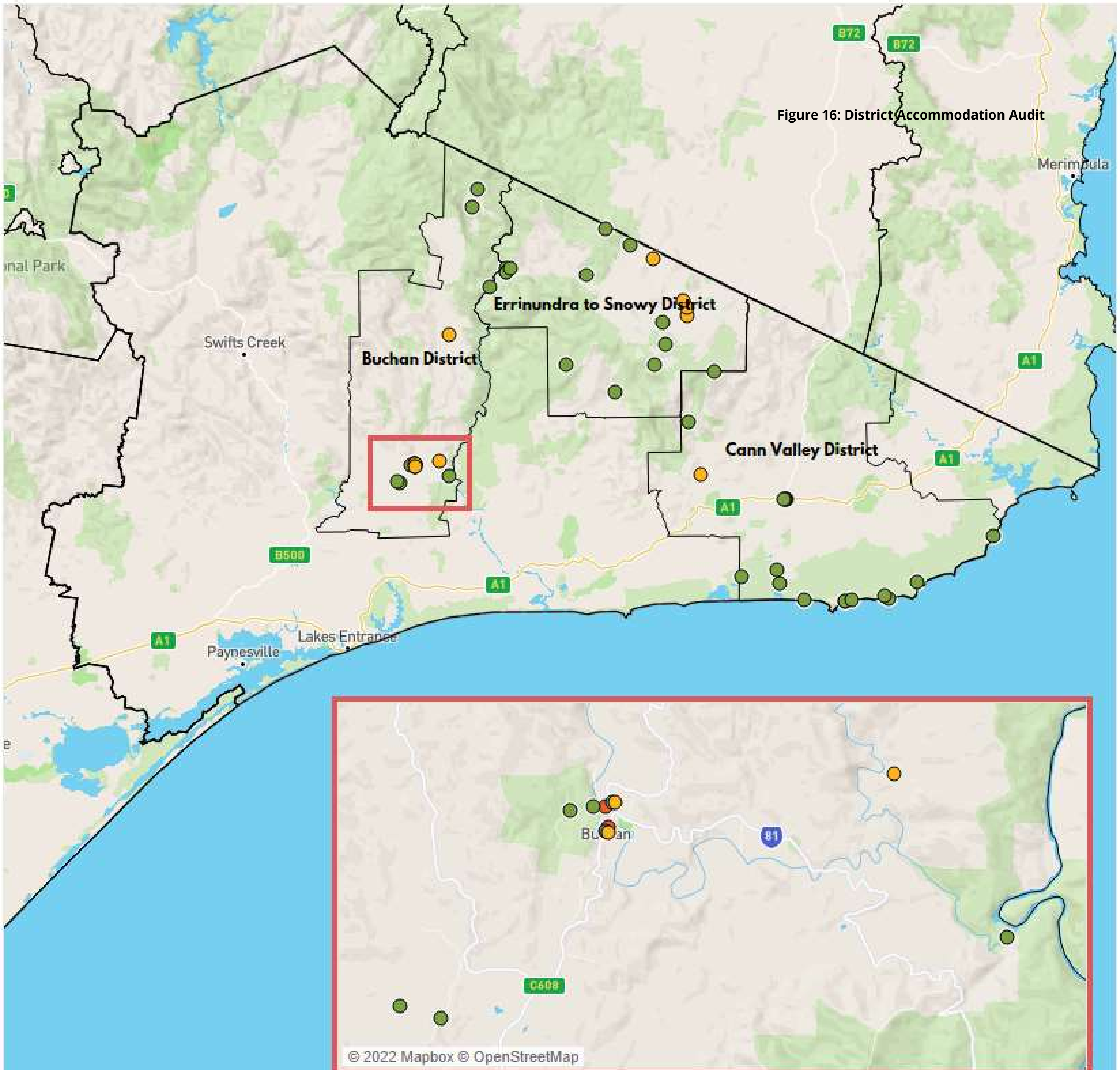
Share of Bookable Units



District Key

- Bucchan District
- Errinundra to Snowy District
- Orbost District
- Mallacoota District
- Other East Gippsland
- Cann Valley District

Figure 16: District Accommodation Audit



District Group	Property Type	# of Properties	% of Properties	Bookable Units	% of Bookable Units alon..
Buchan District	Caravan Parks & Campgrounds	7	47%	147	79%
	Holiday Homes & Apartments	1	7%	1	1%
	Cabins, Cottages, Chalets	4	27%	13	7%
	Hotels, Lodges & Resorts	1	7%	2	1%
	Motels, Pub Accomm & Backp..	2	13%	23	12%
	District Total	**15**	**100%**	**186**	**100%**
Cann Valley District	Caravan Parks & Campgrounds	13	76%	159	76%
	Cabins, Cottages, Chalets	1	6%	1	0%
	Motels, Pub Accomm & Backp..	3	18%	48	23%
	District Total	**17**	**100%**	**208**	**100%**
Errinundra to Snowy District	Caravan Parks & Campgrounds	14	79%	160	90%
	Cabins, Cottages, Chalets	4	21%	18	10%
	District Total	**18**	**100%**	**178**	**100%**
Total		**50**	**100%**	**572**	**100%**

1.7.2.2. Accommodation Sentiment

To undertake a top-line assessment of the quality of an area's commercial accommodation offering, a Net Promoter Score (NPS) metric has been used. This is a measurement of consumer assessment and loyalty. In a tourism accommodation context (for example), this translates to a visitors' willingness to not only return for another stay but also make a recommendation to their family, friends, and colleagues. NPS scores are reported with a number from -100 to +100, with a score above 0 considered okay, a score above 30 considered good and a score above 50 considered excellent.

The NPS is calculated using a scale (see Figure 17), with:

- a score between 0-6 being considered unhappy customers who are unlikely to return, and may even discourage others from staying with the provider;
- a score between 7-8 being passives, meaning they are satisfied with the provider but not happy enough to be considered promoters; and
- a score between 9-10 are considered promoters who are typically loyal and enthusiastic customers and who are likely to return and strongly promote the provider.

TripAdvisor[18] and Google use a scale of 1-5 for consumer ratings on accommodation products. Converting this to the NPS scale means that a rating of 1-3 is considered "detractors" for the product, a score of 4 are the product's "passives" and a score of 5 is the product's "promoters".[19]

Figure 17: NPS Score Scale

Of the 323 properties identified throughout the Shire, NPS ratings were able to be obtained for 201 properties (62%). This is a robust sample size for calculating NPS scores by category. *Only those properties with more than 5 reviews have been included in the assessment to provide a more robust sample size for individual reviews.*

Table 6 provides a summary of the NPS results[20] for the Shire's accommodation mix. Analysis has not been provided on a district level because there are not enough properties that have enough reviews to break it down to this level with a reliable sample size.

The Shire-wide findings are as follows.[21]

- The Shire's accommodation product receives an overall NPS of +45 based on 18,782 reviews. This is an average-to-good NPS rating reflecting existing facilities.
- The category which receives the highest average NPS score is boutique-style properties (cabins, cottages, chalets) with a strong NPS of +64 reflecting a higher degree of consumer satisfaction. This is based on 1,707 reviews across 35 properties.
- Surprisingly, hotels, lodges & resorts, which generally tend to rate higher in NPS assessments[22], achieve the fourth-lowest NPS score of +31 (based on 4,044 reviews across 24 properties). Although this is still a positive score, it is towards the lower end of the scale and indicates that consumers may have price:quality concerns regarding this form of accommodation.

It is important to note, however, that the NPS scores provided are amalgamated average scores: some properties achieve higher NPS' while others achieve very low NPS' resulting in a lower overall average NPS.

Table 6: Accommodation NPS Summary

Property Type	# of Properties	Reviews	Avg. NPS
Cabins, Cottages, Chalets	35	1,707	+64
Holiday Homes & Apartments	28	985	+57
Caravan Parks & Campgrounds	61	5,063	+48
Hotels, Lodges & Resorts	24	4,044	+31
Motels, Pub Accomm & Backpackers	53	6,983	+29
Total	**201**	**18,782**	**+45**

[18] Booking.com has not been used to derive a NPS because it does not provide a scale of scores, but rather, only provides an overall score. Therefore, an NPS is unable to be calculated from Booking.com listings.

[19] https://birdeye.com/blog/net-promoter-score-explained/

[20] It is important to recognise that a high NPS reflects that the quality of product on offer matches the price and consumer expectation. The NPS is calculated based on user-generated ratings on both Google and TripAdvisor for individual businesses. It assesses "promoters" and "detractors" (based on ratings from excellent – poor, or, 1-5) and calculates an NPS.

[21] The data scraping for NPS scores was undertaken in June 2021. The number of reviews therefore is reflective of this period.

[22] Based on assessments undertaken by Stafford

1.7.3. Experiences/Attraction Audit

1.7.3.1. Experience/Attractions

Because the tourism sector is so far-reaching, there are many products, experiences and assets which can be considered tourism based. This audit, has, however, focused on those which are considered primary tourism experiences, that is, those which are marketed and positioned as "things to do" when visitors travel to East Gippsland Shire and the Buchan District. Those products/experiences which are primarily utilised by the local community have, therefore, been excluded.

To be able to derive qualitative and meaningful findings from the product audit, product has had to be listed within product categories. Table 7 summarises the attraction type categories used.

Table 7: Experience/Attraction type categories

- Arts, Heritage & Museums
- Beaches, Rivers & Lakes
- Boat & Fishing Tours & Rental
- Entertainment & Recreation
- F&B Experiences
- Golf
- Guided Tours
- Lookouts, Bridges, Jetties
- Natural Assets
- Parks & Gardens
- Walking & Biking Trails
- Wellness
- Wildlife Viewing & Farms

When reading the product findings, it is important to note:

- events have been excluded from the audit;
- general parks have not been included as there are many of these throughout the Shire that are primarily used by a local market, which would skew the findings; and
- general food and beverage (cafes, restaurants, bars), rather, the audit only focuses on unique food experiences such as distilleries, food tours etc. (if these are available in the Shire).

Figure 18 and Figure 19 illustrate the findings of the attractions and experiences audit for the Shire and the three districts being assessed as part of the TORs respectively. They demonstrate the following.

- Based on the audit findings, there are 318 tourism attractions across the Shire. 32 of these attractions are listed for Buchan District, totalling 10% of the Shire's product.
- Of the Shire's 318 attractions, just over half (52%, or, 164 attractions) are natural assets including national parks and reserves. Virtually all of this product is free product that is managed by Parks Victoria along with Council.
- The next two most common product categories are parks and gardens (representing 7% of the product identified) and beaches, rivers, and lakes (6%). Like the above category, practically all of this is free.
  For Buchan District, the most common product type is also natural assets, comprising 88% of all the product identified for the district.
- Most tourism product in the district is within proximity of the Buchan Caves precinct. The remainder of the product that is dispersed throughout the district primarily comprises national parks and reserves.
- A TOR-line assessment of free versus paid products was undertaken (see Figure 20). This demonstrated that 94% of the Buchan District's tourism product is free, while 6% is paid. This is compared with a Shire-wide ratio of 80% free to 20% paid product. Although having 'free things to do' in an area is an important part of a region's product mix, greater economic benefit tends to be generated through commissionable tourism experiences. This is because of visitor spend on the product, the ability for wholesalers to package product is greater and the ability to reinvest in product is greater.

From the audit, it is clear that there are the following product gaps in the Buchan District and broader East Gippsland Shire.

- Paid tourism experiences generally.
- Non-coastal tourism experiences (paid and free) that are not national park areas.
- All-weather experiences for visitors to undertake during times of inclement weather (too hot or during periods of excessive wet weather).
- Family-friendly experiences for both visitors and locals alike to undertake.
- Health and wellness product.
- Eco-based tourism product including guided, commissionable product which leverages the stunning, free natural assets already available in the district and broader shire.

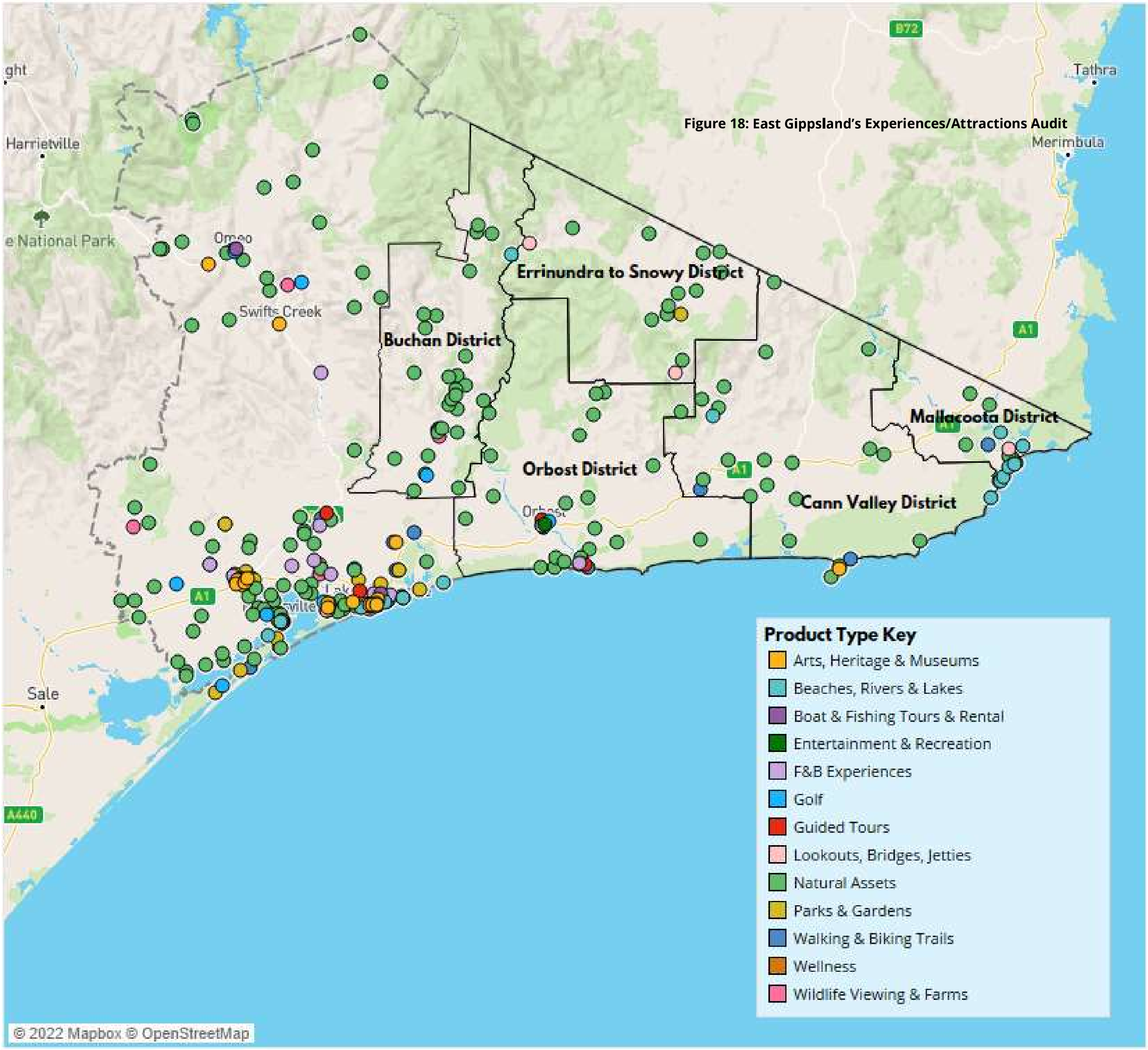


Figure 18: East Gippsland's Experiences/Attractions Audit

Breakdown of Product (Shire-wide)

