

**Pre-Feasibility Study to develop
a High-Country Equine and Brumby
Tourism in the East Gippsland
Shire, Victoria, 2 June 2025**



DIAGNOSIS & PLANNING • PRODUCT DEVELOPMENT • FEASIBILITY STUDIES

Authorship

Prepared by SMA Tourism, Website: www.smatourism.com, Email: info@smatourism.com

SMA is an international tourism consulting firm specialising in innovative product development, feasibility assessments and business cases for cultural tourism, ecotourism, adventure tourism and culinary (food and wine) tourism.

The team contributing to this Report were:



Simon McArthur
Stakeholder
consultation, field
research and author



Jane McArthur
Product research and
market testing

Disclaimer

Specific investment decisions addressing recommendations in this report require further planning, engineering, environmental and heritage advice, and costing by an estimator. Any costings should not be used for construction.

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Acknowledgement of country

We acknowledge the traditional custodians of the lands and waterways that make up the region in which this project is based, the Gunaikurnai. The diverse First Nations people from this region have been caring for country and welcoming visitors for tens of thousands of years before us and still do to this day. We pay respects to past and current Elders and acknowledge the significant contribution made by First Nations people to our visitor economy.

Project acknowledgements

The team would like to acknowledge the guidance of Prue McTaggart and the many stakeholders that contributed their time and thoughts towards this project.

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Definitions

Aboriginal tourism: an interpretation of the wider concept of Indigenous tourism (see below) that involves tourism interpreting Aboriginal cultures and stories.

Brand: source of a distinctive promise for customers from a product, service or place. Everything the lead organisation does in collaboration with its partners and community should be orientated around delivering and constantly enhancing the promise. Not just a logo.

Business case: informs an investment decision of the Government by providing analysis of options, costs, benefits and risks associated with addressing an identified problem. The business case for larger projects typically follows a feasibility assessment.

Cost Benefit Analysis: compares different options by valuing each option in terms of its net benefit to society. It is an important tool when making resource allocation decisions where choices should be made between alternative uses of finite funds.

Cost estimation: the process for determining the costs associated with undertaking an investment proposal.

Experience: The emotions, feelings and sensations generated by the people met, places visited, activities participated in and memories created by travel, through watching, testing, smelling, touching, listening and being part of a culture or lifestyle that is distinctly different from the visitor's everyday life and that reaches an individual's deep needs and desires. An experience is not a product (which is the simpler / stripped back / commercialisation of an experience).

Feasibility assessment: the development of options that could help address a stated problem, which are assessed against criteria reflected a desired outcome to determine the optimum choice to implement.

FTE: Full Time Equivalent employee / contractor, which can be made up of a greater number of part time and casual employees

Indigenous tourism is generally regarded as tourism specifically to interpret Indigenous cultures and stories, but it can also include any of the following attributes: Indigenous people directly operating or investing in tourism operations; business partnerships between

Indigenous organisations and tourism operators; Indigenous people employed in tourism operations; mainstream tourism incorporating Indigenous culture and stories to enhance their programs; and Indigenous input into the way tourism is managed.

Interpretation: an experience that enriches our lives through engaging emotions, enhancing experiences and deepening the understanding of places, people, events and objects from the past and present. Interpretation communicates ideas, information and knowledge in a way which helps people to make sense of their environment.

Investment lifecycle: the phases of investment from acquisition or creation, through management to exit by the funder.

Local Government Area: An LGA included in the ASGC LGA Structure is a spatial unit which represents the whole geographical area of responsibility of an incorporated Local Government Council. An LGA consists of one or more statistical local area level 2's (SLAs).

Marketing: the management process through which goods and services move from concept to the customer. It includes the coordination of four elements called the 4 P's of marketing: identification, selection and development of a product ; determination of its price; selection of a distribution channel to reach the customer's place, and development and implementation of a promotional strategy.

Operator: an individual or organisation that conducts a tourism activity which results in some degree of commercial return.

Product: a good or service (tangible or intangible) that an organisation offers to customers.

Risk: defined in ISO31000:2018 Risk Management as 'the effect of uncertainty on objectives'. An effect is a deviation from the expected outcome — positive or negative. Risk is often expressed as a combination of the consequences of an event and the associated likelihood of occurrence.

Target market: the portion of actual and potential visitors that an organisation most wants to attract to their destination or product. The target market is chosen because the needs of the market segments chosen most naturally fit what the destination or product can offer and offer the best return on any marketing investment to attract them.

Visitor (local): a person who comes from their home that is within 25kms.

Visitor (day tripper): a person who comes to a destination from outside 25kms, spends at least four hours, leaves in the same day and whose travel is not for regular work or study.

Visitor (overnight): a person who comes to a destination from outside the immediate local area and stays overnight within the same immediate local area.

Yield - The expenditure injections of tourists (sales revenues) or alternatively/differently the profitability of catering to different visitor markets. Yield can be defined purely from an accounting perspective (sales revenues per visitor) or the financial rate of return to operators, or gross operating surplus of different industry sectors. Alternatively, the profitability to the tourism industry of different market segments can be assessed.

Executive Summary

The aim of this project was to explore the concept and assess the feasibility of developing a nature-based equine tourism experience centred around brumbies in the East Gippsland Alpine High Country. This report considered five potential experiences from which to conduct a pre-feasibility assessment:

1. Brumby wing of a nature-based tourism, conservation, and education centre
2. Equine wellness and therapy centre (with accommodation)
3. Equine brumby training facility (with accommodation)
4. Guided brumby spotting / tracking (utilising Swift Creek or Dinner Plain accommodation)
5. Mountain Cattlemen and Brumby immersion

Each of these proposals was scoped with the benefit of researching similar products conducted in regional Australia, then market tested with 299 Melbourne residents that had undertaken a nature-based activity in the past three years. A portion of this sample identified as having undertaken horse riding, and this sample was compared to the overall sample. In addition, 19 horse focussed participants (regularly involved in horse riding or related horse activity) were sampled to contrast with the rest of the sample.

The market testing identified quite a high proportion of respondents that had experienced some form of horse riding in the past. The market testing found relatively high and consistent appeal for all five products, as measured by their likelihood to influence an overnight stay in the region to undertake the activity. Table ES.1 shows a summary of these results and contrasts nature tourism respondents with those in the sample that had undertaken horse riding. Perhaps unsurprising, horse-riding nature-based respondents found the proposals more appealing and were more likely to undertake them and stay overnight in the region as a result.

There was the strong interest in camping over other forms of hard roofed accommodation as part of all five experiences. This suggests that these businesses could start with the more cost-effective camping, and add authentic hard roofed accommodation later, if the business could then afford / justify it (excluding cattlemen and brumby immersion). This reduces the cost barrier to establish the businesses.

Table ES.1 Strength to influence respondents to participate in the experience and stay overnight in the region

Product	All nature-based respondents (299)	Horse riding nature-based respondents (180)	Preferred accommodation of all nature-based respondents
Mountain cattlemen and brumby immersion	62%	67%	Camping
Guided brumby spotting / tracking	59%	70%	Camping
Brumby wing of a nature-based tourism, conservation and education centre	54%	65%	Camping
Equine brumby training facility (with accommodation)	54%	65%	Camping
Equine wellness and therapy centre (with accommodation)	51%	54%	Camping

This work has been worked through with approximately 20 local stakeholders interested in developing equine and / or brumby tourism via two workshops and visits to various sites across the region. Existing equine experiences identified in this report were:

1. Lancasters Horse Rides
2. Three events: Swifts Creek Picnic Races, Omeo Rodeo and Dinner Plain Horse Polo

The annual equine events are run in peak visitation periods like Easter, when such a stimulus is not required. It would make sense to separate the event timing and place them on long weekends rather than major holiday periods.

Two supporting accommodation and food and beverage services located in rural or natural settings matching the equine tourism setting are the: Anglers Rest accommodation and pub / restaurant (Blue Duck) and The Willows accommodation. In addition, there is significant accommodation room stock in Omeo largely supplied by pubs.

Two equine-related pipeline projects have been identified in the region:

3. Eco accommodation (High Country Adventure Tours)
4. Laster Horse Rides overnight horse ride and camping

Six concepts have also been identified:

5. Bindi Brumby Equine Assisted Therapy Sanctuary
6. Wild Horse Tours, Nunniong
7. High Country Cup, Nunniong
8. Horse and native wildlife viewing
9. Livingstone River horse riding
10. Omeo Pub brumby and cattlemen tales

It can be concluded that equine tourism in the region is feasible, due to strong market demand, preparedness to travel significant distances and unusually low expectations for hard roofed accommodation. Even if just one third of the pipeline and concepted product was created, then the region would have a critical mass of product sufficient to position it as having an equine tourism product pillar.

The recently constructed mountain bike park in Omeo is attracting visitors and is strengthening occupancy in the Omeo accommodation sector. It is reasonable to assume that much of this market could be interested in adding an equine and even a brumby tourism experience to their stay. Similarly, the use of Omeo during the ski season as a satellite accommodation hub brings a second market that will look for half day perhaps day equine and brumby experiences when the skiing weather is poor, the road access is closed or the skiers' need some recovery time.

As equine tourism is developed, there may be a challenge to provide sufficient authentic accommodation that 'fits' the equine rural and natural settings. There is very little 'short stay' accommodation in Swifts Creek. Accommodation in Omeo is heavily booked in winter by the ski market transiting to the nearby ski fields. Occupancy throughout the year is likely to lift as a result of the recently constructed mountain bike park in Omeo attracting more visitors.