Product Type	# of Attractions	% Share
Natural Assets	164	51.6%
Parks & Gardens	23	7.2%
Beaches, Rivers & Lakes	20	6.3%
Arts, Heritage & Museums	19	6.0%
Walking & Biking Trails	18	5.7%
Boat & Fishing Tours & Re..	15	4.7%
F&B Experiences	13	4.1%
Golf	11	3.5%
Lookouts, Bridges, Jetties	10	3.1%
Entertainment & Recreati..	9	2.8%
Guided Tours	8	2.5%
Wildlife Viewing & Farms	5	1.6%
Wellness	3	0.9%
Total	**318**	**100.0%**

Share of Product by Distrct

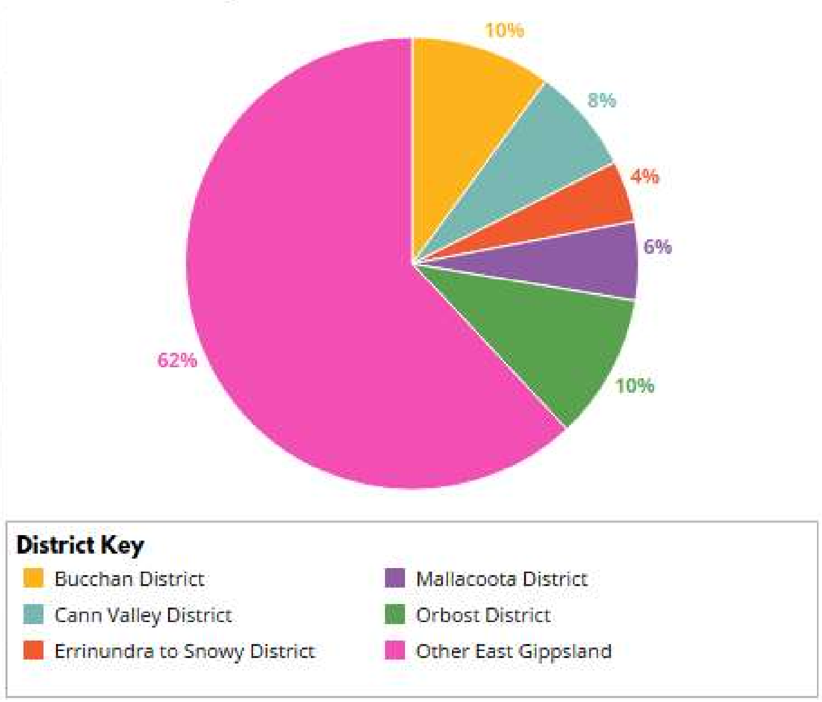
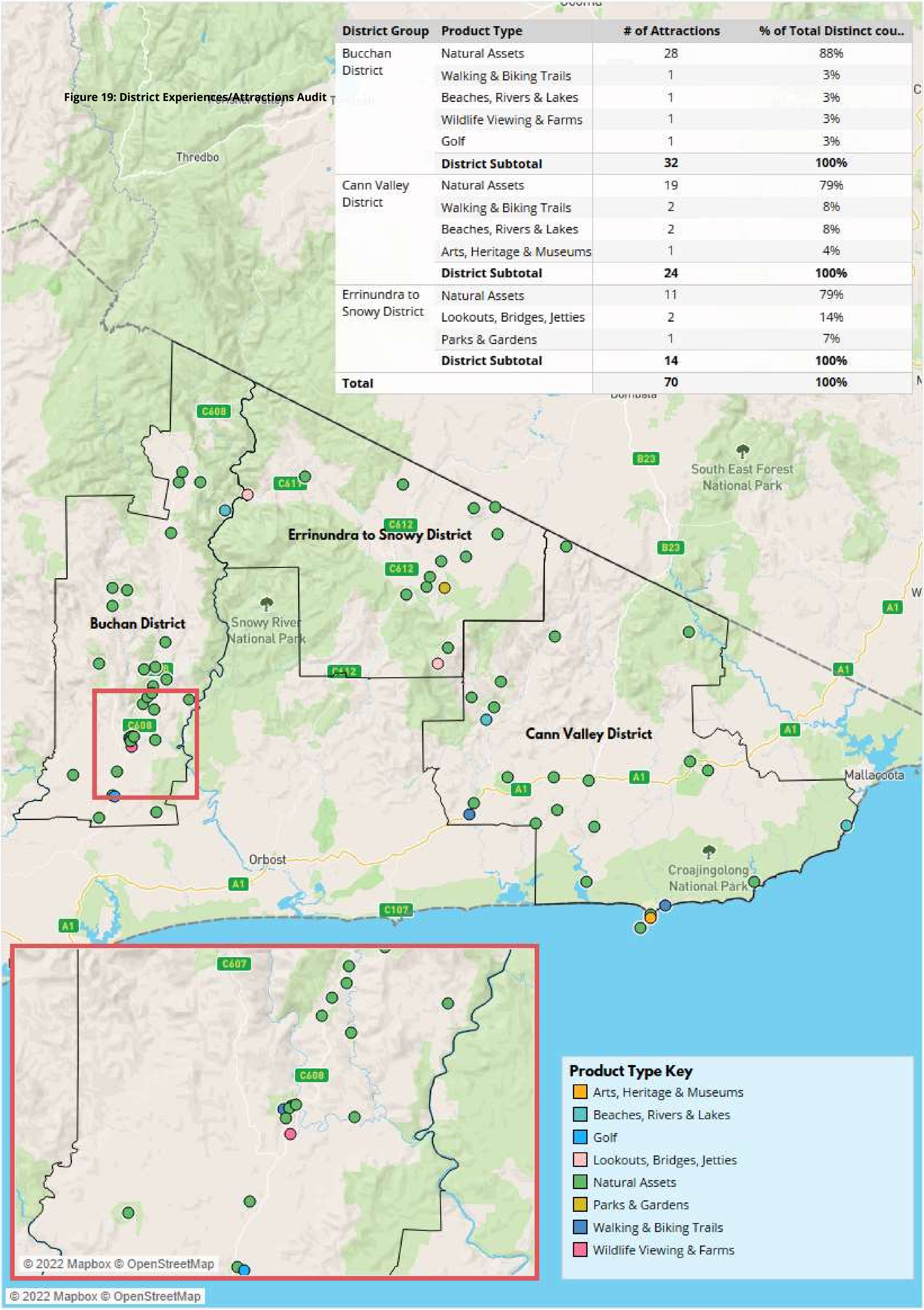


Figure 19: District Experiences/Attractions Audit



District Group	Product Type	# of Attractions	% of Total Distinct cou..
Bucchan District	Natural Assets	28	88%
	Walking & Biking Trails	1	3%
	Beaches, Rivers & Lakes	1	3%
	Wildlife Viewing & Farms	1	3%
	Golf	1	3%
	District Subtotal	**32**	**100%**
Cann Valley District	Natural Assets	19	79%
	Walking & Biking Trails	2	8%
	Beaches, Rivers & Lakes	2	8%
	Arts, Heritage & Museums	1	4%
	District Subtotal	**24**	**100%**
Errinundra to Snowy District	Natural Assets	11	79%
	Lookouts, Bridges, Jetties	2	14%
	Parks & Gardens	1	7%
	District Subtotal	**14**	**100%**
Total		**70**	**100%**

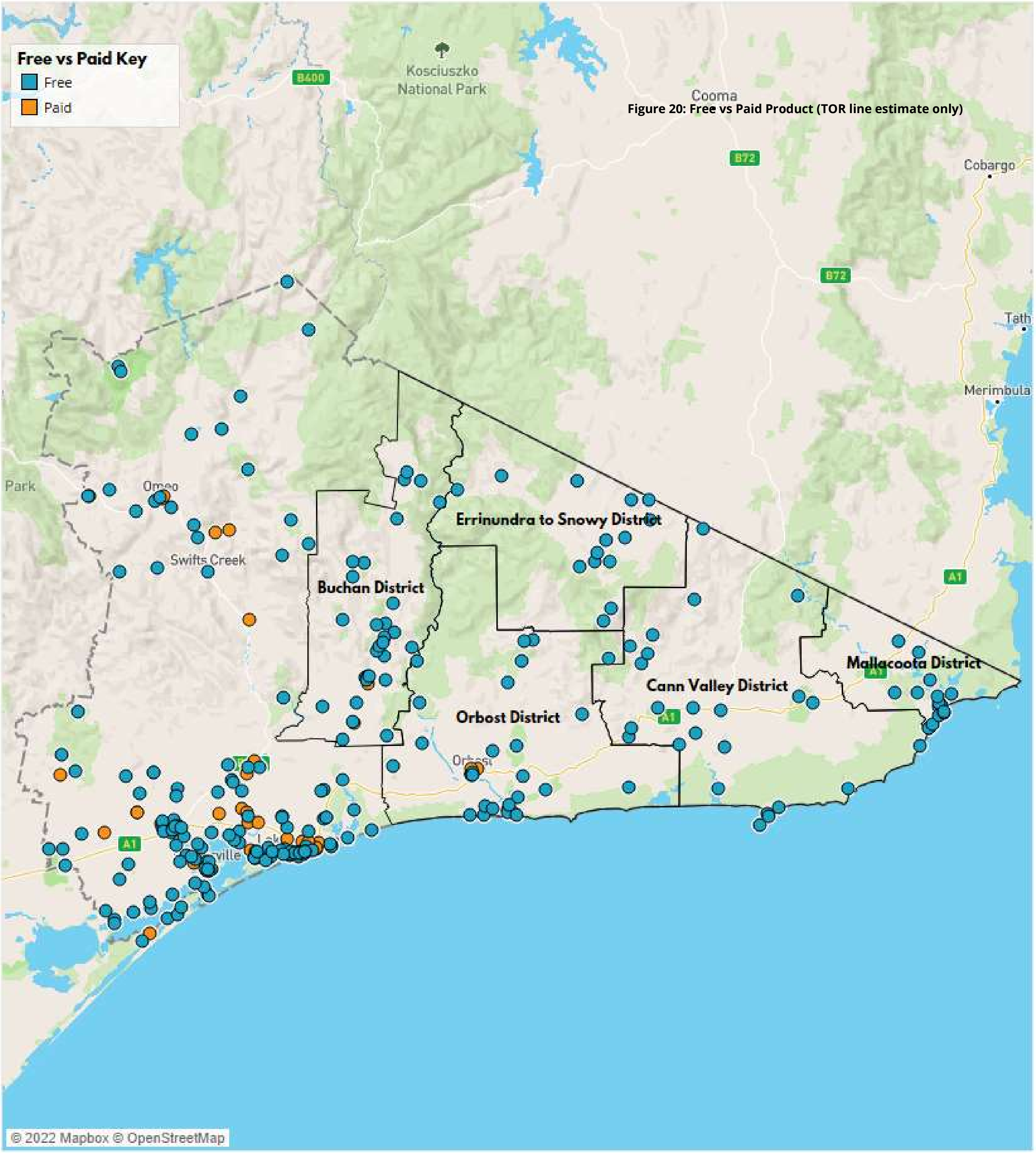
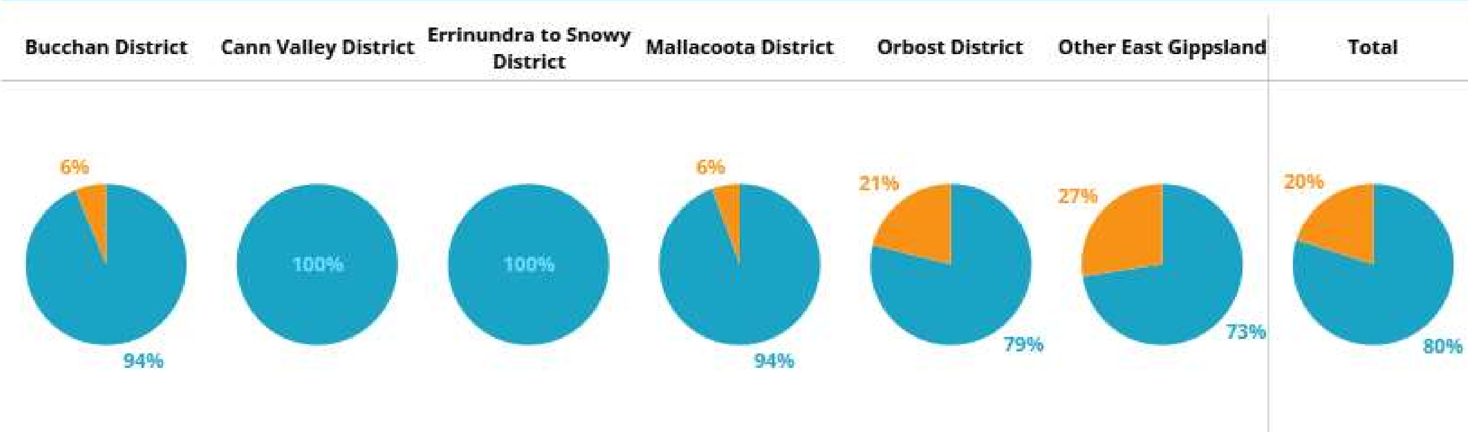


Figure 20: Free vs Paid Product (TOR line estimate only)



1.7.3.2. Experiences/Attractions Sentiment

Table 8 provides a summary of the NPS results for the Shire's mix. In a similar fashion to the accommodation sentiment study, analysis has not been provided on a district level because there are not enough properties that have enough reviews to break it down to this level with a reliable sample size. NPS scores were able to be obtained for 123 of the 318 attractions identified in the audit (those products with less than 5 reviews were excluded from the assessment). The findings are as follows.[23]

- The Shire's experiences/attractions receive an overall NPS of +56, based on 9,620 reviews across 123 different attractions. This is a good NPS rating and rates above the accommodation NPS achieved (+45).
- The product category which receives the highest average NPS score is guided tours, with a very high NPS of +88 (based on 176 reviews across 4 different products). This is followed by F&B experiences (wineries, breweries, cooking schools etc.) with an NPS of +72 (based on 712 reviews across 11 different products and boat and fishing tours and hire (+61, based on 1,075 reviews).
- Interestingly, across the Shire, the top four categories of products (by NPS score) all comprise paid products. This demonstrates that consumers are not averse to paying for quality products.