1. Background

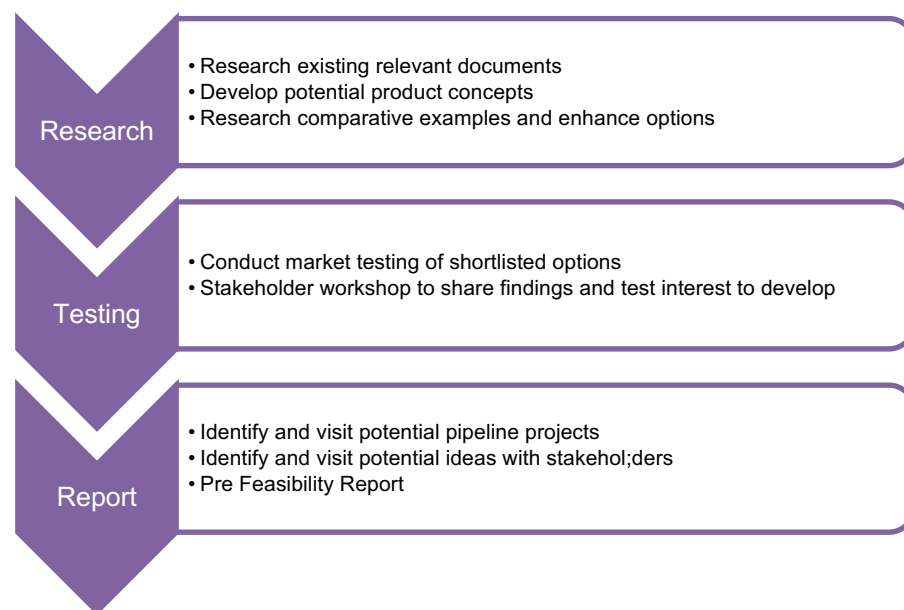
1.1 Project aim

The aim of this project is to explore the concept and assess the feasibility of developing a nature-based equine tourism experiences, especially some centred around brumbies in the East Gippsland Alpine High Country.

1.2 Project approach

Figure 1.2.1 summarises the approach used for this project. Further detail on the approach used for the market testing can be found in **Attachment A**.

Figure 1.2.1 The approach used for this project



1.3 This report

This report applies to the geographic area presented in **Figure 1.3.1**. The first part of this report outlines concepts for five shortlisted options:

1. Brumby wing of a nature-based tourism, conservation, and education centre
2. Equine wellness and therapy centre (with accommodation)
3. Equine brumby training facility (with accommodation)
4. Guided brumby spotting / tracking (utilising Swift Creek or Dinner Plain accommodation)
5. Mountain Cattlemen and Brumby immersion

For each of these concepts, this report determines their pre-feasibility from three dimensions:

1. Comparative market demand – using online market testing to compare appeal, influence to travel to the region and to stay overnight
2. Potential supply – asking the local community if there is anyone that might be interested in developing and operating any of the ventures
3. Wider feasibility – reflecting on the success of similar ventures

Each section of this report addresses each concept in turn, describing the concepts, referencing similar examples in the market, reporting on market demand and supply and reflecting on overall feasibility.

The second and final section of this report identifies pipeline projects (in progress) and idea concepts (no planning to date) for expanding equine and especially brumby tourism in East Gippsland, with a focus on the area south of Dinner Plain to Swifts Creek west to Anglers Rest and East to Nunniong. The conclusion relates to how feasible developing a nature-based equine tourism experience and some centred around brumbies in the East Gippsland Alpine High Country.

This report has been funded by the East Gippsland Shire Council to assist stakeholders understand the opportunities. While Council will continue to assist through providing relevant information, contacts and some guidance, it is the role of stakeholders to take proposals forward.

Figure 1.3.1 Area that this report has focussed on



2. Brumby wing of a nature-based tourism, conservation, and education centre

2.1 The concept

The Swifts Creek Future Regional Context Analysis identified a recurring theme from stakeholder consultation that there was a dearth of historical and cultural knowledge. The report recognised the opportunity to create a multi-functional tourism centre. This centre would have an interactive space designed to encompass and showcase the district's rich history, both in terms of industry and culture, as well as its art. The report further proposed that the centre could include a much-needed community space, noting that the existing gallery was too small and could not expand, so further investigation is needed to identify whether there are any existing buildings to accommodate the concept or whether a green field site for a new building was required.

The centre could feature interactive displays, virtual reality experiences, a theatre for a cinematic experience or a theatrette for re-enactments, a workshop room to learn bushcraft, a café and gift shop. The centre could be positioned and priced to have:

- budget to modest investment, with free entry and free access to all experiences, with major subsidisation from Council on the basis that it increases length of stay and spend in the local area;
- modest investment with free entry with some chargeable experiences, with moderate subsidisation by Council on the basis that it increases length of stay and spend in the local area; and
- modest to significant investment with chargeable entry with free experiences thereafter, with moderate subsidisation by Council on the basis that it increases length of stay and spend in the local area

Inspirational similar products

Australian Stockman's Hall of Fame, Longreach, far NW Qld

The centre features:

- themed galleries providing displays depicting a different part of pioneering history, some interactives (see **Figure 2.1.1**) and featuring an interactive, choose-your-own-adventure-style experience using headsets and smart devices;
- twenty minute cinematic experience showcasing virtual and real footage across a 16mm screen (see **Figure 2.1.1**); and
- live show of stockman rounding up livestock and interpreting their connection to the land and their livestock, accompanied by live bush poetry and music; and
- a café and a bar serving the Centre's own brewed beer.

The attraction was built in 1988 to 2,500m² footprint and reinvigorated in 2021 with a \$15M refurbishment. It is run by a Board and supported by corporate sponsorship. Located in Longreach, far north-western Queensland, this attraction attracts a high proportion of passing trade associated with the Landsborough Highway but does not attract visitors to the region on its own. There is a limit to the number of visitors at any one time and advance bookings are critical to avoid missing out during school holidays. There is a dominance of grey nomad visitation, and this market is less impressed with the refurbishment, preferring the static display version of old.

Table 2.1.1 Packaged pricing for the Australian Stockman's Hall of Fame

Customer type	Entry to Galleries & Unsung Heroes Gallery	Entry to Galleries, The Stockman's Live Show, Cinematic Experience, & Unsung Heroes Gallery
Adults	\$40	\$99
Concession*	\$36	\$89
Child (5-12 yo)	\$25	\$50
Child (under 5 yo)	FREE	FREE
Family*	\$100	\$270

Figure 2.1.1 Gallery experiences at the Stockman's Hall of Fame



Figure 2.1.2 Cinematic experiences and live show at the Stockman's Hall of Fame



Slim Dusty Centre in Kempsey

The initial impetus for the construction of a museum highlighting the career of Slim Dusty came from the Macleay business community. In 2001 the Slim Dusty Museum Trust fund was incorporated and fund raising over ten years included the Federal and NSW State government as well many benefactors and public donations. The concept morphed from a showcase for Slim Dusty memorabilia to include civic and cultural functions.

Construction of the building was completed in 2011, but it took another four years to raise sufficient funds to fit it out and open the centre in 2015. During the COVID epidemic the Centre went bankrupt and in 2022 the Slim Dusty Foundation passed the Centre onto the Kempsey Shire Council. The Foundation continues as a fund raiser, but the Centre is operated and underwritten by the Kempsey Shire Council.

The Centre features:

- the Slim Dusty Museum, featuring a lot of memorabilia and static displays;
- the Nulla Nulla Regional Gallery, displaying works from local artists, travelling exhibitions and a range of different creative mediums;
- a Visitors' Information Centre;
- gift shop and cafe; and
- venue hire facilities.

A ticket for the Slim Dusty Museum includes an all-day pass and an introduction by staff.

Figure 2.1.3 Inside the Slim Dusty Centre



Table 2.2 Entry pricing for the Slim Dusty Centre

Customer	Name
Adult	\$23.50
Concession	\$18.50
Child (5+)	\$9.50
Family (2 adults, 2 children)	\$54.50
Group (15+)	\$16.50

Proposal for market testing

A visitor centre about the high country with a special wing to talk about the high country brumbies. This could include interactive displays, virtual reality experiences, a theatre for a cinematic experience or a theatrette for re-enactments, a workshop room to learn bushcraft



2.2 Market demand

Product appeal

Attachment A explains the market testing that was undertaken for this and the other four products, including a respondent profile.

Some 54% (161) of nature-based respondents tested through Pollfish stated that this experience “makes me want to travel to East Gippsland and stay overnight in the region”. This is considered a good score, 60% or more is considered outstanding. Within this sample, those that had undertaken some type of horse riding found the proposal even more appealing.

Table 2.2.1 Market response to Brumby wing of a nature-based tourism, conservation, and education centre

Brumby wing of a nature-based tourism, conservation, and education centre	All nature-based respondents (299)	Horse riding nature-based respondents (180)
Makes me want to travel to East Gippsland and stay overnight in the region	54%	65%
Makes me want to travel to East Gippsland, but NOT stay in the region overnight	15%	18%
I would do it but only if I was in the area	16%	8%
I am indifferent to the experience, could be swayed either way	7%	4%
I have no interest at all in participating in this experience	8%	4%

Horse-focussed respondents tested through Survey Monkey found the product even more appealing again, with 14 of 18 of respondents saying this experience “makes me want to travel to East Gippsland and stay overnight in the region”.

Preferred matching accommodation

Accommodation preference among nature-based respondents for this experience was:

- Camping 33% (100)
- Tiny house with bathroom and kitchenette 17% (51)
- Cabin with fully self-contained kitchen and lounge area 17% (52)
- Basic station-like, with shared bathrooms 14% (43)
- Basic station-like, with ensuites 13% (40)

Accommodation preference of the horse-focussed respondents for this experience was:

- Basic station-like, with shared bathrooms 12
- Camping 5
- Basic station-like, with ensuites 4
- Cabin with fully self-contained kitchen and lounge area 4
- Tiny house with bathroom and kitchenette 2

2.3 Potential local supply

There were no stakeholders immediately suggesting a site to develop this centre.