Table 8: Experiences/Attractions NPS Summary

Product Type	# of Attractions	# of Reviews	Avg. NPS
Guided Tours	4	176	+88
F&B Experiences	11	712	+72
Boat & Fishing Tours & Rental	12	1,075	+61
Wildlife Viewing & Farms	3	160	+59
Lookouts, Bridges, Jetties	7	880	+57
Beaches, Rivers & Lakes	10	324	+57
Natural Assets	20	2,159	+57
Arts, Heritage & Museums	14	1,204	+54
Entertainment & Recreation	8	553	+52
Walking & Biking Trails	10	445	+52
Golf	9	362	+47
Wellness	2	53	+45
Parks & Gardens	13	1,517	+43
Total	**123**	**9,620**	**+56**

[23] The data scraping for NPS scores was undertaken in September 2021. The number of reviews therefore is reflective of this period. It excludes any product with less than 5 reviews.

1.8. BARRIERS TO GROWTH

For the Buchan District to develop and grow as a sustainable visitor destination, a number of challenges and barriers need to be addressed (Table 9). Many of these barriers were identified during the consultation and analysis undertaken for this TOR. Importantly, they have not been included as a criticism – many other destinations have the same challenges – however, to mitigate or resolve these, first requires an acknowledgment of them. Section 2.2 of this TOR outlines opportunities that may mitigate or resolve these barriers.

Table 9: Barriers to growth

Barrier	PRODUCT DEVELOPMENT	INFRA-STRUCTURE	GOVERNANCE	SUSTAINABILITY	MARKETING & PROMOTION
A 5-star natural environment, minimal 3-star built environment	●	●			
Ability to secure public liability insurance	●				
Activating National Park areas and upgrading due to deferred maintenance	●	●		●	
Climate change impacts	●	●	●	●	●
Consistency of interpretation and directional signage		●			●
Digital literacy of operators					●
Economic leakage of overnight visitors out of district as many come as day visitors					●
Gaining community agreement on acceptable levels of visitor economy growth				●	●
Lack of a clear destination brand proposition/brand					●
Lack of coordination, collaboration & structure for tourism driven at a community level			●		
Lack of reinvestment into ageing infrastructure		●			
Limited accommodation stock for overnight accommodation	●			●	
Limited all-weather paid visitor experiences	●				●
Limited commissionable tourism experiences	●			●	●
Limited community awareness of the importance of tourism				●	●
Limited critical mass population to support viability of operations		●			
Limited evening activities to help grow overnight visitation	●			●	●
Limited export-ready product	●				●
Limited food and beverage outlets	●			●	
Limited fuel suppliers and petrol stations	●	●			
Limited number of family-friendly visitor experiences	●				●
Limited retail trading hours					●
Limited tourism-based job opportunities				●	
Ongoing logging on old-growth forest				●	
Need for business upskilling (digital, accounting, business development etc.)	●				●
Regional visitation data challenges	●				●
Seasonality of visitation	●	●		●	●
Slow replacement of walking tracks and picnic facilities and signage impacted by the bush fires in 2017-2018		●			

PART 2: OUR PLAN OF ACTION

Identifying a vision for the district going forward, opportunities to grow the visitor economy and outlining how these should be implemented.

2.1. STRATEGIC FRAMEWORK

Figure 21 outlines the vision and themes that have guided the development of this TOR.

Figure 21: TOR Vision & Themes

2.2. RECOMMENDATIONS FOR SUSTAINABLE GROWTH

A variety of recommendations have been identified through this TOR process. They have been included because they:

- mitigate or overcome the barriers to growth;
- assist in activating the identified destination vision;
- align with broader destination management work already completed, particularly the Gippsland Destination Management Plan;
- provide the necessary building blocks to develop a sustainable visitor economy; and/or
- offer the potential to grow the visitor economy sustainably, focusing on growing visitor yield rather than visitor numbers, and maintaining community support (and a social licence for tourism activity) going forward.

The recommendations have been grouped according to the destination themes identified in Section 2.1.

2.2.1. Boutique Accommodation

Introduce new accommodation products to diversify the district's accommodation base and support greater overnight visitation.

- **Advocate for upgrades to the Balley Hooley Camping Area:** While the existing Balley Hooley camping area (managed by Parks Victoria), is recognised as a basic campground, it does require upgrades. This includes providing a new toilet block (with large water storage) to replace the existing portable toilets, better designated/managed camping areas and road upgrades. It is understood that funding has already been secured for developing access stairs to the Snowy River to assist with getting canoes and rafts out.
- **Assess opportunities to expand the district's accommodation base:** There is limited accommodation in the district which is one of the major constraints for encouraging visitors to stay overnight in the area. An accommodation feasibility could be undertaken to assess the need for and the feasibility of introducing new, mid-range quality boutique accommodation. This could include developing an eco-cabin design (see the following recommendation) rather than focusing on Crown/council land while also investigating the possibility of introducing pop-up/temporary accommodation until its viability is ascertained.
- **Accommodation advice should be considered to assist potential accommodation providers to understand the options available**: Research should be undertaken to identify suitable cabin designs that meet the particular needs of East Gippsland (in particular fire ratings). The East Gippsland Shire Council Planning Department can be consulted to identify planning requirements noting that land zoned farming in the Shire is allowed to accommodate up to 10 beds for temporary (tourist) accommodation and can allow camping and caravan parks with a permit. The farming zone states:
  - A permit is not required if no more than 10 persons are to be accommodated away from their normal place of residence
  - at least 1 car parking space must be provided for every 2 persons able to be accommodated away from their normal place of residence
  - but a permit is required for a camping and caravan park

Figure 22: Balley Hooley Camping Area

2.2.2. Nature-Based Tourism Experiences

Introduce a range of new/enhanced tourism experiences that enable visitors to connect with and experience the district's natural environment and have a positive impact on the district and its community.

- **Wild caving tours:** The district offers a wide range of wild caves which attracts several speleologists from throughout Victoria and other states. There are wild cave sites close to Buchan township making it highly accessible and existing caving clubs have their own accommodation hostel in the region as well. Importantly, there is a wide range of cave experiences to offer those experiences ranging from highly complex cave systems to simple ones to navigate, with a guide.
- **4WD tours and training:** The district has many unsealed roads often in highly picturesque locations. Finding experienced 4WD tour operators to promote trips and training programs for ½ day to 1- and 2-day tag-along excursions is worthy of investigation and it is understood that interest to operate these has already been expressed. Issues such as insurance coverage, however, need to be carefully assessed so premiums are manageable.
- **Fishing and hunting tours with licensed guides:** A variety of rivers in the region offer seasonal fishing experiences for trout etc, along with potential hunting for deer and wild pigs. There is a requirement for trained tour guides (wild caving, fishing, hunting guides etc.) to ensure that appropriate standards are maintained. This may require Council or state government agencies to offer to coordinate training programs to allow locals with interest to get registered and up skilled.
- **Drive trails ex-Buchan**: In addition to the potential for 4WD tours and training, the road network around the region may offer a number of drive circuits to encourage visitors to spend more time in East Gippsland, to spend more widely where food and beverage and other amenities are available for them, and to strengthen the link between various towns and villages through Errinundra to Snowy, Cann Valley and various locations in and around Buchan itself.
- **Mountain Biking circuits:** There are several unsealed roads throughout the district that link to forested areas and national parks. These could be further developed and promoted to offer opportunities for mountain bikers without the need to create separate and expensive mountain biking dedicated trails. Avoidance of conflict between mountain bikers and other road users will be essential so low trafficked roads will be required.
- **Nature tours:** Although an ecological study has not been undertaken, anecdotal feedback indicates that fauna and flora offer a wide range to support bird watching and various nature tours covering frog species etc. These experiences could be operated by local community members with nature-based experience and where potential self-guided tours may also be possible if information can be developed and put online via apps etc.
- **White water rafting and kayaking tours:** As advised, rafting and kayaking tours already exist from MacKillops Bridge to Balley Hooley being the junction of the Buchan and Snowy Rivers. Depending on water levels and flows, the journey can take from 2 to 4 days, also dependent on what experiences people want to have enroute. It is noted that several school groups undertake rafting tours on these river systems as well. Encouraging visitors to stay in the Buchan district post a rafting or kayaking tour is important, so offering other tour options (mountain biking, nature-based etc.) become important value adds to advertise via Council and community websites etc.

2.2.3. Family-Friendly Things to Do

Develop a range of experiences that not only cater to families but also offer all-weather experiences to help address seasonality and provide things for families in the community to do.

- **Megafauna Discovery Centre:** What is missing in the district are all-weather attractions and experiences to encourage visitors to stay in the district when inclement weather occurs. Museums Victoria has advised that the Buchan area is rich in megafauna fossil findings that are quite unique in a national context. Such a facility may also complement the proposed Dinosaur trail being developed to cover sites from the coast to the alpine areas.

  What might be considered is an interactive all-weather indoor attraction experience (with an education learning facility with audio visual room) possibly at a site in the main street of Buchan such as the community hall site (which we are informed is underutilised), or in the Buchan Butter Factory or as a new purpose-built facility.

  To support the main street activation plan also being developed for Buchan, we would suggest that an assessment be undertaken of whether the current community hall facility could be partly used for a megafauna discovery centre, assuming that the community are supportive of this.
- **Redevelopment of the Buchan Butter Factory**: The Buchan Butter Factory is owned by the Buchan Heritage Group and while it has undergone renovations in the past, it is understood that the site may require flood mitigation work[24]. The building offers a very strategic location next to the main road and benefits from being part of a small precinct with other community facilities including sports grounds and existing parking. A feasibility study for the reuse/repurposing of the building should be undertaken if the Buchan Heritage Group supports this. As the Heritage Group has a desire for an archive room for safely storing documents and materials, the feasibility could also investigate this.

  While the building is not a large structure, with careful design and planning, the building may be able to be a multipurpose facility offering uses such as a historic heritage archive facility and storage room; a gin/vodka distillery with a small retail facility; small scale indoor function venue; outdoor event festival venue using the grounds around the building for future movie nights markets; and evening – night-time activation. The exterior walls of the building have been used to screen movies, so its use by the community is already recognised.

  The key to its future use and, ultimately, its success, is likely to be its ongoing use by the community as a key asset, as an attractive all-weather visitor attraction, and with a mix of free and paid uses/experiences so it can generate revenue streams to help support its upkeep and ongoing maintenance requirements. The building is in a high-profile location and a few other buildings appear to be available as alternative sites.
- **Pump track**: The potential exists to develop a pump track facility with an associated bike skills course (see Figure 23). This could be developed in tandem with the children's playground to offer an integrated attraction to support the local community first and then visiting families as well. This could have appeal to local families along with various visitor markets. The opportunity may exist to offer bike hire and a pop-up food and beverage offering, ideally if able to be linked to the main street of Buchan. These facilities, if built to the correct scale and quality, can often serve as biking event venues and at least, as a cluster of activities to encourage longer length of stay in an area and increased visitor spend levels.
- **Children's playground:** Offering a higher quality playground close to the main street (possibly at the nearby Bluff Reserve or within the precinct where the Buchan Butter Factory and sports infrastructure is located) should be investigated to benefit both local families and various visitor markets.
- **Overnight horse treks:** The district appears to have a number of bridle trails that may offer the potential for half- and full-day horse riding experiences along with the possibility of overnight horse treks. It is understood that there is an existing, highly skilled tourism operator with equine training who currently offers a horse/farm show in the district.