The Omeo Historic Park and Museum (former lawcourts) was visited to consider whether it could accommodate an equine wing within the building. The heritage listed building is owned by Council and has been recently conserved. The museum operation is run by the Omeo Historic Society. The building footprint is small and its role as a museum is limited by small rooms rather than a larger exhibition space. Consequently, space for interpretive displays is limited and all of the space appears occupied by the rich range of pre-existing historic themes associated with Omeo. There isn't enough space to do justice to the brumby story and to add a brumby wing would reduce the Omeo content. The building is therefore not considered suitable for the proposed use.

The ideal location for this product would be associated with a venue to see and interact with brumbies, such as a brumby training facility or the rendezvous for brumby spotting tours and Mountain Cattlemen and Brumby immersion experience. In this situation, the building could be a rustic shed with a ticketing / reception desk, displays and amenities inside. The centre could be justified on several fronts:

- providing an introductory experience for arriving customers while they await the product they have chosen to start;
- being part of a ticketing / reception area that needs to be staffed anyway, and thereby not adding significant additional costs; and
- helping to promote the other brumby tourism products in the region, building an integrated suite of opportunities and perhaps getting support from the other operators receiving subsequent bookings.

One option might be just outside of Omeo. Jake Greaves, the owner of the tourism business Howling Huskies, has property just out of Omeo that could be utilised as a small wildlife viewing facility that included some brumbies. Being so close to Omeo would help access its existing and growing visitor market. A modest facility like the one described above could be established at this site. This opportunity is at idea stage and no planning has been undertaken. External funding would need to be procured to develop the centre as part of the wider wildlife facility.

2.4 Wider feasibility

Expensive to build

Interpretation and Cultural Visitor Centres are expensive to build. New builds, including their fitout ready for operation, cost between \$20M and \$30M, excluding land purchase and any site remediation. Building adaptations will still cost \$10 to \$20M to make the building compliant for use.

Accessing this amount of funding in the current economic climate will be a major challenge from all levels of government. Local governments are increasingly reluctant to provide the seed funds and build them because they end up operating and underwriting them – a cost that can be a real burden in smaller Councils.

Challenging to get sufficient trade

Visitor centres need high levels of passing trade. Even those that have this trade have proven very expensive to build and difficult to generate sufficient revenue to cover costs, let alone reinvest in refreshment of the experience (eg. Stockman's Hall of Fame (Longreach) and Slim Dusty Centre in Kempsey).

Centres that attract more visitors tend to have a human dimension for a performance / re-enactment). However, these are costly to operate and cost virtually the same whether there is one customer or a full house. They also need a highly committed local community to deliver them and can over the years exhaust these people and 'run out' of people to deliver it.

Challenging to fund reinvigoration

Most Interpretation and Cultural Visitor Centres don't make enough profit to fund their future reinvigoration / refreshment. Grant providers are less inclined to fund proposals for this work; preferring new projects. Starved of funding for renewal, these centres subsequently become over-mature and their managers have to release the charge because it no longer represents value for money.

Financial failure

Most Interpretation and Cultural Visitor Centres have gone broke at one stage or another.

2.5 Pre-feasibility conclusion

The conventional visitor centre with a brumby wing is probably not feasible to develop or operate in the region, due to the constraints outlined in **Section 2.4**.

The development of this product is therefore contingent on a private sector operator with suitable land proceeding with their immersive product and supporting the centre being built on their property with external funding support.

3. Equine wellness and therapy centre and retreat

3.1 The concept

Pets and many animals more widely have been proven to have a positive impact upon human psychological and human health. Studies have confirmed results that include lowering heart rate and blood pressure, stress, panic attacks and a risk to developing allergies (eg. asthma, allergic rhinoconjunctivitis and eczema). Socially, interactions can assist with self-confidence, socialisation and forming new friendships.

Equine assisted mental health involves the counsellor working with a horse, or a herd of horses, to assist clients in working through their issues and becoming aware of their responses and behaviours. Sessions can provide therapy, support and learning for corporate groups, families, couples, individuals, teens and children. The horses used could be rehomed brumbies.

The benefits of Equine-Assisted Therapy (EAT) include significant benefits for people with mental health challenges and neurodiverse individuals. It helps improve emotional regulation, social skills, physical health, mental health, cognitive functions, self-esteem, and confidence.

Research supports its effectiveness, showing improvements in autism symptoms, reductions in anxiety, depression, and PTSD, and better behaviour and social skills in children and adolescents. Long-term studies also confirm that these benefits are sustained over time.

Overall, EAT is a promising and effective therapy that positively impacts a wide range of challenges.

The concept could be a retreat-based equine wellness and therapy centre, where people could stay and receive the therapy sessions relevant to their needs. The centre could provide several brumbies rehomed from the high country and one or two domesticated horses. Two therapists could between them offer a range of treatments with the horses.

As a second stream, the centre could also provide a service to assist people with some mental and physical disabilities to engage with the horses.

Accommodation would be provided via tiny houses with their own kitchenette and bathrooms.

Facility to facilitate horse riding for people with disabilities.

Inspirational similar products

Brumby Equine Assisted Therapy, Hartley, NSW



Brumby Equine-Assisted Therapy (BEAT)¹ practitioners are professionally trained and qualified in trauma informed and person-centred counselling. They offer equine assisted therapy, room-based therapy or natured based therapy, equine assisted learning, day retreats and art therapy services aimed at helping individuals rebuild resilience and find enjoyment in life.

BEAT apply a wide range of psychological and human developmental principles and methods to address the individual treatment needs and goals of each client. They also incorporate the model, methods, and principles of Equine Assisted Therapy Australia (EATA) to ensure the delivery of competent and compassionate services.

¹ <https://www.brumbyeat.com.au>

BEAT provide individual therapy sessions for children, adolescents, and adults facing mental health challenges. These sessions involve supported experiential learning and activities in a therapeutic context, where horses play an integral role.

The therapeutic treatments focus on cultivating safe relationships, attunement, emotional regulation, emotional knowledge, psycho-education, and developing competencies in boundaries and non-verbal communication.

Brumby Equine-Assisted Therapy is a registered NDIS provider and can be included in your National Disability Insurance Scheme (NDIS) funding plan.

There are no fees shown on the website or any details on how to book their services, other than a contact email.

The business is a small operation with a single operator and one full working brumby and two others in training.

Wisdom of the Brumby, Rocksberg, Queensland

Wisdom of the Brumby's mission is to weave the wisdom of the Australian wild brumbies with the principles of Gestalt therapy in order to create a space for personal growth, healing, and self-discovery.

Wisdom of the Brumby embraces the principles of Gestalt therapy, which views healing as an organismic process that occurs in the present moment. Their approach focuses on the here and now, helping individuals become fully aware of their current experiences and emotions.

They operate within a relational field, recognising that our experiences are deeply interconnected with our environment. The brumbies, with their vibrant and energetic presence, co-facilitate sessions, providing a dynamic and natural setting for exploration and integration.

The Liberated Brumby Training and Skills Workshop is a one-on-one or group session offering an opportunity to learn gentle, consent-based training techniques while working closely with brumbies. Participants will gain insights into herd dynamics, the importance of presence, and self-regulation.

Other services provided by Wisdom of the Brumby are one hour sessions of Equine Assisted Learning at \$165 per session, Introductory Handling and Training and consent-based training with brumbies \$100 per person, Nutrition and Wellbeing \$100 per person and Equine Assisted Psychotherapy (EAP) at \$200 per session. There is an online booking system for these products.

<https://www.wisdomofthebrumby.com.au/book-online>

Proposal for market testing

A retreat delivering equine assisted therapy for people seeking assistance with mental health, and for people with some mental or physical disability interested in connecting with or even riding high country brumbies or domestic horses.



3.3 Market demand

Product appeal

Attachment A explains the market testing that was undertaken for this and the other four products, including a respondent profile.

Some 51% (153) of nature-based respondents tested through Pollfish stated that this experience “makes me want to travel to East Gippsland and stay overnight in the region”. This is considered a reasonable score, 60% or more is considered outstanding. Within this sample, those that had undertaken some type of horse riding found the proposal even more appealing.

Table 3.3.1 Market response to an equine wellness and therapy centre and retreat

Equine wellness and therapy centre and retreat	All nature-based respondents (299)	Horse riding nature-based respondents (180)
Makes me want to travel to East Gippsland and stay overnight in the region	51%	54%
Makes me want to travel to East Gippsland, but NOT stay in the region overnight	18%	24%
I would do it but only if I was in the area	12%	8%
I am indifferent to the experience, could be swayed either way	13%	12%
I have no interest at all in participating in this experience	6%	2%

Horse-focussed respondents tested through Survey Monkey found the product even more appealing with 14 of 18 of respondents saying this experience “makes me want to travel to East Gippsland and stay overnight in the region”.

Preferred matching accommodation

Accommodation preference among nature-based respondents for this experience was fairly evenly spread, with slightly more choosing camping:

- Camping 26% (77)
- Cabin with fully self-contained kitchen and lounge area 19% (57)
- Tiny house with bathroom and kitchenette 18% (55)
- Basic station-like, with ensuites 17% (51)
- Basic station-like, with shared bathrooms 14% (42)

Accommodation preference of the horse-focussed respondents for this experience was:

- Cabin with fully self-contained kitchen and lounge area 5
- Basic station-like, with ensuites 4
- Basic station-like, with shared bathrooms 3
- Tiny house with bathroom and kitchenette 3
- Camping 1

3.3 Potential local supply

There is currently no product on offer in the region, but one pipeline and two concepts were identified as potential local supply.

The pipeline project is being developed by Buckley High Country Adventures (Sonia Buckley) 20 minutes north of Benambra (off Tablelands Road) on a 42ha private property that features extensive mountain views and Mitta Mitta riverfront. The property also has a horse yard, horse and brumby on the property. The proposal involves developing:

- a central building providing guest lounge / dining area / meeting area with adjacent bedrooms at either end;
- three cottages;
- self sufficient spring-fed water supply; and
- solar power and environmentally friendly design, materials and construction.

The proposal would subsequently employ live in managers to deliver a high standard of eco-friendly serviced retreat accommodation, supported by a health treatment room and yoga platform, on site angling (trout), river swimming and short walks. The owner has extensive links with operators providing guided horse rides and walks.

There is a vision taking shape at Bindi. Michael Morehead and Jeana Maron take in displaced Nunniong brumbies. Utilising Jeana’s background in healing, the couple seeks to establish the Bindi Brumby Equine Assisted Therapy Sanctuary. The property holds a horse training yard and a one-room rustic cottage for those who come to camp in the energy of sharing stillness, power, healing and belonging.

Brooke from Helping Jessy Animal Myotherapy is also interested in adding to her business an equine wellness and therapy centre and retreat.

(<https://www.facebook.com/HelpingJessyAnimalMyotherapy/>)

3.4 Wider feasibility

Some horse handlers believe that brumbies are not ideal animals for equine therapy, for several reasons.

The Brumby is a social communal animal used to living in a mob and not used to intimate time with a human being outside of the mob. They argue that every minute that a brumby is away from its mob it is away from its natural sense of place and community – this makes it difficult for a brumby to sensitively give.

The brumby capturing and homing process can be stressful for a brumby and leave it emotionally scarred, perhaps forever. This in turn does not logically make the brumby the ideal giver.

Unwell people may not be able to deliver calm and sensitive behaviour. The brumby is a large animal and if disturbed could suddenly move or kick in a way that could hurt the customer and leave them worse off.

3.5 Pre-feasibility conclusion

This proposal has a key constraint but several opportunities that make its pre-feasibility look promising, at least at the simple treatment level.

The key constraint to moving this proposal forward is accessing the expertise needed to deliver therapies. The business could start with simple treatments and gradually add more complex ones requiring greater expertise. Perhaps keen local people could seek some training for the simpler treatments and the business owners could test the feasibility of short-term contracts to acquire additional expertise for more complex treatments.

Though it brings visitors and overnight stays in the local area, this proposal is more a part of the health and wellness sector than the visitor economy. This brings a significant opportunity to access funding outside of the tourism sector. The health sector already has a range of funding programs to support program development and enabling infrastructure. There might even be some past clients of other equine wellness and therapy centres prepared to donate funds to develop this one.

This business is made more feasible through potential distribution channels to access customers. There are veteran programs seeking medium to long term service-providers that help deal with post-traumatic stress – this demand has become clearer since the recent release of the Royal Commission findings. It might also be possible to get the business accredited with the NDIS, which would connect it with people that already have the funding to take up treatments.

4. Equine brumby training facility

4.1 The concept

A training retreat to teach multi-day horsemanship and equestrian skills for different skill levels using rescued and trained high country brumbies.

Additional niche programs could also teach:

- how to train brumbies from wild to domestic and then into a riding partner;
- how to work with cattle;
- fencing and yard building; and
- bush skills.

At night guests could choose evening storytelling about local mountain history culture, and stay in simple station-like accommodation, some with ensuites and some using shared bathrooms.

Inspirational similar products

Snowy Brumby Horsemanship

Located in Dalgety NSW, Snowy Brumby Horsemanship (SBH) trains once wild pure brumbies every day towards a domestic life to be sometimes a riding partner and always a beloved companion. The training includes brumbies straight from the wild, brumbies who have found themselves in need of a second chance and brumbies lovingly owned but needing our training skills for further development.

No onsite accommodation is available.

The Brumby Meet and Greet Tours allows visitors to spend an hour meet a mob of brumbies, pat and spend time with them. Visitors will hear from a team member about brumbies and how they are cared for and what SBH. They will have the opportunity to watch while they are being trained and can walk amongst them in their bushland setting and be photographed. Cost is \$45 per person or \$100 per group with all funds going towards their feed bill. Meet and Greet tours are available Monday to Saturday and require a few days' notice.

The Wild Horse Training Tour offers participants time in the round yards with the brumbies while they are being trained. Participants learn the basics of how they are trained from wild to domestic and then into a riding partner. Tours are offered twice a day and include morning or afternoon tea. Cost \$95 per person and require a few days' notice.



Wild Horse Training Workshops are held over two days. This workshop is a hands-on immersion of 'all things brumby'. It includes round yard time, ground-work, and ride training with SBH's unique wild training methods. It is most suited for those wanting to understand more about training brumbies, those looking to become a brumby guardian and to current owners of brumbies wanting to understand how to help and work with them. Cost \$120 per person for 'on ground' training only and \$250 per person with ride training session.

SBH is also provides the services for a registered not for profit charity that funding help for brumbies in need of help and assistance. This includes taking straight from wild plus also the very important roll or healing those who have had a bad rehoming start.

All donations are 100% tax deductible.

The Brumby Project, Amamoor, Queensland

The Brumby Project (TBP²) was born from a love of wild nature, adventure and *to help* manage Australia's feral horse population, *by creating* one horse-human partnership at a time. TBP conduct camps and clinics ranging in duration and skills to ensure everyone has the opportunity to work with, and own, an Australian Brumby.

The website profiles a 10 day Brumby Camp and a 5 day Handling School on their south eastern Queensland property in Amamoor. It is run by eight staff, the founder and co-owner, 4 instructors, a brumby trapper and a camp coordinator. TBP offers camping sites for self-catered camping. Guides have 30 years of cumulative experience.

The camp provides participants with the opportunity to learn how to take an untouched wild brumby and turn it into a willing, respectful horse. Learning all the necessary groundwork skills and principles to go from first touch to first ride. Cost of Brumby Cap is \$2,750 per person for 10 days including tuition, food for brumbies, ownership of brumby, use of facilities, morning teas and merchandise. Fence sitters/partners \$440 for 10 days or a day rate of \$50. Camp sites are provided for participants to bring their own camping equipment.

Other services provided by TBP are kids camps, horsemanship camps, stock transport, float loading training, private lessons and training and brumby rehoming.

TBP offer an Adopt a Brumby program in partnership with HQ plantations with brumbies available for adoption either through TBP camp program or unhandled for experience and approved homes with suitable facilities.

The Annual Brumby Show and Open Day hosts 18 events, with led classes, ridden classes and just for fun classes.

TBP host a Forest to Fabulous Brumby Challenge. A competition challenging a small number of horse trainers to transform brumbies from 'forest to fabulous' over the course of a year.

TBP also has merchandise and gear for sale on their website as well as subscription to the TBP Training Video Library.

² <https://www.thebrumbyproject.com>

Figure 4.1.1 Training at the Brumby Project, Amamoor



Figure 4.1.2 Group training and storytelling at dinner with an open fire at the Brumby Project, Amamoor



4BP Horses Australia, Toowoomba, Queensland

4BP stands for what they do, which is saving horses, hence 4 Brumby Protection. A family business starting out in Cobar, NSW it moved to a new headquarters setup in Toowoomba, Queensland³. In 2016 4BP started rescuing brumbies that were being removed from Mount Kosciuszko National Park. These wild horses have become part of the 4BP Horse Clinics and the Brumbies 4 Recovery programs.

4BP clinics are a five day experience for participants to be immersed in learning the 4BP training method first hand, using a saved wild horse, or your own horse. Accommodation is provided onsite in a purpose-built house with shared bathroom, kitchen facilities and laundry. The fully catered clinic is \$6,600, the horse is free should you wish to take it home at the end of the clinic. The clinic is run with a maximum of 5 people. It was unclear how many clinics are year are run, however, when conducting this research in early September 2024, then next clinic was being held in January 2025.

4BP also offer a two week traineeship to teach how to train horses with their special technique.

The Brumbies 4 Recovery (B4R) is a not-for-profit funded by donations and government grants which runs Community Wellbeing Clinics and Suicide Prevention programs.

The B4R program teaches life skills through unique horse training methods, this “equine therapy” helps students improve their mental health and wellbeing. It works with Indigenous groups, troubled children, return armed forces veterans and virtually any other community group that comes forward. 4BP are sharing this technique with the world free of charge with those that may not be able to access our 4BP Clinics otherwise so that the horse and human can have a more unified and deeper understanding of one another.

Products available from the website include Training Program DVD's, online training program, lesson and lesson bundles and mental health videos.

³ <https://4bphorses.com/pages/about-us>

Figure 4.1.3 Training at 4BP Horses Australia



Black Mountain Hideaway, Julatten, Queensland

While not brumby focused this business was included because adds a number of training dimensions that reflect horse-based cattle management and bush skills. These elements differentiate the business and add a cultural dimension that help make it more competitive in an otherwise similar market place.

Black Mountain Hideaway have a Cattle and Equestrian Centre. They offer accommodation, horse riding, school camps, jillaroo courses and wildlife viewing.

The two accommodation lodges are fully self-contained, with BBQ, limited kitchen facilities, private bathrooms, and deck for wildlife watching. They also have trail rides, guided bush walks, wildlife and bird spotting and offer Horse Safe accreditation horse riding clinics.

Black Mountain Hideaway offers a five day certificate Jillaroo / Jackaroo program for beginners and experienced riders. While learning general horsemanship participants will also experience Australian farm life. Accommodation is in cabins, bunkhouses or tents and participants will learn:

- Grooming and saddle up horses
- Horse-riding and Natural Horsemanship
- Feeding, maintenance and hoof care
- Work with cattle, (mustering, yarding etc.) incl. whip cracking and lassoing
- Fencing or yard building
- Bush skills
- Tack maintenance and repairs



Proposal for market testing

A training retreat to teach multi-day horsemanship and equestrian skills for different skill levels using rescued and trained high country brumbies. A niche program could also teach how to train brumbies. At night guests could choose evening storytelling about local mountain history culture and stay in simple station-like accommodation with ensuites.