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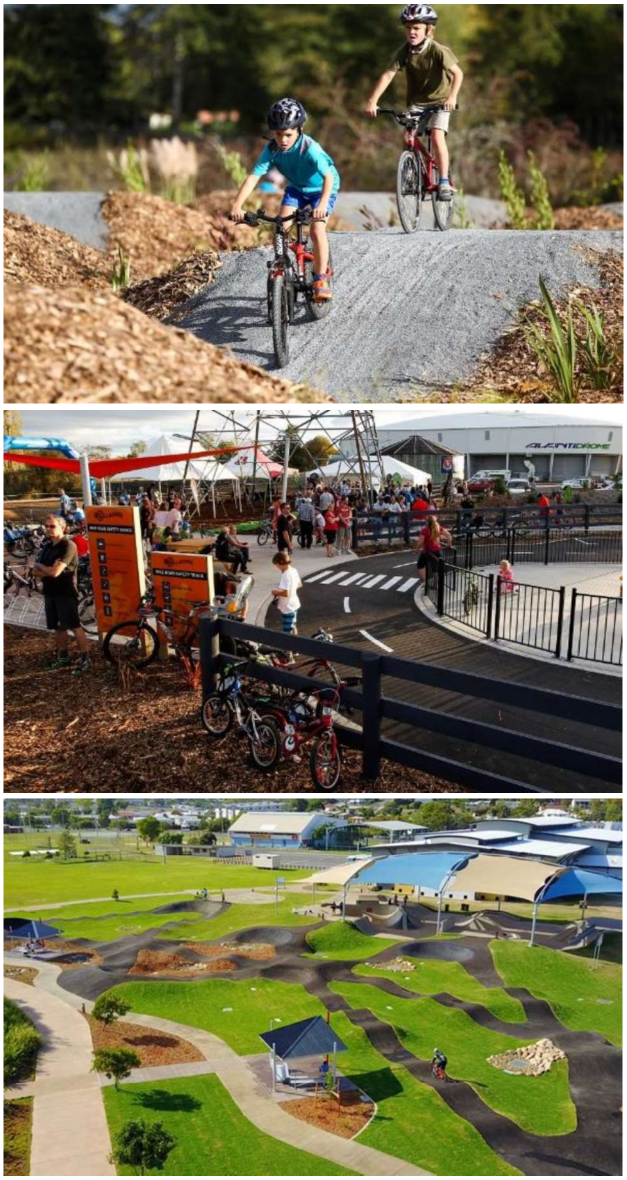
[24] As advised by community members, the adjacent river has changed its course on several occasions getting further from the building.

Figure 23: Bike Skills Parks & Pump Track Examples[25]



- **The Bluff Reserve development with a seasonal light show:** The Bluff Reserve is close to the Parks Victoria Buchan Caves Precinct, the Buchan Butter factory, and the Buchan main street. The potential may exist to offer a cliff face light show offering seasonal storytelling, noting there is sufficient land for seating/picnicking adjacent to the river and cliff face and with adequate parking as well. The area is well located to other town amenities (eateries etc.) and offering a nighttime activation could stimulate a stronger overnight visitor market as well as convert some of the day trip market currently coming to visit the caves, into a longer stay and spend market.

2.2.4. Marketing, Promotion & Events

Strengthen the destination brand proposition of the district through industry up-skilling, brand development and an enhancement of the district's digital presence.

- **Profiling of local legends:** In addition to a major main street activation program for Buchan, the potential may exist to profile on banners or signboards or via online options details of local legends such as Charlie West etc. Other options could be painting details of local legends on the side of local public buildings to help offer an art-cultural trail possibly linking the Buchan main street to the Buchan Caves scenic reserve, the sports precinct with the Buchan Butter Factory and with other local legends already displayed on the exterior of some buildings and with links to Bluff Reserve.
- **Smaller-scale events/expanded events calendar**: Events are a useful mechanism for promoting a destination and encouraging visitation during non-peak periods. The potential exists to investigate the introduction of a nature-based, adventure event leveraging the unique fauna and flora of the district. Another event that could be considered may include a triathlon, which could possibly incorporate the use of kayaks on the Buchan River, mountain biking/road cycling and a running component. Enhance the events calendar to encourage visitation in the off-season including consideration of how to contribute to the Winter Festival, connections with other Council events etc.
- **Media library:** There is currently limited digital imagery and media that promotes the district available online. A media library with up-to-date, high-quality imagery is important for event promotion and general destination profiling of the region. There may be existing highly experienced photographers in the region who may be prepared to contribute works (if due acknowledgment is provided) or to commission a professional photographer to help provide a media library/data bank of suitable high-resolution images which can be used for promotional purposes. Images in the 'Visit Victoria Content Hub' need to be updated by Destination Gippsland.

[25] Gallagher Bike Skills Park, NZ; and Gladstone Pump Track, QLD.

- **New forms of visitor servicing:** The visitor servicing landscape continues to shift dramatically. Council is looking at reassessing the best ways to offer visitor information to support industry needs and changing consumer trends. The opportunity may exist for the district to investigate integrating new forms of visitor information provision, including (but not limited to): engaging locals as roaming ambassadors, digital unmanned information centres, pop-up information vans and information containers, just to name a few. Visit Scotland is one of the leaders in information servicing and has adopted many of these forms of information provision and applied them throughout the country (see Figure 24) for this and other examples) including mobile visitor van facilities to enable these to be parked at event venues so information is taken to where visitors are gathered. Importantly, with limited mobile phone coverage, one cannot leave solutions to online only.

Figure 24: Alternative forms of information servicing[26]

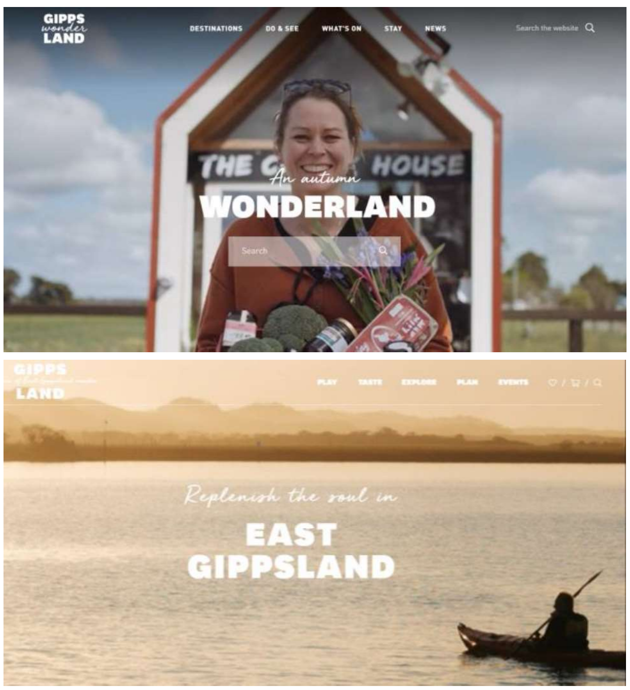
- **Destination events calendar:** Developing an up-to-date list of events that are occurring throughout the district and the broader region is valuable to make sure that any overlap in events does not occur. The list should distinguish between destination events that attract many non-locals (i.e., they are visitor focussed) and community-based events which are often smaller community-focused events. As the district has a relatively small local community, managing events and festivals may require bringing in others to help with this, if acceptable to locals.
- **Look Out Platform for Way Finding**: Install a platform on Old Buchan Road that acts as the lookout and gateway to the Buchan Valley story. Consider integrating visitor information, wayfinding and storytelling. Consider a place to capture "instagramable" phoTOR that could be tagged with #BuchanValley to further enhance the district's digital marketing strengths.
- **Host community tourism awareness-raising campaign:** Although parts of the host community understand and accept the importance of the visitor economy for the district, there are parts of the community that are not as supportive. Tourism can generate many part-time and full-time jobs for residents and is a solid contributor to economic output and GDP. There is benefit in therefore creating a broad-reaching visitor economy awareness campaign, that informs the local community, in an easy-to-understand way, why tourism is very useful as a sector through its ability to spread the economic benefits from it quite widely. This is particularly the case where industries such as logging and resource extraction/mining, for example, are viewed as sunset industries and where a more diversified economy is seen as beneficial.

[26] TOR 3: Visit Scotland visitor information servicing; St Kilda Information Combi Van; Copenhagen Museum Automated Information Container;

- **Destination branding & greater profile on Visit Gippsland and Visit East Gippsland websites:** There is a need for stronger profiling of the district on the regional destination website along with the local destination website (see Figure 25)[27]. However, to facilitate this, there is a need to ensure operators are listed on the ATDW (which feeds into Visit Victoria's state destination website, along with regional websites) and to ensure there is ample digital media and collateral of the district and its products. Currently, there is limited higher-quality information and media about the district online. The development of product packages could also be investigated.

A district-level destination website and brand should only be considered once the district has ample product to market, with marketing and branding collateral developed and a sufficient budget to develop and promote the website. For the short to medium term, it will be far more effective to leverage off the existing Visit Gippsland and Visit East Gippsland websites.

Figure 25: Regional and local destination websites



2.2.5. Infrastructure & Industry Support

Ensure that investment in key infrastructure and visitor servicing meets community needs and also delivers to the various visitor markets.

- **Visitor Information Services:** Enhance the visitor information services in the Buchan township through consideration of partnering with others to enhance face-to-face visitor information and storytelling, enhanced wayfinding, boards, and other physical infrastructure and connecting visitors to digital information
- **Development of overflow parking:** Overflow parking[28] is needed in Buchan for RVs and those towing caravans and trailers etc.
- **Development of an RV dumpsite:** Continue to advocate for the development of an RV dump site within the district. It is understood that the project has been funded by Council as a project to be delivered. Flood-prone sites and a lack of available land in Buchan may mean this dumpsite has to be located on private land with RV camping already designated.
- **Integration strategy for wider visitor precinct**: this is being developed as part of a main street activation project with the potential for a megafauna trail, art trail etc. Integration strategy for wider visitor precinct containing Buchan Caves Reserve (Parks Victoria), Buchan main street with new Megafauna Discovery Centre as anchor attraction and Buchan Butter Factory site repurposed (pedestrianize the links, add signage, and cross-promote
- **Industry upskilling workshops (social media, digital literacy, IT, marketing, and finance up-skilling):** There is a need for those in the visitor sector (and those contemplating getting involved) to continue to upskill to understand and apply social media and digital programming requirements which offer a far more cost- and time-effective way to reach a wider range of visitor markets. The council may need to take a role in facilitating free training programs for all industry operators and other interested parties on how to move into the digital space and to potentially offer regular monitoring of industry players to ensure change is occurring. Tourism industry associations often have numerous training and upskilling programs along with facilitators/trainers to support regional industry growth needs.

[27] www.visitgippsland.com.au and https://www.visiteastgippsland.com.au/

[28] This will require an assessment of traffic engineers to determine the length and number of longer parking sites and their optimum location in Buchan

Figure 26: One Tree Hill Lookout vista

- **Local Lookouts and Sites:** One Tree Hill Lookout and Picnic Area are managed by Parks Victoria. It is currently a popular spot for sightseeing and picnics, along with offering a number of tracks for walking, cycling and running. To improve amenity at the site, it would benefit from interpretative and directional signage boards, picnic facilities and a possible diorama to outline major mountain peaks in the distance. Balley Hooley Junction upgrade is already funded but activation needs to be fast-tracked if possible. Improvements are also needed for Little River Falls and Tulloch Ard.
- **Signage on Princess Highway Turnoff (Red Knob):** Enhance tourism signage at Red Knob to include signage for Buchan Valley, McKillops Bridge, and other visitor destinations.
- **Tourism investment strategy:** A strategically focused and well-integrated investment strategy is needed to help activate the tourism opportunities identified in this TOR. This will also help provide a more holistic, planned approach that links these important elements, to pedestrianise them via clever landscaping, signage etc, will offer the chance to cross-promote them and will assist in developing a consistent quality standard for the public realm.
- **Wayfinding signage:** A signage audit should be undertaken to identify signage gaps, ensure a consistent approach to signage is applied and assess the need for multi-lingual signage in certain locations for the future. Signage is particularly important in areas where there is limited mobile phone coverage.
- **Review of public toilet facilities:** Council, DELWP and Parks Victoria should undertake a public toilet review to assess capacity and determine if a need exists for additional public toilet facilities around the district and wider region. Locations such as Balley Hooley Junction would benefit from a permanent toilet block with adequate water storage facilities. It is important that the district and wider region offer adequate public toilets along with ensuring these are able to remain open and are well-maintained.

2.2.6. The Priority Projects

The following priority projects have been identified through the workshops held with the Buchan TOR Working Group, key stakeholder agency input and the community. Importantly, these are driven from a community/industry operator level up and reflect activations that are more likely to be supported.

It is important to note that although there are a number of projects identified in this TOR report, the focus needs to be kept tight, and on the priority projects first and foremost: creating a large wish list of projects and trying to achieve all these is not a viable way to activate tourism opportunities.

Once these priority projects are activated and completed, other projects can then be looked at. The concept is to avoid trying to do too much at once and allow the community to focus on a few projects which can act as catalysts to support others.