4.2 Market demand

Product appeal

Attachment A explains the market testing that was undertaken for this and the other four products, including a respondent profile.

Some 54% (161) of nature-based respondents tested through Pollfish stated that this experience “makes me want to travel to East Gippsland and stay overnight in the region”. This is considered a good score, 60% or more is considered outstanding. Within this sample, those that had undertaken some type of horse riding found the proposal even more appealing.

Table 4.1 Market response to an equine brumby training facility

Equine brumby training facility	All nature-based respondents (299)	Horse riding nature-based respondents (180)
Makes me want to travel to East Gippsland and stay overnight in the region	53%	66%
Makes me want to travel to East Gippsland, but NOT stay in the region overnight	13%	16%
I would do it but only if I was in the area	15%	9%
I am indifferent to the experience, could be swayed either way	10%	7%
I have no interest at all in participating in this experience	8%	3%

Horse-focussed respondents tested through Survey Monkey found the product even more appealing with 15 of 18 of respondents saying this experience “makes me want to travel to East Gippsland and stay overnight in the region”.

Preferred matching accommodation

Accommodation preference among nature-based respondents for this experience was evenly spread, with a slight preference for camping:

▪ Camping	25% (75)
▪ Tiny house with bathroom and kitchenette	20% (61)
▪ Basic station-like, with ensuites	19% (58)
▪ Cabin with fully self-contained kitchen and lounge area	15% (46)
▪ Basic station-like, with shared bathrooms	14% (44)

Accommodation preference of the horse-focussed respondents for this experience was:

▪ Basic station-like, with ensuites	8
▪ Basic station-like, with shared bathrooms	5
▪ Camping	3
▪ Cabin with fully self-contained kitchen and lounge area	1
▪ Tiny house with bathroom and kitchenette	0

4.3 Potential local supply

Johanna Trevaskis has a proposal written up as a concept that relates to this product. The proposal involves two components:

1. A facility to hold, inspect and transfer brumbies involving:
 - trapping yards in the high country eg. the Nunniong Plains;
 - trucking horses to local livestock holding yards, eg. Ensay cattle yards.
 - vet inspections to identify old, unfit or injured animals to be removed to meat works.
 - allocating sound horses to rehoming; and
 - moving horses extra to retraining needs to meat works.
2. A High-Country Brumby Cup competition involving three levels:
 - professional trainers taking part in a stallion transformation project. Stallions to be gelded at participants' cost;
 - non-professional adults to utilise mares in a similar non-professional style competition; and
 - junior section, where younger stock trained for in-hand competition with outside help from a nominated adult.

Horses that trainers do not want to retain would be auctioned at the conclusion of competition, with proceeds retained by the Brumbies Trust to ensure the future running of competition as well as the protection and management of this natural resource.

The competition could be held in rural high-country areas like Omeo, Benambra, Swifts Creek or Ensay, bringing tourists, education, animal awareness, employment and money to the areas.

Funds from the sale of unfit horses to the pet food trade would go towards recouping the costs of mustering as well as maintaining the high country's natural ecosystem.

There are two leads that combined could support this product further:

- there are some existing horsemen in their latter careers with a passion for brumbies, a significant collection of experiences and stories to share (eg. Jock, who has 70 brumbies on his property);

- the operators of Snowy Brumby Horsemanship in Dalgetty, NSW are prepared to act as a mentor and perhaps a distance business partner to help build this business up locally.

4.4 Wider feasibility

There is a need for a property that hosts the operation to be large enough for the brumbies to live and specifically large enough to provide sufficient and appropriate feed. Much of the local valley areas north of Swifts Creek attract higher use value to graze beef cattle. So, this proposal needs to determine suitable locations for the property to provide sufficient space and feed – be it as part of the operator's land or as part of agistment.

There is a need to determine how an ongoing supply of brumbies could be achieved. The business would need to access a few brumbies for rehoming each year. We are advised that certain brumbies from certain parts of the alpine area are more suited to this product than others.

To make this proposal more feasible would require:

- establishing the preferred sources of brumbies;
- establishing a supply that targets the preferred sources; and
- ensuring that capture and re-homing minimises stress to the brumbies.

4.5 Pre-feasibility conclusion

This proposal is the only one with a closely matched equivalent to model off and possibly partner or at least mentor a business. This significantly adds justification for a feasibility to further investigate and develop a concept.

However, it is critical that the supply of brumbies, a suitable location and sufficient local horse trainers are available as part of the feasibility scope.

5. Guided brumby spotting / tracking

5.1 The concept

We could not find a single product in Australia based on viewing brumbies, and only a few focussed on this experience in the world (USA and Croatia). There are no products involving tracking brumbies nor any involved in any type of monitoring (be it presence, location, numbers or impacts).

The vast majority of existing product is horse riding based on time (ie one hour, two hour, half day, multi-day). The remaining 20-30% focusses on the area that the ride will go. A minority (less than 5%) talk about wildlife to be seen and the chance to see brumbies is sometimes mixed in with the other animals.

The most accessible areas to view brumbies is probably State forests rather than national parks, due to the larger presence of roads, and also potentially that any future culling appears initially more focussed on wilderness areas and national parks.

It is proposed to establish a guided tour (4WD or horse) into State forest to find and view brumbies in the wild in one or more locations and settings. The guide would start the tour with a background to why the brumbies were brought to the region, how they were used and how they have become a part of the local culture of the region. This could be done in a new visitor centre (see **Section 2**), or a smaller facility (eg. a shed) at the guides property or at an equine facility (see **Sections 3 and 4**). The facility could include displays and an audio visual – as simple as a PowerPoint that the guide talks to).

The guide would then take the group to look for brumbies and visitors could watch and photograph them in the wild. Along the way the tour could include spotting of wildlife (eg. emu, kangaroos, kangaroos and wallabies), birds (eg. king parrots and wedge tailed eagles), and other introduced animals like wild deer and pigs. The tour could include a lunch at a mountain hut. The product could be ecotourism certified.

The base product could be an experience of around three to four hours, allowing the first hour for the introduction and the remaining time for driving to areas where brumbies are most likely to be viewable.

Points of difference to further strengthen the product could be:

- Guide operates a drone to view the same brumbies from the air and take photos
- Brumbies in a specific area are administered with a tracking device and the guide uses a tracking device to find them and build a profile of their sightings

Variations in the product could be:

- a lunch alongside a mountain hut;
- Use of First People's Horse Rangers as guides
- Photography focus, capturing light, moving horses, native vegetation, wildlife, sunsets etc

Inspirational similar products

Cody Wild Mustang Tours



Cody Wild Mustang Tours operates on 44,000 hectares of private land in Wyoming (USA), a desert area with many geological formations. Up to six customers are taken in a transit van to watch the horses and learn stories about Buffalo Bill Cody and old mountain man tales about Jim Bridger and early Indigenous people.

Sightings are not guaranteed and there is no refund if horses are not seen. The tour runs for 2.5 hours seven days a week twice a day from May to October⁴.

Table 5.1.1 Tour pricing for the Cody Wild Horse-riding tours

Customer	Price
Adult	\$109
Seniors	\$96
Youth (10 – 17 years)	\$65
Child (10 – 17 years)	\$21

Wild Horse Adventure Tours



Wild Horse Adventure Tours offers a two hour guided tour to view wild Spanish Mustang Ponies along the coast of in Corolla, North Carolina, USA. The tours use a customized 13-passenger, open-air Hummer H1. Each vehicle has been upgraded with military spec mechanical components, reconditioned engines, and extended frames to ensure a smooth ride through three distinct ecosystems. The Hummer features individual car seats in stadium seating to maximise viewing for all passengers. It also provides an upper windshield and soft top to provide 360-degree visibility while shielding guests from UV rays and inclement weather.

⁴ <https://codywmt.com/group-tours-cody-wild-mustang-tours>

Table 5.1.2 Tour pricing for the Wild Horse-riding tours

Customer	High season	Low season
Adult	\$109	\$96
Child (12 & under)	\$79	\$66

Wild Horse Photo Safari



Horses played a significant role in the development of the Livno region of Croatia. They were used for transport, work in the field, ride and all other activities that could help settlement. By acquiring mechanics in the second half of the last century, horses slowly lost their purpose and became surplus to the owners. The horses gathered on the plateau "Kruzi" and for the first time in history they had become completely free. According to the last count there were 420 wild horses in the area of Livno and they are believed to be unique in Europe.

This guided full day tour is focussed on not just seeing but getting up close to the wild horses. The group is driven to Cincar Mountain and the plateau of Kruzi. The first stop is for a group

'jump photo' to satisfy social media posters. The search for wild horses can take several hours but no tour has failed to find some yet. There is an opportunity for supervised feeding of the horses. A common and memorable sight is fighting stallions. The driver takes photos of the sights and customers can access the photos for a fee after the tour.

The three to four hour tour is run daily with a minimum of two persons⁵.

Table 5.1.3 Tour pricing for the Wild Horse Phot Safari

Customer	Cost
Adult	\$74
Child (up to 10)	\$41

Brumby Week

Brumby Week is an annual event held in late August 300km from Alice Springs. It is designed to teach people how to break in brumbies. The event includes 4WD tours to see and photograph the wild horses at waterholes and in the wild, as well as lectures and workshops on brumby behaviour, the history of early explorers and population control.

Thredbo Valley Horse riding

Thredbo Valley Horse Riding is a major advocate of the Snowy Mountain Brumbies, claiming them as a symbol of freedom and strength. They were involved in the 'Brumby Rally' at Parliament House in Sydney, advocating against brumby culling. Their horse collection includes brumbies and they are breeding them.