Table 10: The Priority Projects

> Boutique Accommodation

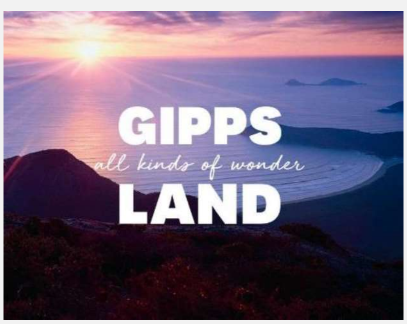
- **(PFE)** Advocate for upgrades to the Balley Hooley Camping Area
- **(PRFN)** Introduce an eco-cabin design as boutique accommodation

> Nature-Based Tourism Experiences

- **(PRFN)** Wild caving tours
- **(PRFN)** 4WD tours and training
- **(PRFN)** Fishing and hunting tours with licensed guides

> Family-Friendly Things to Do

- **(PFN)** Megafauna Discovery Centre
- **(PFN)** Pump track
- **(PFN)** Children's playground
- **(PPPN)** Redevelopment of the Buchan Butter Factory



> Marketing, Promotion & Events

- **(PFN)** Destination branding & greater profile on Visit Gippsland and Visit East Gippsland websites

> Infrastructure & Industry Support

- **(PFN)** Development of overflow parking
- **(PFN)** Integration strategy for wider visitor precinct
- **(PFN)** Improvements to One Tree Hill Lookout
- **(PRFN)** Development of an RV dumpsite

PFN = Public funded, new project | **PFE = Public funded, existing project**
PRFN = Private funded, new project | **PPPN = Public-private partnership, new project**

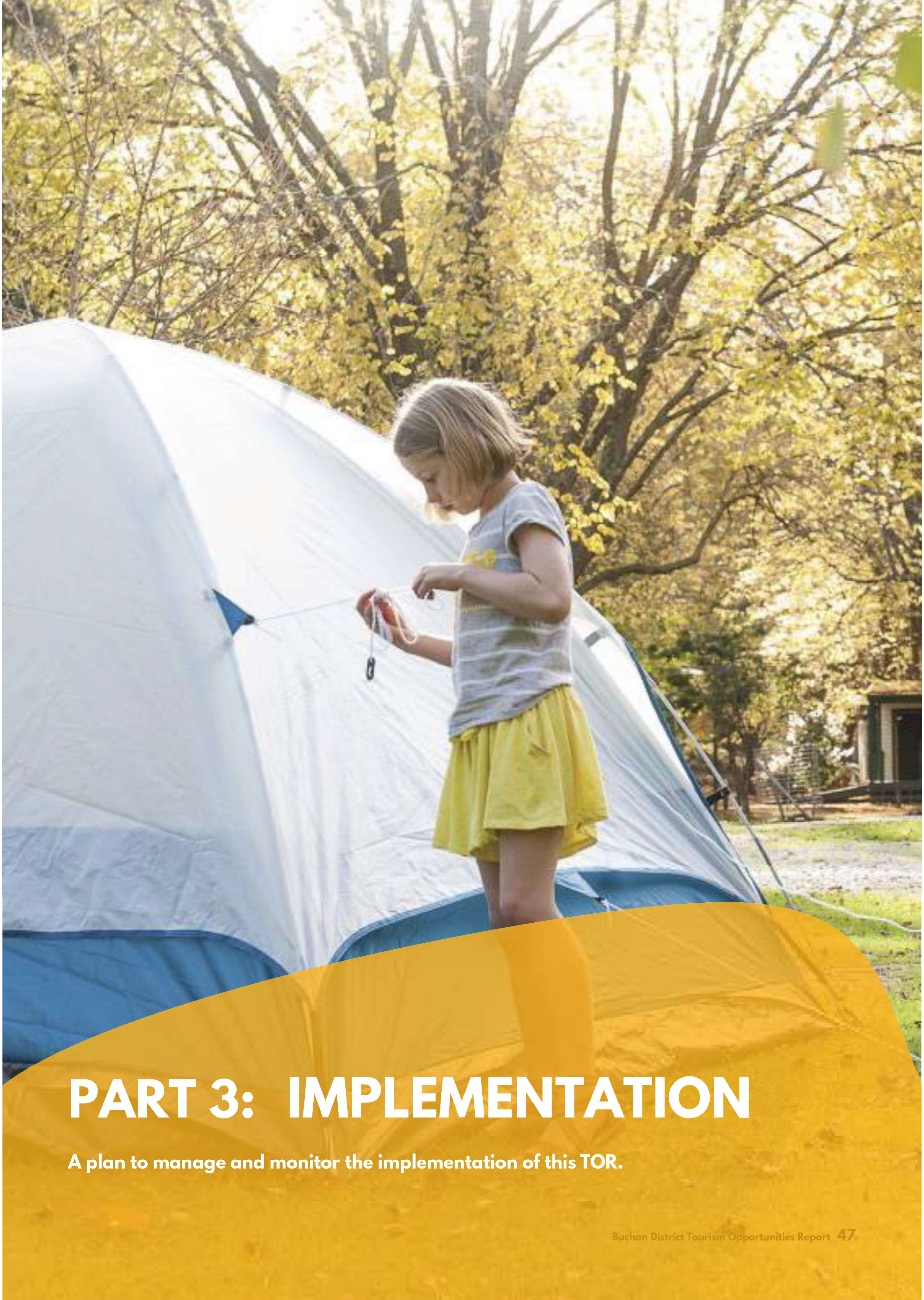
2.2.7. The Top 4 Projects

The priority projects have been workshopped with the Buchan District community and the following were identified as the top four projects to initially pursue. These offer an immediate starting point and highlight a good mix of community-local operator-driven initiatives along with some which require the involvement of the Council to help facilitate some projects.

Each of these priority projects is aimed at increasing the length of visitor stay in the district, along with higher visitor spend levels.

Figure 27: The Top 4 Projects

Destination branding & greater profile on Visit Gippsland & Visit East Gippsland websites	**Redevelopment of the Buchan Butter Factory (note that the external walls have previously been used as a cinema screen for local entertainment and the building has also been used previously as a backdrop for performances)**	**Children's playground (for local community use first and foremost and to encourage a family market)**	**Pump track (for local community use first and foremost and to encourage a family market)**



PART 3: IMPLEMENTATION

A plan to manage and monitor the implementation of this TOR.

3.1. POTENTIAL IMPLEMENTATION ACTION PLAN

Table 11 - Table 15 provides the action plan to assist in delivering the various priority projects identified in this TOR. It highlights the:

- activations needed to kick start this TOR;
- key agencies who should collectively be engaged to drive public projects;
- an estimated time frame for effective activation noting that many may change over time as resources are revised and priorities potentially change; and
- indicative budget required for feasibility studies, or strategies required to be undertaken.

All of the actions in this potential implementation plan are subject to feasibility studies and securing appropriate funding.

The reason why all projects are not listed in the implementation plan is because the timing of these will likely need to change due to externalities occurring including new funding programs and industry-operator interest based on the achievement of the priority projects. Our strong recommendation is to, therefore, focus on the priority projects only, as getting these activated quickly is essential for obtaining community buy-in and industry support for the TOR.

This implementation plan needs to be considered a working document and, as such, it needs to remain fluid to take account of the needs of different stakeholders and their ability to undertake actions along with their other responsibilities. This is especially the case for the community and industry within the district, who may want to commence slowly into tourism ventures. How this TOR implementation plan, therefore, fits into existing council programs will require additional consideration which in turn, may necessitate some timeframes being adjusted. In addition, there may be some council areas where parallel activities are already being undertaken or are already planned so time frames can be aligned to reflect this.

The implementation plan reflects that this is for the Buchan District only, noting that separate implementation plans have been prepared for Errinundra to Snowy District and Cann Valley District. Each of these communities is quite different in what they see as priority projects to focus on and what the community/industry is interested in activating. This exercise is not so much about who has the most projects to activate, but more about who can get some tourism opportunities activated more quickly and efficiently.

Finally, several projects will necessitate feasibility studies and business cases to support funding especially and to assess the scale and capital investment requirements. This detail was outside of the scope of this TOR exercise, which is focused on a pragmatic and strategic level.

Concerning the timeframes indicated in the implementation plan:

- Short term: reflects those that could be activated within the next year (2022-23 financial year [FY])
- Medium term: reflects those that could be activated within the five years from 2023-24 – 2027-28 FY
- Long term: reflects those that could be activated in and beyond 2028-29 FY

Table 11: Implementation Plan – Boutique Accommodation Priority Projects

	Recommendation	Action	Who	Budget	When
★	Advocate for upgrades to the Balley Hooley Camping Area[29]	■ Assess opportunities for a toilet block to replace the portaloos, a large water storage tank, create designated bookable camping sites, look to improving the access road in, signage ■ Create a promotional campaign to encourage visitation	Parks Victoria, Council (roading commitment) with community input	TBA	Short term
★	research to identify suitable cabin designs that meet the particular needs of East Gippsland (in particular fire ratings)	■ The East Gippsland Shire Council Planning Department can be consulted to identify planning requirements ■ land zoned farming in the Shire is allowed to accommodate up to 10 beds for temporary (tourist) accommodation and can allow camping and caravan parks with a permit ■ Identify sites for consideration based on landholder interest in offering 1-3 cabins per site ■ Look to create a style of cabin/cottage for farm stay/Airbnb letting with green technology applied and lower cost prefabrication where possible ■ Create a fast-track approval process for suitable sites with a cabin model	Council, landowners	TBA but <$100k for likely design work. Ideally, less than $250k per cabin for construction with a design applied	Medium term

Table 12: Implementation Plan – Nature-Based Tourism Experiences Priority Projects

	Recommendation	Action	Who	Budget	When
★	Wild caving tours	■ Engage local speleology clubs and industry associations to identify locations for guided tours ■ Work with interested parties to ensure insurance and related accreditation requirements are met ■ Promote the region as a haven for wild cave exploration	Local speleology clubs, council, Parks Victoria and DELWP	<$100k	Short term
★	4WD tours and training	■ Assess local operator interest in developing 4WD tours ■ Determine insurance and related requirements ■ Develop a promotional program	Council, industry operators	<$100k for start-up	Short term
★	Fishing and hunting tours with licensed guides	■ Assess local operator interest in developing guided fishing and hunting tours ■ Determine insurance and related requirements ■ Create a simple business case to test the viability ■ Develop a promotional program	Council, industry operators	<$100k for start-up	Short term

[29] Many items already have funding secured but project needs to be fast tracked now

Table 13: Implementation Plan – Family-Friendly Things to Do Priority Projects

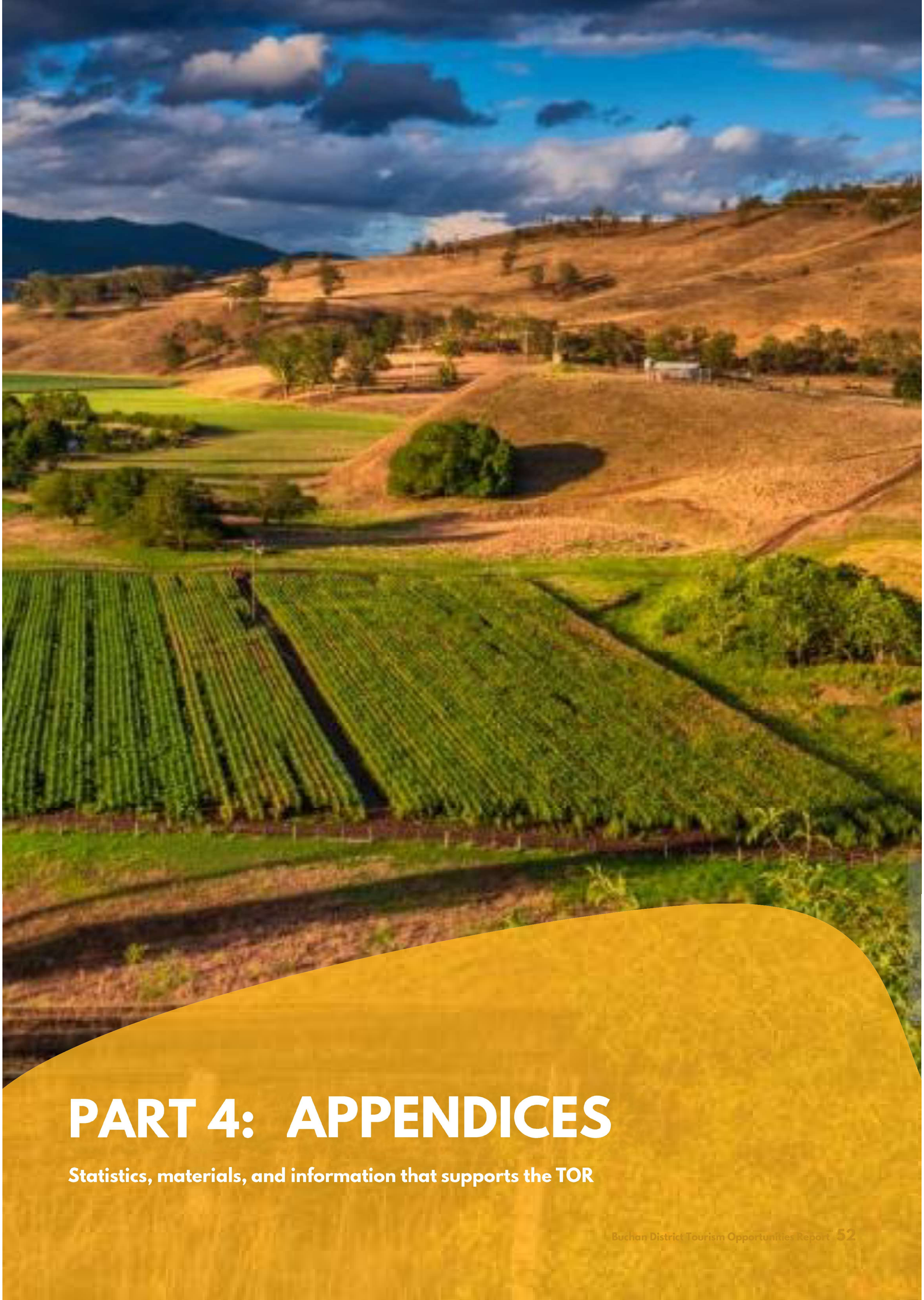
	Recommendation	Action	Who	Budget	When
	Megafauna Discovery Centre	■ Assess all site options for Buchan as a new major visitor experience to complement the Buchan Caves experience. Options include the Buchan Community Hall, Buchan Butter Factory, or a possible new build ■ Determine who will manage it and the ongoing operating model ■ Determine funding sources	Council, Museums VIC, Parks Victoria, Reg Dev VIC, RTO	$300k for feasibility and detailed design $12m est. for capex	Medium term
	Pump track	■ Undertake site assessment to identify preferred location ■ Commission experienced designer to quote for the development of the pump track	Council	$300k	Medium term
	Children's playground	■ Undertake site assessment to identify preferred location ■ Commission experienced designer to quote for the development of the playground	Council	$450k	Medium term
	Redevelopment of the Buchan Butter Factory	■ Identify short-term activations such as reinstating the outdoor movie nights previously held on-site pre-bush fires (pre-2017) ■ Complete feasibility assessing retrofitting the building for various purposes including a heritage archive for the historic society, potential indoor small event-function space, possible gin/vodka distillery and the outdoor area for markets and events	Council, historic society, community	$50k for the business case and feasibility, $250k for detailed design drawings with heritage study Construction costs TBA $7m est. for capex	Medium term