Tracking wild horses

This case study is not a tour but evidence of the tracking of wild horses⁶.

⁵ <https://continentaladventure.net/wildhorsessafari.html>

⁶ Hennig, J, 2018, Tracking Wild Horses in Western Confluence, <https://westernconfluence.org/tracking-wild-horses/>

⁷ <https://www.hoofrehab.com/WhatsNew/pollitt%20brumby.htm>

Management agencies need modern data on where horses go and what drives their selection of home ranges. This information could also be integrated into a tour product, addressing the challenge of finding brumbies, but also adding much more interpretive content – enriching the product and shifting it from nature to ecotourism.

In 2017 in the USA, adult mares were fitted with GPS collars that record precise locations every two hours and last for two years. The collars also communicate via satellite to send locations every 24 hours directly to my computer, providing information in almost real-time where the horses are so users can begin working with the data immediately. The GPS points are being used to estimate the horses' daily movement lengths and average mean home range sizes, and to examine the importance of different landscape characteristics to horses. For instance, how far do horses travel away from water sources, and do they prefer to spend time in predominately open areas or sites with rougher terrain?

Wild horse tracking in Australia

In 2008 the University of Queensland 'School of Veterinary Science has spent 12 months investigating the use of GPS technology to track the movements of wild horses⁷ in Central and northern Queensland, the Northern Territory and Eastern Kimberley. This technology is being applied to establish a complete picture of the movements of domestic and wild horses and how they interact with their environment.

Brumbies have been darted silently from a hide with a tranquiliser, giving the team two minutes to photograph feet, place permanent markers to determine hoof wall growth rates and attach the GPS collar. On reversal of the tranquiliser, the horse re-joins its family band unaware of the intervention. The same horse was recaptured using the dart gun at the end of the trial to retrieve equipment and then release it back to the wild.

Their GPS tracking units allow users to accurately pinpoint the location, speed and altitude of the horse at one-second intervals for up to one week or at 30-second intervals for up to six months.

A GPS unit is able to fix the position of the horse by aligning its position with at least six satellites orbiting overhead and storing the data on board. When data is retrieved, it is interfaced with Google Earth to produce an aerial photograph of the horse's movements (**Figure 5.1.2**) and be overlaid on a geographical mapping system which applies the data to soil and vegetation type, use of water points and topography type.

Figure 5.1.2 Example of a GPS tracker



It is possible to purchase tracking devices for horses through companies such as digitanimal, mini finder and Ubeequeue.

The use of LiDar to track wildlife

LiDAR (Light Detection and Ranging) is a remote sensing technology that uses laser light to measure distances and create highly accurate three-dimensional (3D) representations of objects, surfaces, and landscapes. It is widely used in various applications, including surveying, mapping, autonomous vehicles, forestry, agriculture, geology, archaeology, and urban planning. LiDAR data has numerous benefits in the context of animal ecology, offering valuable insights and enhancing research capabilities.

LiDAR can track animal movement patterns, including ground-dwelling species and those using tree canopies. It aids in understanding how animals navigate their environments, find food, and respond to changes in habitat structure.

LiDAR can assist in population surveys by helping researchers estimate animal densities and distributions. This is particularly useful for monitoring elusive or rare species.

LiDAR can be used to analyse animal movement patterns, including the detection of migratory routes, corridors, and travel pathways. Researchers can track how animals respond to changes in their environment or habitat.

Proposal for market testing

A guided safari to search for brumbies, then watch and photograph them in the wild. There might be a chance find them by searching for tracks or using tracking technology. Along the way could include spotting of wildlife and birds.



5.2 Market demand

Product appeal

Attachment A explains the market testing that was undertaken for this and the other four products, including a respondent profile.

Some 59% (176) of nature-based respondents tested through Pollfish stated that this experience “makes me want to travel to East Gippsland and stay overnight in the region”. This is considered an excellent score, 60% or more is considered outstanding. Within this sample, those that had undertaken some type of horse riding found the proposal even more appealing.

Table 5.2.1 Market response to Guided brumby spotting / tracking

Guided brumby spotting / tracking	All nature-based respondents (299)	Horse riding nature-based respondents (180)
Makes me want to travel to East Gippsland and stay overnight in the region	59%	70%
Makes me want to travel to East Gippsland, but NOT stay in the region overnight	12%	13%
I would do it but only if I was in the area	19%	12%
I am indifferent to the experience, could be swayed either way	5%	2%
I have no interest at all in participating in this experience	5%	3%

Horse-focussed respondents tested through Survey Monkey found the product even more appealing with 15 of 18 of respondents saying this experience “makes me want to travel to East Gippsland and stay overnight in the region”.

Preferred matching accommodation

Accommodation preference among nature-based respondents for this experience was evenly spread, but camping was the top preference:

- Camping 29% (86)
- Cabin with fully self-contained kitchen and lounge area 19% (58)

- Tiny house with bathroom and kitchenette 18% (53)
- Basic station-like, with shared bathrooms 17% (50)
- Basic station-like, with ensuites 14% (43)

Accommodation preference of the horse-focussed respondents for this experience was:

- Camping 8
- Basic station-like, with ensuites 5
- Cabin with fully self-contained kitchen and lounge area 2
- Basic station-like, with shared bathrooms 1
- Tiny house with bathroom and kitchenette 1

5.3 Potential supply

There is no product currently running horse riding or other guided experience to view brumbies in the wild.

One opportunity in pipeline status comes from Lancasters Horse Rides (Brett Lancaster). Since mid-January 2025, the business has been operating short horse rides that leave their Swan Reach property and utilise State Forest. The business is now contemplating occasional overnight rides into the Alpine National Park, which might see brumbies in the wild, but is unlikely to be marketed for this specific purpose. The product would involve a two-day ride and overnight camping for up to 12 customers at once.

A second concept could be to utilise the fenced in section of the Livingston River Corridor in the Omeo Valley to deliver guided horse rides designed as an introductory experience that leads to more ambitious rides and rides offering a chance to see brumbies in the wild. While independent riding in this corridor is discouraged the North East Catchment Management Authority is prepared to consider a licensed guided tour operator that adheres to strict environmental protocols.

A third concept could be for the delivery of high-country cattlemen and brumby storytelling in a local pub in Omeo. This experience could attract a wider range of customers, including non-horse riders to become aware of the culture and its stories. This product could also build demand for actual experiences through some simple profiling towards the end.

Figure 5.3.1 Lancasters Horse Rides



5.4 Wider feasibility

The largest issue to consider for this proposal is the long-term likelihood of being able to view brumbies, given the culling program. As the population reduces it would become less predictable to view brumbies. The operator might need to travel longer to find them. This proposal has suggested the use of LiDAR or alternative wildlife tracking system to assist the operator find brumbies, which may assist to counter their reducing numbers. Another option might be to advocate for a pause on culling in particular geographic areas that adjoin private property where owners supported brumbies. Restricting 4WD public access could further improve sightings and create a sense of exclusivity.

Secondly, as the culling is undertaken there is a chance that customers may see brumby carcasses, which is not what customers want to see. It might be possible for the operator to be supplied data reporting on culling areas near where the operator practices. This could assist the operator to avoid carcasses.

There is also the opportunity for a proposed high end accommodation proposal to be developed to support this business. Buckley High Country Adventures have two brumbies on their property near the Mitta Mitta River and a rustic cabin available to support boat fishing. Their masterplan proposes a lodge and three huts be constructed, targeting high end markets that fly in from the Dinner Plain Airport.

5.5 Pre-feasibility conclusion

Wildlife viewing, especially scarce wildlife, is extremely popular across the world, supporting many guided vehicle, horse-riding and walking operators. There is proven interest within the market to choose guided brumby spotting. The use technology to detect brumbies could allow a more efficient and reliable experience.

However, the uncertainty over culling and its objective of reducing the population means that this proposal is fundamentally constrained, if not unviable, without a shift in the current policy and approach on brumby culling. Addressing this political matter is beyond the scope of this project.

6. Mountain cattlemen and brumby immersion

6.1 The concept

Immersive experiences associated with mountain cattlemen found on the internet tended to be either add-ons at equine training facilities (see **Section 4**) or loosely attached to multi-day horse riding tours through former mountain cattlemen areas, where the lead guide is a highly experienced horse rider more than a mountain cattleman.

This concept is therefore to fill this void with an overnight or multi-night walking experience in the mountains to hear mountain cattleman stories and bumby-based horsemanship, learn camp skills and see some brumbies in the wild, along with other wildlife.

Variations in the product could be:

- walking one section and riding a horse for the remaining section, or vice versa, to contrast land tenure options;
- camp alongside mountain huts or use purpose-built huts
- doing challenges for participants to do along the way that earns them an honorary cattleman citizenship; and
- consuming gourmet food and quality wine.

Inspirational similar products

Bogong Horseback adventures – five day Man from Snowy River and Heritage Ride

The lead guide and owner's family have lived on a 580 acre farm adjoining the High Country for 50 years, and are close friends with the fifth generation of farming families who settled in this region in the 1870s. Michael has roamed the hills with these mountain cattlemen countless times, and developed much of his vast local knowledge from them. They offer short rides, two, three, 5-7 day and luxury rides with fly fishing.

The most distinctive product is a five day / four-night Man from Snowy River and Heritage Ride that offers:

- Experience to ride as 'Man from Snowy River' country, including memorabilia left behind from the film shoot
- Rustic overnight accommodation
- Authentic pioneer homestead experience (second and third night)
- Local gourmet cuisine
- Spectacular scenery and Australian wildlife

Operates once a month from November – April at \$3,000 per person, appears booked out for the foreseeable future (<https://watsonstrailrides.com.au/our-rides/five-day-rides>).