Table 14: Implementation Plan – Marketing, Promotion & Events Priority Projects

	Recommendation	Action	Who	Budget	When
	Destination branding & greater profile on Visit Gippsland and Visit East Gippsland websites	■ Potential portal to Destination Gippsland website ■ Buchan district product and events web presence	Council with industry input	<$100k	Medium term
	Event calendar enhancements	■ Enhance the events calendar to encourage visitation during the off-season including consideration of how to contribute to the Winter Festival, connections with other Council events etc.	Council, community	TBA	Short-medium term

Table 15: Implementation Plan – Infrastructure & Industry Support Priority Projects

	Recommendation	Action	Who	Budget	When
★	Development of overflow parking	■ Identify sites for consideration based on research of market needs ■ Establish traffic engineering for a preferred site and fund accordingly	Council, community, RDV	TBA	Medium term
★	Integration strategy for wider visitor precinct	■ Create pedestrian-friendly accessibility between the various precincts with signage, online information, and other activations to help the integration of areas ■ Determine funding options ■ Look to cross-promote	Council, Parks Victoria, community	TBA	Medium term
★	Improvements to Lookouts	■ Enhance existing sites with directional and interpretative signage and a diorama displaying major peaks and landscape features visible from the site ■ Picnic facilities and information boards for displaying relevant visitor information	Parks Victoria, Council, community	TBA	TBA by Parks Victoria
★	Development of an RV dumpsite	■ Identify preferred sites and negotiate with landholders ■ Look to collocate with RV camping if possible	Council and landholders	Already funded	Medium term
★	Lookout and info platform on Old Buchan Road that acts as the lookout and gateway to the Buchan Valley story	■ Identify site and secure use ■ Determine options for information sharing and display boards ■ Secure funding and implement	Council and landholders	TBA	Medium term
★	Improved visitor information services	■ Enhance the visitor information services in Buchan township through consideration of partnering with others to enhance face-to-face visitor information and storytelling, ■ enhanced wayfinding, boards, and other physical infrastructure and ■ connecting visitors to digital information	Council, community and RDV	TBA	Short-medium term
★	Signage at Princess Highway turnoff (Red Knob)	■ Enhance tourism signage at Red Knob to include signage for Buchan Valley, McKillops Bridge, and visitor destinations	Council, community and RDV	TBA	Short-medium term



PART 4: APPENDICES

Statistics, materials, and information that supports the TOR

Appendix 1 Visitation to East Gippsland Shire SA2s

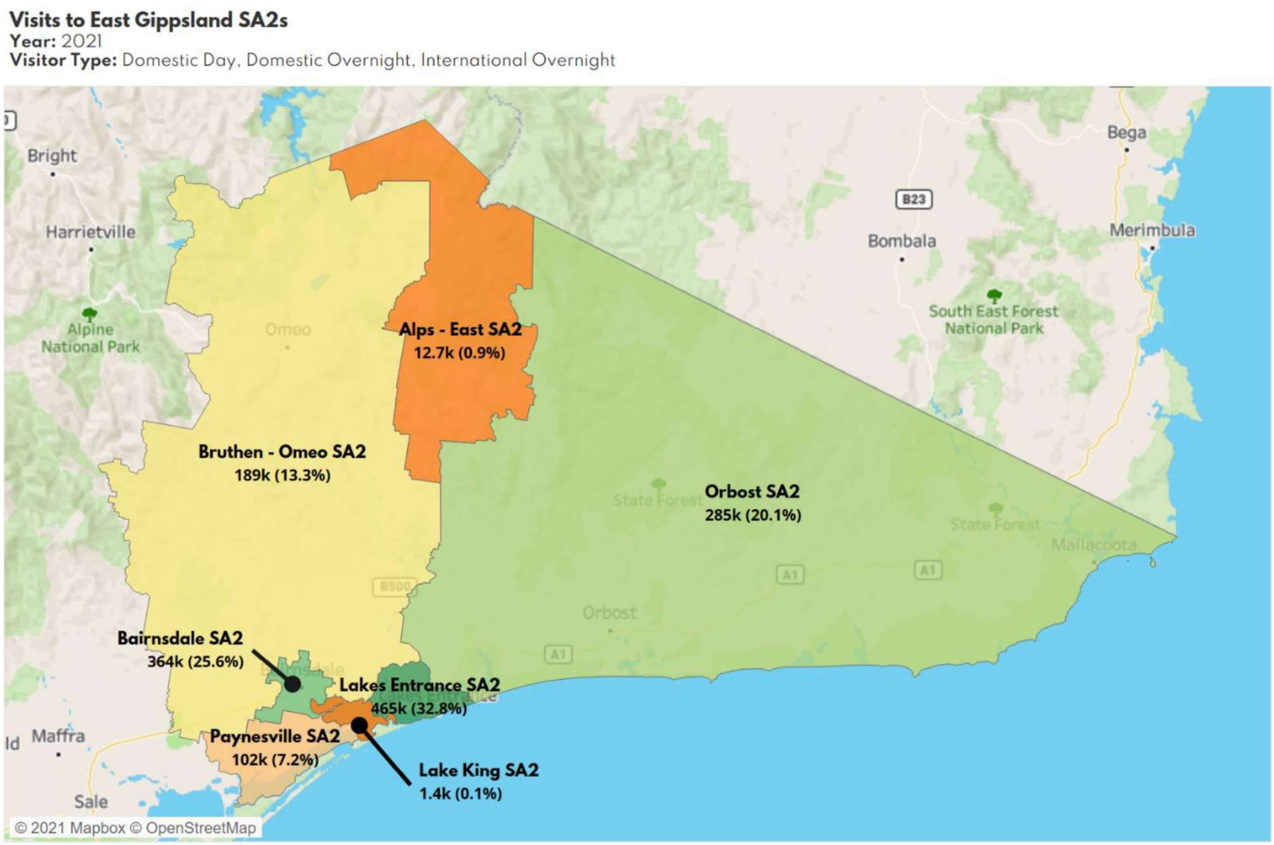
+ Total Visits

Figure 28 demonstrates visits to each SA2 within the East Gippsland Shire in 2021. It demonstrates the following.

- Lakes Entrance SA2 receives the strongest level of visitation, comprising 33% of visits to the region. This is followed by Bairnsdale SA2 (26%) and Orbost SA2 (20%).
- Lake King SA2 receives the smallest number of visitors (comprising 0.1% of regional visitation), followed by Alps – East SA2 (0.9%).

For this TOR, which is focused on Cann Valley, Orbost SA2 is the SA2 to be primarily focused on.

Figure 28: Visits to East Gippsland SA2s (2021)[30]



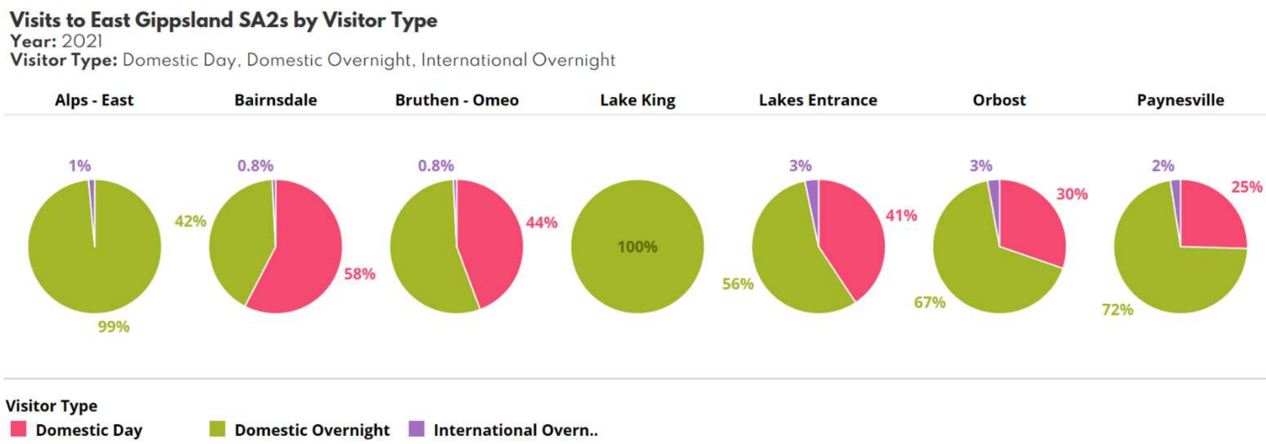
[30] TRA, compiled by Stafford

+ Visitation by Type

Figure 29 segments visitation to each SA2 in East Gippsland by visitor type. It demonstrates that visitation to some SA2s is dominated by the domestic overnight market (Alps – East SA2 and Lake King SA2) while others have a more even distribution amongst domestic overnight and day visitation (Bairnsdale SA2 and Burthen – Omeo SA2). International overnight visitation to each of the SA2s represents a small share of total overall visitation.

Visitation to Orbost SA2 (the focus of this TOR) is distributed amongst domestic overnight visitors (67%), domestic day trippers (30%) and international overnight visitors (3%).

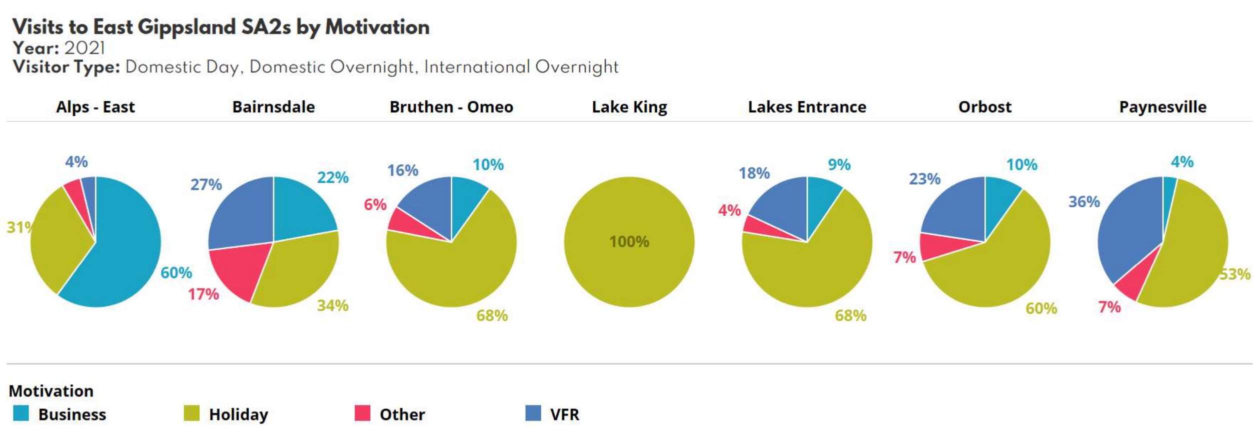
Figure 29: Visits to East Gippsland SA2s by Visitor Type (2021)[31]



+ Visitation by Motivation

Figure 30 illustrates visitation to each SA2 by motivation for travel. Holidaying is the predominant motivation for visitation across most of the SA2s – particularly in Lake King (comprising 100% of travel), Bruthen – Omeo (68%), Lakes Entrance (68%) and Orbost (60%). Alps – East SA2, however, generates stronger visitation by those on business (60%).

Figure 30: Visits to East Gippsland SA2s by Motivation (2021)[32]