Figure 6.1 Horseback adventure with a local horseman





Mount Bogong Packhorse Tour

Bogong Horseback adventures are based at Spring Tour, a working horse property. They have licensed access to the Alpine National Park and Mount Bogong. The horses are a feature of this expedition, each of them our own bred and trained mountain horse, expertly matched to the rider. Each day the camp is packed up, loaded onto the packhorses and the journey continues. Riding is between 15 to 25 kilometres per day with opportunities for loping canters across open plains.

Camps are selected for their beautiful settings, some in traditional stock camps featuring huts, but often secluded bush camps maintained by BHA. With swags rolled out dinner is prepared and enjoyed around a warming fire, with a cold beer, a local wine and a meal prepared from local fresh produce on the coals.

All expeditions include a night before and a night after at Spring Spur, where you can join the family for a meal and enjoy your comfortable ensuite room.

The cost per person is \$4,290

High country hiking tours



This operator provides small group guided tours from the summits of Mt Stirling and Mt Buller, through valleys where mountain rivers flow, across the ridges of Eagles Peaks and The Crosscut Saw we hike, visiting high country huts. A lead product is a two day walk to the iconic Craig's Hut (movie set built especially for The Man from Snowy River), where customers spend the night. The cost is \$726 per person.

The operation also offers customised tours and some unique experiences at Craig's Hut, such as a photography-based night, a wedding elope and a bushman's supper. This creativity could be linked up with a bushman to build another product featuring cattleman immersion.

The Mountain Cattleman's Association of Victoria

The Mountain Cattlemen's Association of Victoria (MCAV) represents a hardy group of people whose families and predecessors have grazed their cattle and maintained the Victorian High Country since 1834.

The Mountain Cattlemen's Association of Victoria Annual Get Together (G2G) is a three-day festival that celebrates the traditions and culture of Mountain Cattlemen along with all of Victoria's pioneers. They represent a valuable network to source potential guides and

operators, as well as wealth of knowledge that could be integrated into the storytelling and activity mix.

Proposal for market testing

An overnight or multi-night walking experience in the mountains with a mountain cattleman to hear his stories about high country life and brumby-based horsemanship, learn some high-country camp skills and see some brumbies in the wild, along with other wildlife.



6.2 Market demand

Product appeal

Attachment A explains the market testing that was undertaken for this and the other four products, including a respondent profile.

Some 62% (184) of nature-based respondents tested through Pollfish stated that this experience “makes me want to travel to East Gippsland and stay overnight in the region”. This is considered an outstanding score. Within this sample, those that had undertook some type of horse riding found the proposal slightly more appealing. This difference was not as great as the other proposals, perhaps because it was already the highest scoring proposal.

Horse-focussed respondents tested through Survey Monkey found the product even more appealing with 15 of 18 of respondents saying this experience “makes me want to travel to East Gippsland and stay overnight in the region”.

Table 6.2.1 Market response to mountain cattlemen and brumby immersion

	All nature-based respondents (299)	Horse riding nature-based respondents (180)
Mountain cattlemen and brumby immersion		
Makes me want to travel to East Gippsland and stay overnight in the region	62%	68%
Makes me want to travel to East Gippsland, but NOT stay in the region overnight	14%	16%
I would do it but only if I was in the area	13%	10%
I am indifferent to the experience, could be swayed either way	8%	5%
I have no interest at all in participating in this experience	3%	2%

Preferred matching accommodation

Accommodation preference among nature-based respondents for this experience was dominated by camping, probably because respondents realised that this was an intrinsic part of the proposal to be able to stay overnight in remote and / or wild locations:

▪ Camping	37% (111)
▪ Cabin with fully self-contained kitchen and lounge area	16% (49)
▪ Basic station-like, with shared bathrooms	16% (48)
▪ Tiny house with bathroom and kitchenette	15% (46)
▪ Basic station-like, with ensuites	12% (36)

Accommodation preference of the horse-focussed respondents for this experience was also camping focussed:

▪ Camping	12
▪ Cabin with fully self-contained kitchen and lounge area	2
▪ Basic station-like, with ensuites	2
▪ Basic station-like, with shared bathrooms	1
▪ Tiny house with bathroom and kitchenette	0

6.3 Potential supply

There was a product offering something similar to this product. Lewis Benafetti (Wild Horse Tours) has 35 years' experience in alpine horse riding, rehoming brumbies and mountain cattleman life. Lewis owns the business Wild Horse Tours, and formerly ran guided horse rides up into snow covered Mount Cobbler to experience unpredictable weather, learn about mountain cattlemen and see brumbies. The business attracted all ages keen for an authentic experience and had 1,700 followers on its Facebook site. However, when the business unexpectedly saw dead brumbies (shot dead), the product was cancelled.

Lewis has conceptualised an alternative product that targets Nunniong State Forest. If brumby culling was minimised in Nunniong State Forest, then the product could include the opportunity to see brumbies in the wild. The experience could start with customers bringing their own horse, camping equipment and most food to Nunniong for a three day / two-night experience broken into:

- Friday late in the day arrive, tether horses and set up camp
- Saturday morning ride, lunch, second ride in the afternoon then a campfire roast prepared by Lewis
- Sunday morning ride, then after lunch break up camp and leave

This product could start in the winter of 2025. The operation could be run self-sufficiently but would work much better if the following could be constructed at Nunniong State Forest:

- wooden horse yards for a more reliable horse tethering; and
- campsite for up to 25 people with toilet, picnic area, firewood store and fireplace.

This infrastructure would broaden the market and number of customers and significantly improve business viability. It would need a modest amount of external funding.

Beyond Lewis, this project did not identify any other mountain cattlemen that could feature in this product. However, contacts might be able to be identified by approaching experienced local horsemen and the Victorian Cattleman's Association to explore who they know that could be interested.

The Bentleys Plain campground and horse yards are located just south of the ideal location needed for transitioning Nunniong into a leading equine, brumby and cattleman experience for the region. The Bentley Plain campground sits along Nunniong Forest Drive within the Bentley Plain Scenic Reserve. The site includes a former forestry hut, known as the 'Bush Hilton', which provides a glimpse into how forestry workers lived many years ago. The campground is open with good access to several fire pits, a large picnic shelter and toilet. The historical Moscow Villa Hut, Washington Winch and various walks are located nearby.

Figure 6.3.1 Map of the Bentley Plain recreational facilities

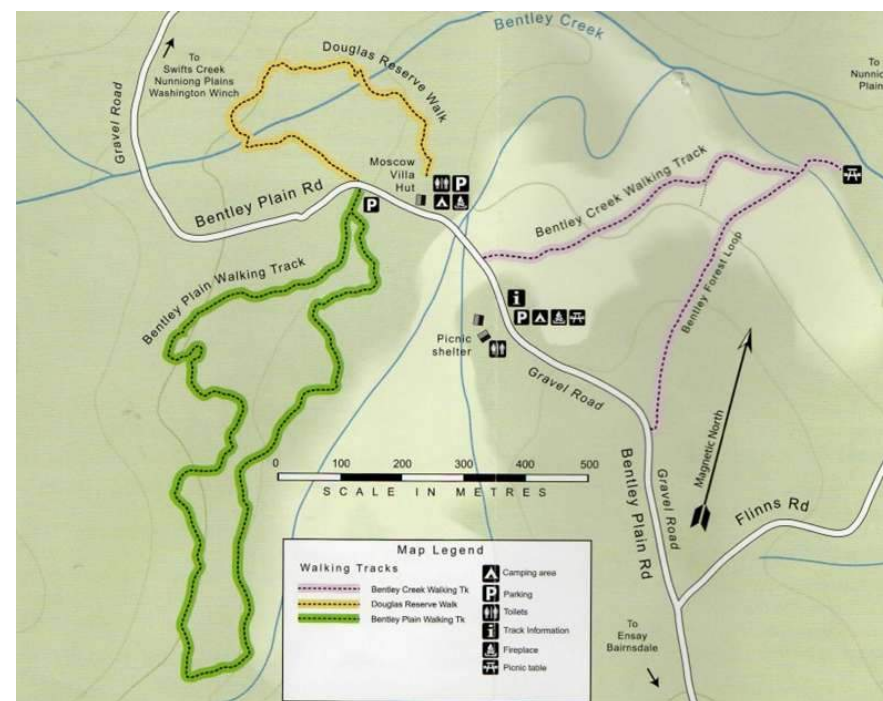


Figure 6.3.2 The Bentleys Plain horse yards are a good example of what is needed to support the Wild Horse Tours proposal



6.4 Wider feasibility

Making this product really appealing requires scripting to shape the experience and deliver the stories akin to a movie. This scripting might shape the experience to set participants up with some challenges that once achieved brought them a real sense of achievement and personal growth. To do this, it could be useful to reflect on films like *City Slickers* for inspiration.

Scripting would avoid the standardised approach of the experience being all about the route and the ride, as appears to be the focus of existing products in Australia.

6.5 Pre-feasibility conclusion

This proposal is less reliant on brumbies, so avoids some of the spotting challenges of the guided tour proposal (**Section 5**). This proposal generated the strongest appeal from the sampled market and is the most differentiated. In these respects, this proposal offers the most feasible opportunity.

Therefore, the top priority arising from this project should be to source external funding to support the Wild Horse Tours' proposal at Nunniong State Forest.

The Wild Horse Tours' proposal may be the exception, but typically a business proposal like this would benefit from:

- to help avoid burnout, source two cattlemen with the history, skills and stories to act as the lead interpreter for the experience. These individuals need to be old enough to have significant experience but young enough to undertake the physical conditions and work associated with the tour for at least a decade, so that the business can be consolidated; and
- to maximise viability, add a business manager and a tour guide that can deliver the operational aspects and general guiding and interpretation. This would position the cattlemen to be the star and avoid them getting burnout.