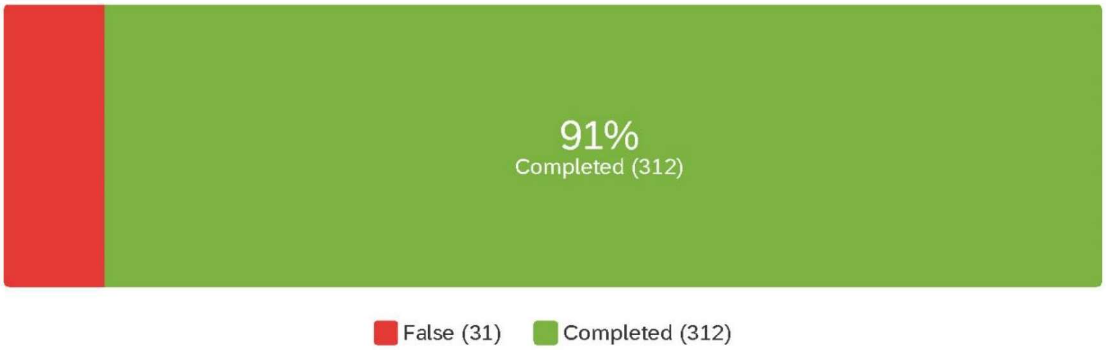


[31] TRA, compiled by Stafford
[32] TRA, compiled by Stafford

Appendix 2 Deloitte Regional Visitor Survey Findings

Survey response demographics

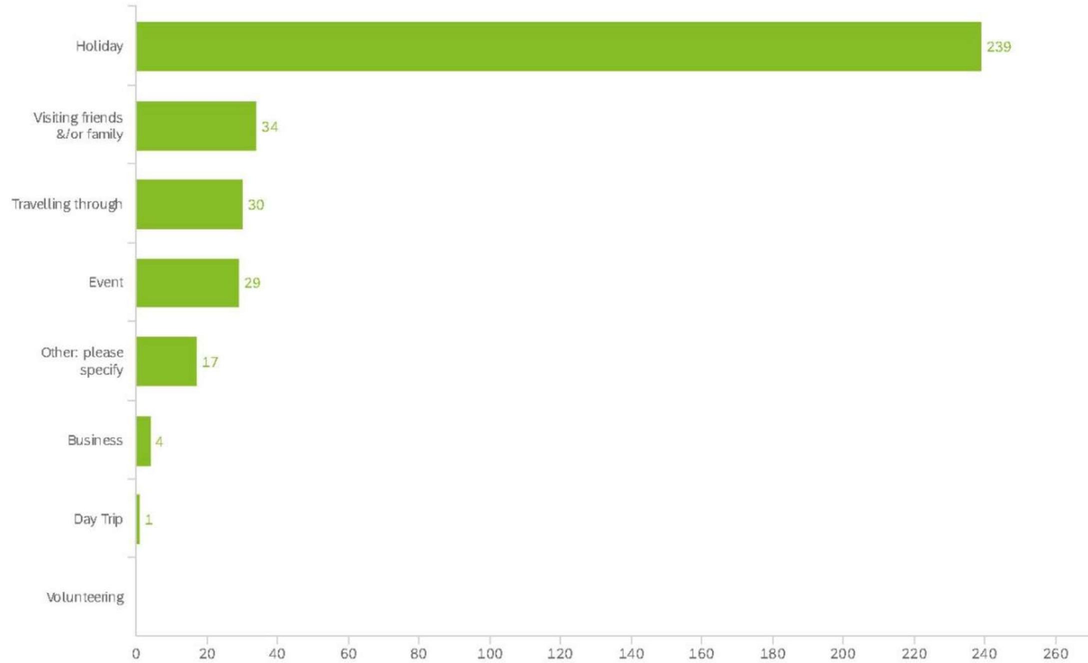
Response Rate



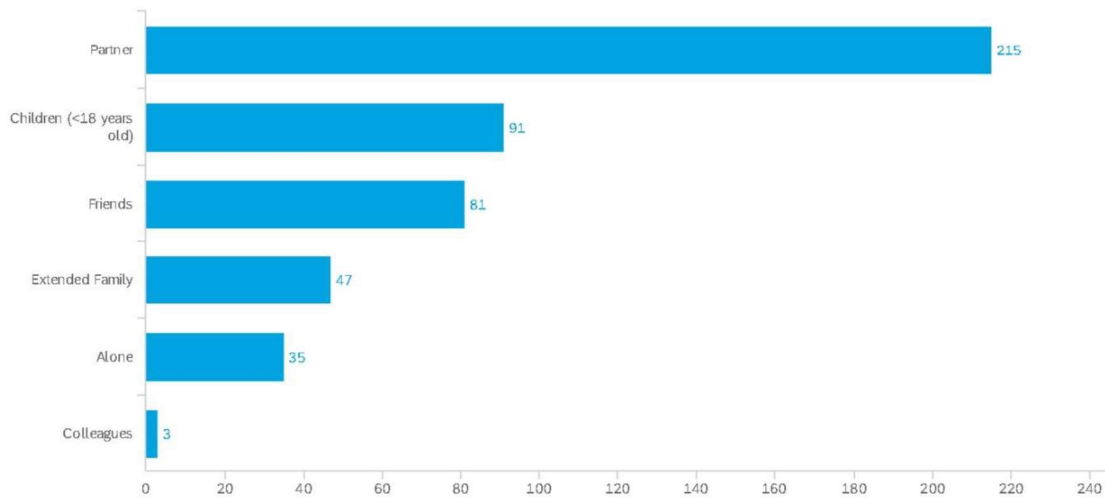
This Visit

Where have respondents travelled from - postcode of Primary Residence (9999 - For Overseas)

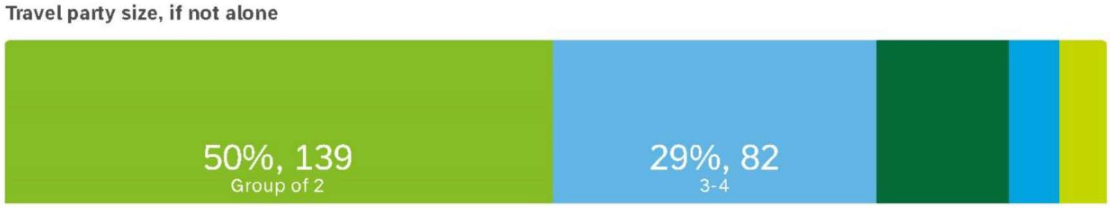
If travelled from overseas - which Country

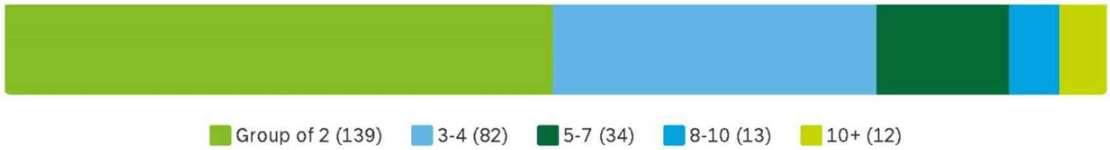


Who did you travel with?

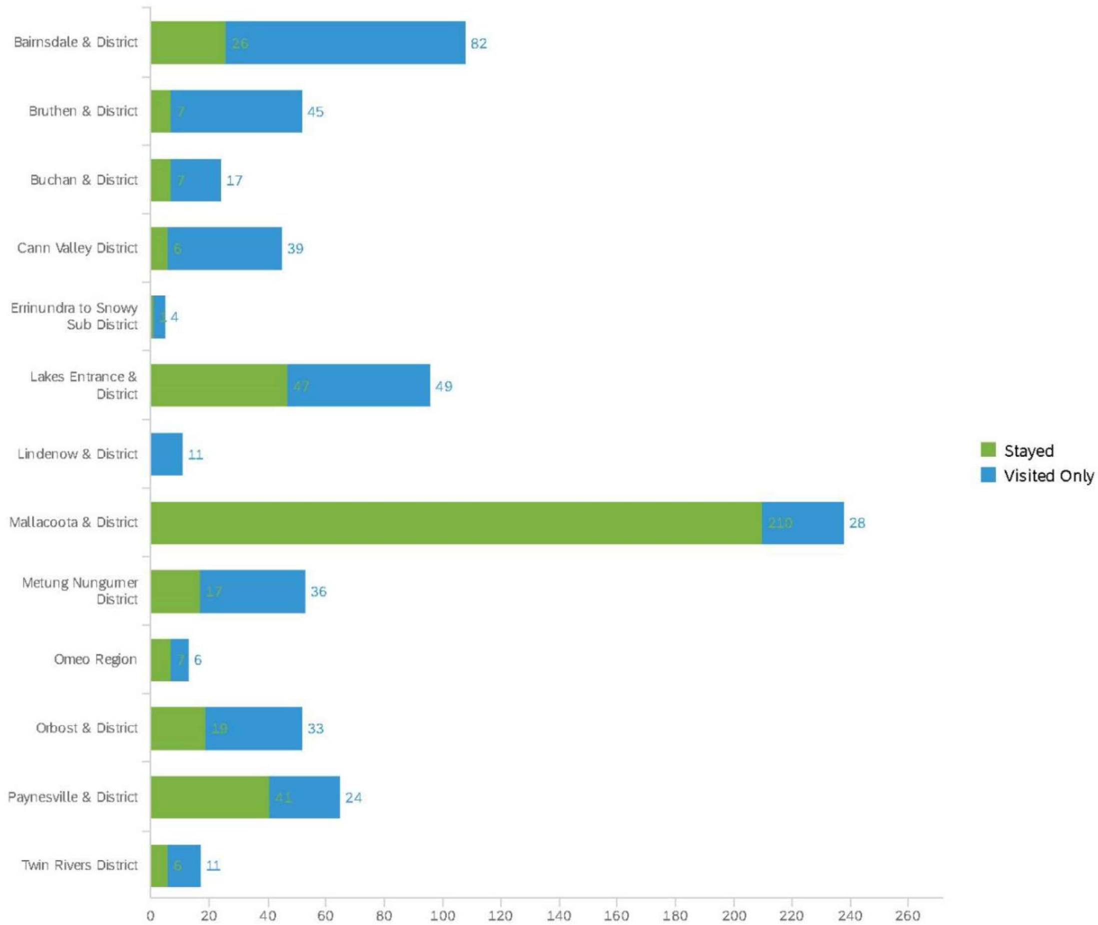


Travel party size, if not alone



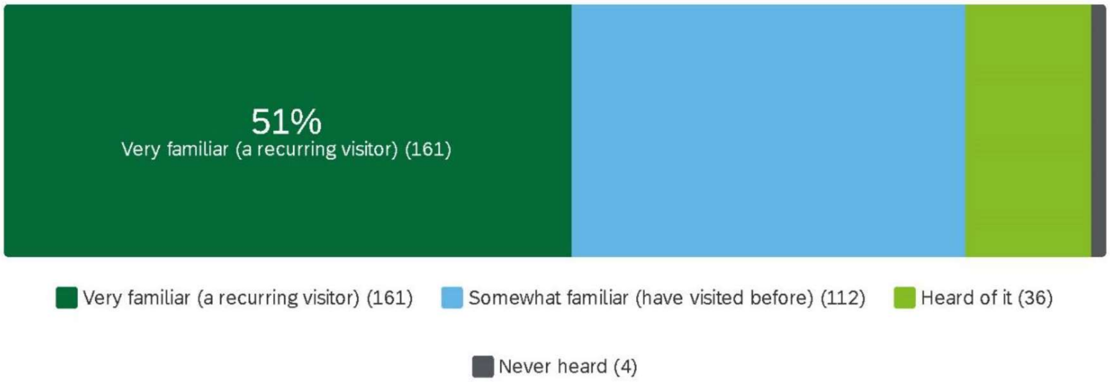


District breakdown - Stayed or Visited Only

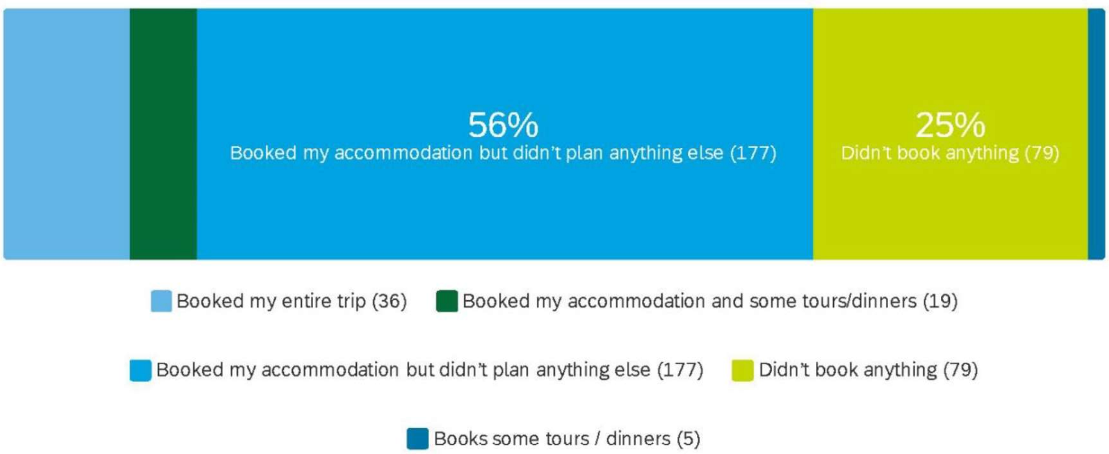


Itinerary

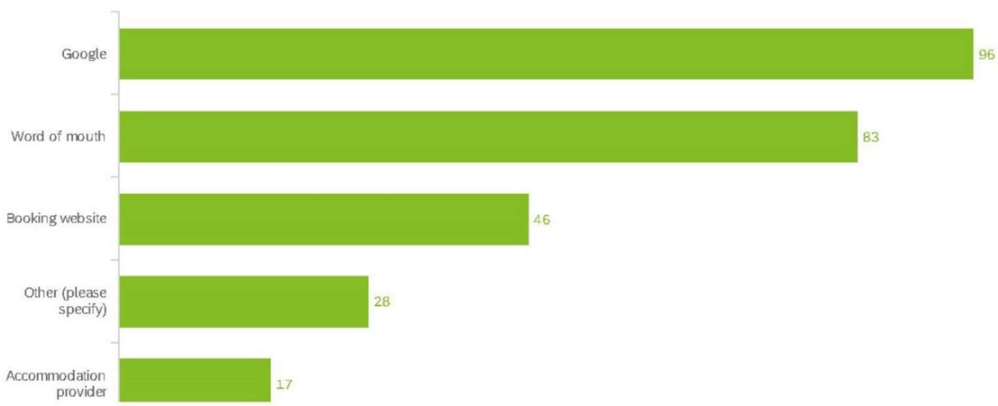
How much did visitors know about East Gippsland before their trip.



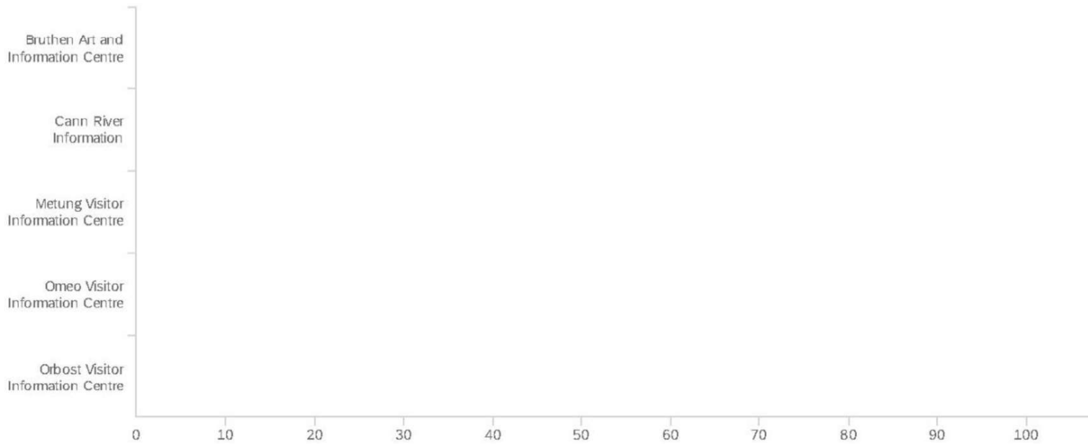
How much planning did visitors do prior to their trip.



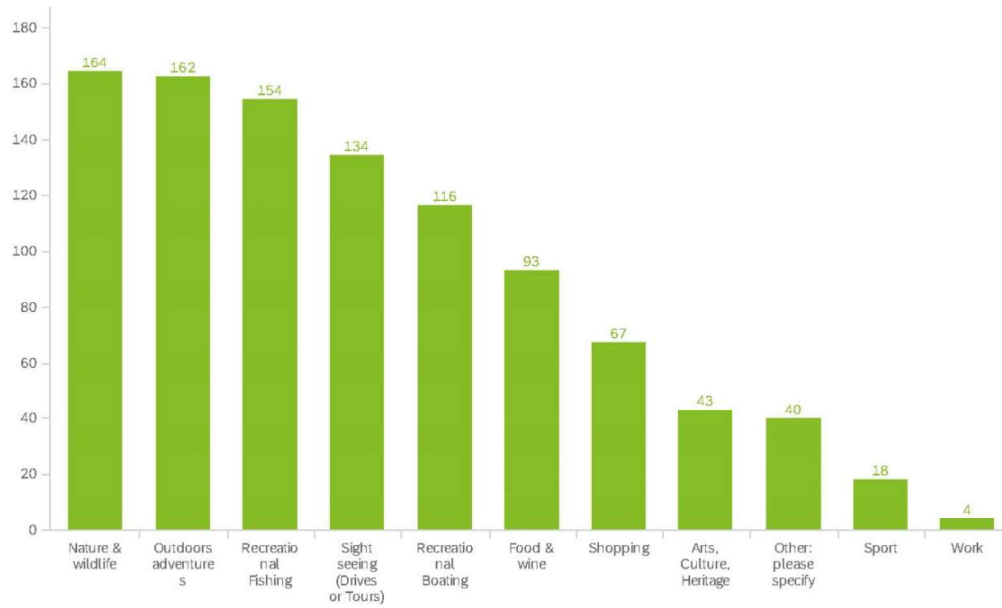
Where did visitors source information about their trip?




Social Media
17
Visitmallacoota.com.au
12
Mallacoota Visitor Information Centre
10
Visiteastgippsland.com.au
7
News article (print, radio, online)
4
Trip Advisor
4
Lakes Entrance Visitor Information Centre
3
Tourism newsletter (eg. Broadsheet)
1
Visitgippsland.com.au
1
LakesEntrance.com
1
Bairnsdale Visitor Information Centre
1
Bemmriver.org.au
Buchan.vic.au
Metung.com
Omeoregion.com.au
Orbostregion.com.au
Visitpaynesville.com.au
Twinrivers.com.au

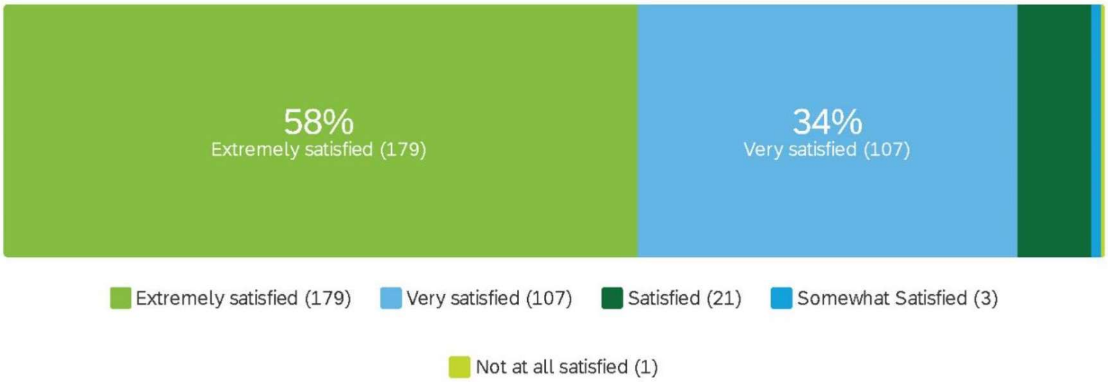


What were the main activities visitors did on their trip.



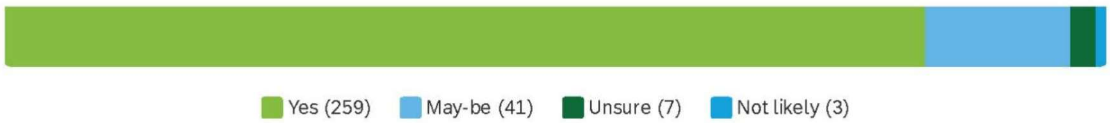
Next Visit

Overall visitor satisfaction with the East Gippsland Region.

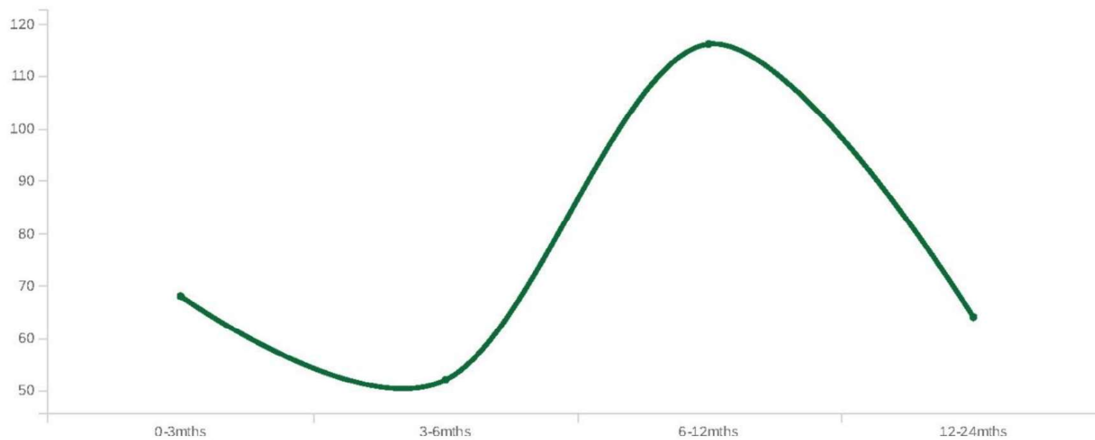


Describe your trip in East Gippsland.

Are visitors likely to come back to East Gippsland soon?



When are visitors likely to return to East Gippsland.



Visitor Consumer Profile

On their trip, how much did visitors spend per day:

Field	Minimum	Maximum	Mean	Count
On Travel	0	1500	129	246

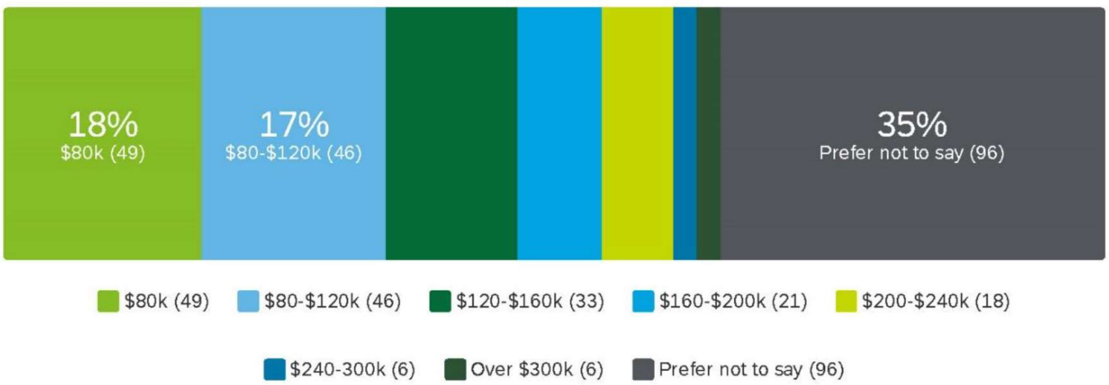
Field	Minimum	Maximum	Mean	Count
On Accommodation	0	8000	219	262

Field	Minimum	Maximum	Mean	Count
On Food & Beverage	0	10000	232	261

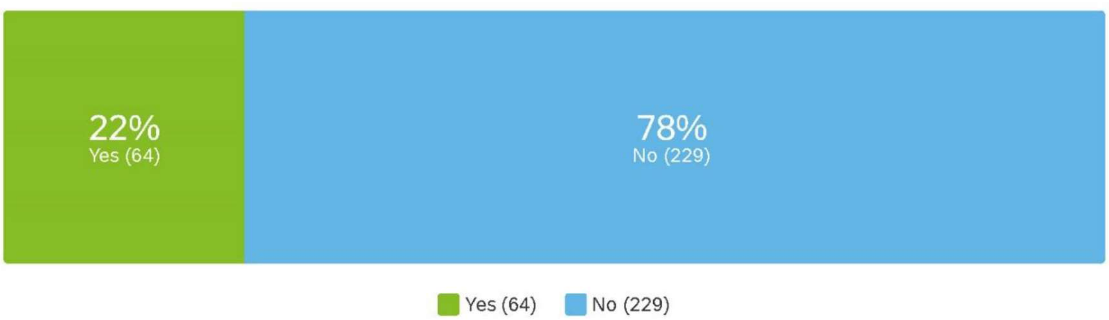
Field	Minimum	Maximum	Mean	Count

Field	Minimum	Maximum	Mean	Count
On Attractions / Activities	0	1500	73	223

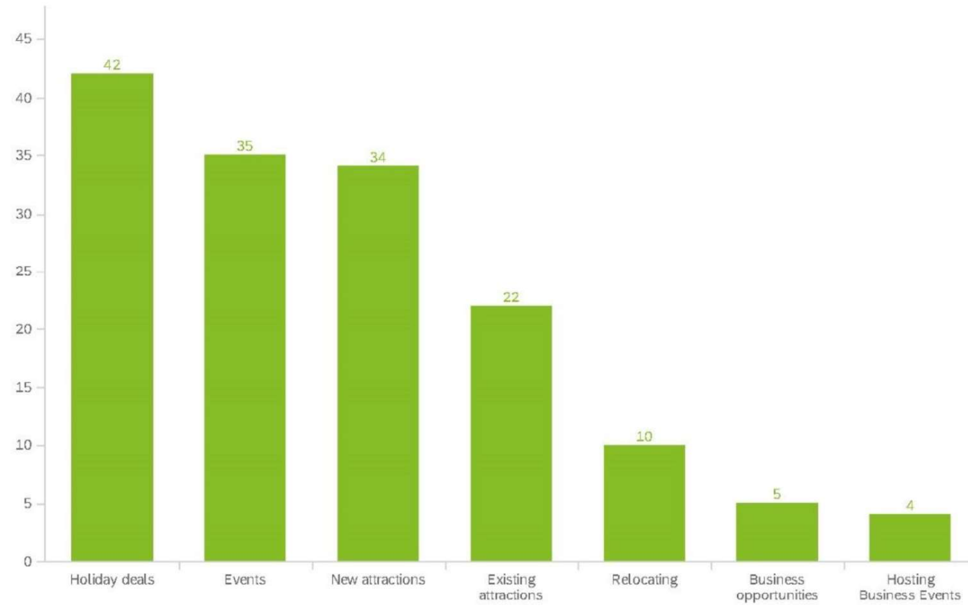
Respondents' current annual household income, before tax.



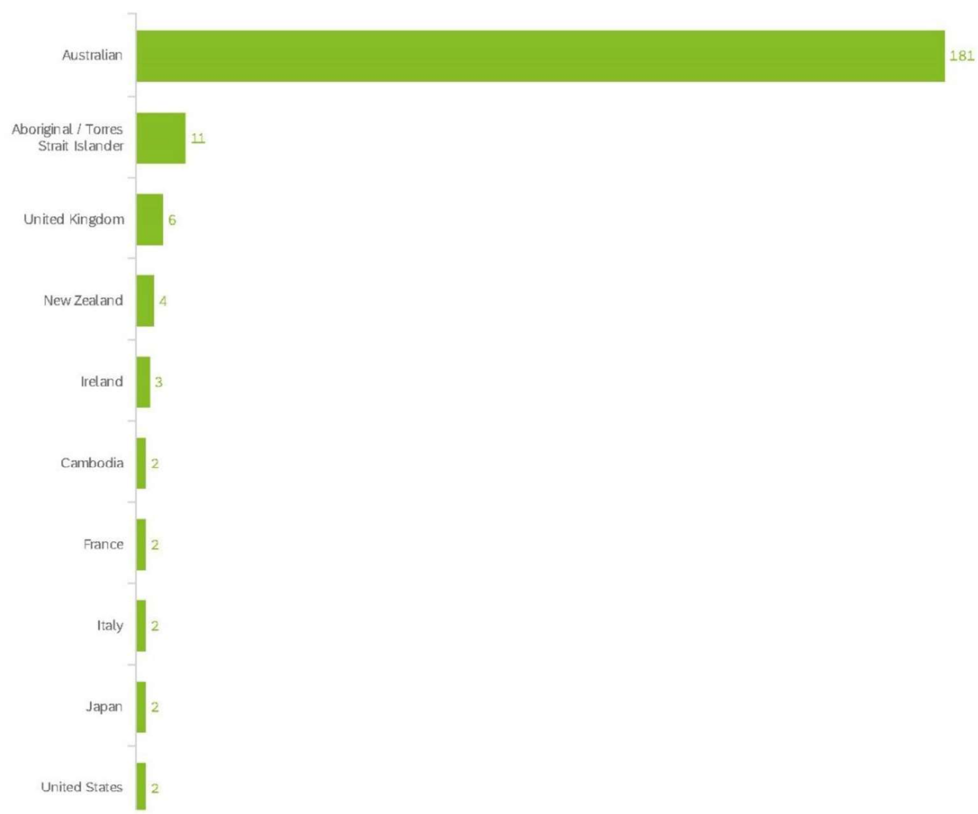
Would visitors like to keep in touch with East Gippsland?



Additional information sought on...



Visitors' Cultural Background




Afghanistan 1
Argentina 1
Canada 1
China 1
Congo, The Democratic Republic of 1
Denmark 1
Egypt 1
Germany 1
Greece 1
Malta 1
Mauritius 1
Mexico 1
Nepal 1
Netherlands 1
South Africa 1
Sri Lanka 1
Thailand 1
Aland Islands