7. Conclusion

7.1 Recapturing existing, pipeline and concepts in the region

Existing equine experiences identified in this report are:

1. Lancasters Horse Rides
2. Three events: Swifts Creek Picnic Races, Omeo Rodeo and Dinner Plain Horse Polo

The annual equine events are run in peak visitation periods like Easter, when such a stimulus is not required. Running multiple events during the same holiday period cannibalises visitation at each and exhausts local hosts. It would make sense to separate the event timing and place them on long weekends rather than major holiday periods.

Two supporting accommodation and food and beverage services located in rural or natural settings matching the equine tourism setting are the: Anglers Rest accommodation and pub / restaurant (Blue Duck) and The Willows accommodation. **Figure 7.1** locates these existing experiences. In addition, there is significant accommodation room stock in Omeo largely supplied by pubs.

Two equine-related pipeline projects have been identified in the region:

3. Eco accommodation (High Country Adventure Tours)
4. Lancaster Horse Rides overnight horse ride and camping

Six concepts have also been identified:

5. Bindi Equine Wellness and Therapy Centre
6. Wild Horse Tours, Nunniong
7. High Country Cup, Nunniong
8. Horse and native wildlife viewing
9. Livingstone River horse riding
10. Omeo Pub brumby and cattlemen tales

Figure 7.2 locates the proposed pipeline and concept proposals outlined in previous sections.

7.2 Overall feasibility of equine and brumby tourism in region

It can be concluded that equine tourism in the region is feasible, due to strong market demand, preparedness to travel significant distances and unusually low expectations for hard roofed accommodation. In addition, **Figures 7.1 and 7.2** suggest that even if just one third of the pipeline and concepted product was created, then the region would have a critical mass of product sufficient to position the region as having an equine tourism product pillar.

The recently constructed mountain bike park in Omeo is attracting visitors and is strengthening occupancy in the Omeo accommodation sector. It is reasonable to assume that much of this market could be interested in adding an equine and even a brumby tourism experience to their stay. Similarly, the use of Omeo during the ski season as a satellite accommodation hub brings a second market that will look for half day perhaps day equine and brumby experiences when the skiing weather is poor, the road access is closed or the skiers' need some recovery time.

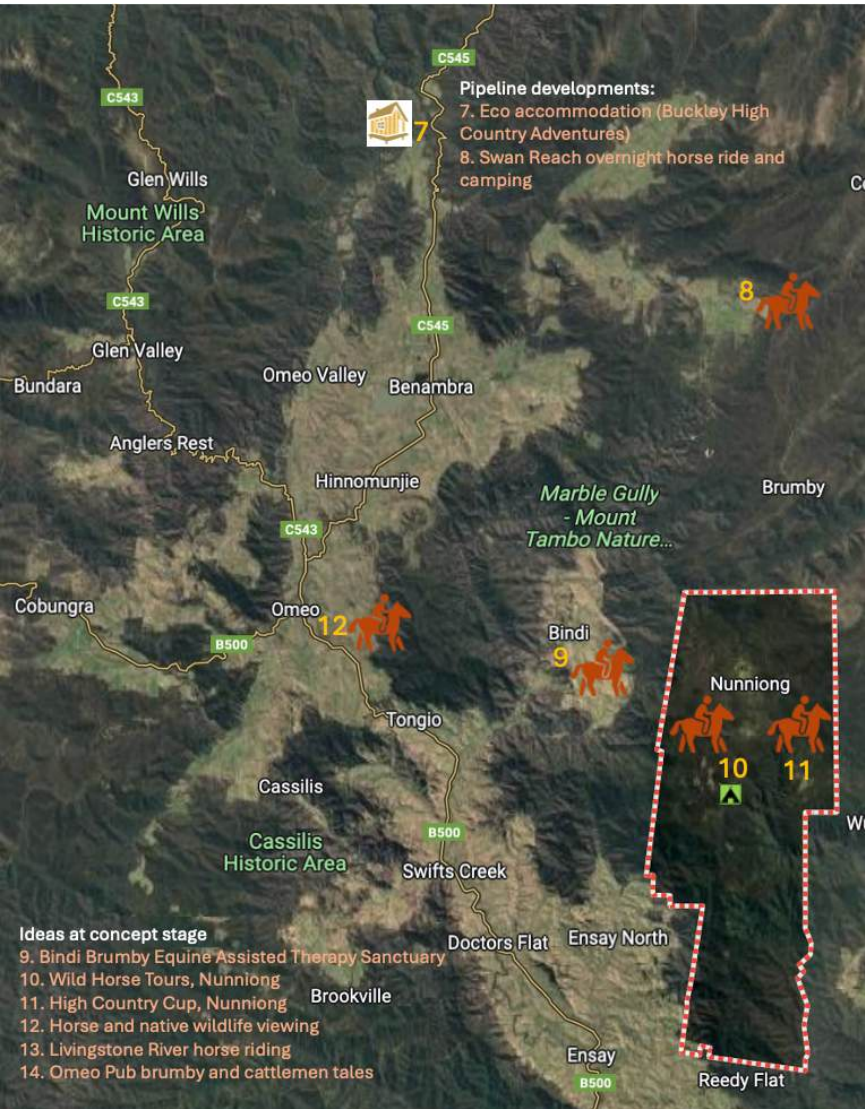
As equine tourism is developed, there may be a challenge to provide sufficient authentic accommodation that 'fits' the equine rural and natural settings. There is very little 'short stay' accommodation in Swifts Creek. Accommodation in Omeo is heavily booked in winter by the ski market transiting to the nearby ski fields. Occupancy throughout the year is likely to lift as a result of the recently constructed mountain bike park in Omeo attracting more visitors.

Developing some of the equine and brumby tourism product in pipeline and concept stage will only require camping sites and equipment. The market research confirmed strong interest in camping over other forms of hard roofed accommodation. Nonetheless, occupancy in highly authentic rural accommodation is surprisingly popular. Guests are foregoing creature comforts to have an authentic experience in places like The Willows and Anglers Rest (Blue Duck). This reduces the cost barrier to establish and maintain accommodation. However, some property owners are not doing enough to maintain this accommodation and run the risk of damaging this brand and losing market support.

Figure 7.1 Location of EXISTING equine experiences outlined in previous sections



Figure 7.2 Location of PROPOSED pipeline and concept proposals outlined in previous sections



7.3 Most feasible concept(s)

Determining which products to focus on developing is a tricky matter. Ultimately it might come down to who has the resources and commitment to push through and make it happen.

The products with the strongest market interest (Mountain cattlemen and brumby immersion and Guided brumby spotting / tracking) are also the most challenged on the supply side. The Mountain cattlemen and brumby immersion is challenged to supply cattlemen while the Guided brumby spotting / tracking is challenged to source the brumbies, given that they are largely found on public land where there is a policy to cull them.

Table 7.1 Strength to influence respondents to participate in the experience and stay overnight in the region

Product	All nature-based respondents (299)	Horse riding nature-based respondents (180)	Preferred accommodation of all nature-based respondents
Mountain cattlemen and brumby immersion	62%	67%	Camping
Guided brumby spotting / tracking	59%	70%	Camping
Brumby wing of a nature-based tourism, conservation and education centre	54%	65%	Camping
Equine brumby training facility (with accommodation)	54%	65%	Camping
Equine wellness and therapy centre (with accommodation)	51%	54%	Camping

7.4 Further support from East Gippsland Shire Council

Council plays a key role in supporting private entities pursuing tourism investment opportunities by creating a business-friendly environment and facilitating access to essential services and networks. Key areas of support include:

- Business Concierge Service: Council's Business Concierge acts as a single point of contact to guide investors through the regulatory process, providing advice on planning, permits, and approvals. They help streamline interactions with Council departments to reduce delays and simplify the investment journey.
- Visitor Marketing and Promotion: Council actively promotes the region through destination marketing initiatives, events, and campaigns. They work to increase the area's profile, attract visitors, and support tourism businesses by showcasing local experiences through various media and promotional channels.
- General Support: Beyond direct services:
 - data provision (like visitor statistics);
 - networking opportunities;
 - advocacy to other levels of government to help facilitate tourism development projects; and
 - grant information – Council has a subscription to Grant Guru to support local businesses in accessing a comprehensive list of grant and funding opportunities from sources across state and federal government, corporate and philanthropic East Gippsland Grant Finder.

By providing these services, Council aims to encourage sustainable tourism investment that benefits the local economy and enhances the visitor experience.

7.5 Other contacts

Parks Vic [www.Camping with your horse in the Bogong High Plains \(parks.vic.gov.au\)](http://www.Camping with your horse in the Bogong High Plains (parks.vic.gov.au))

DEECA [Horse riding \(exploreoutdoors.vic.gov.au\)](http://Horse riding (exploreoutdoors.vic.gov.au))

Free grant search website for funding and support programs from across government <https://business.gov.au/grants-and-programs?resultsNum=10>

GrantConnect provides centralised publication of forecast and current Australian Government grant opportunities and grants awarded <https://www.grants.gov.au/>

Attachment A – Market testing

The approach used

The market testing was used to identify the level of interest in new Brumby-based tourism product options and which options would trigger a visit to stay overnight in East Gippsland.

A survey was developed to present respondents with descriptions and images of five brumby-based experiences. A question then asked to rank the products for their strength to influence to participate in the experience and stay overnight in the region. East Gippsland Council tourism staff were asked to endorse the following products to be tested:

1. Brumby wing of a nature-based tourism, conservation and education centre
2. Equine wellness and therapy centre (with accommodation)
3. Equine brumby training facility (with accommodation)
4. Guided brumby spotting / tracking
5. Mountain cattlemen and brumby immersion

The market testing platform was set up to recruit the desired respondents who had participated in one or more of the following activities in the past three years:

- day bush walks
- swimming in a natural environment eg beach, river or lake
- horse riding
- snow sports
- camping
- mountain biking
- overnight bush walking.

The survey was placed online through the Pollfish platform from late August to early September 2024. Some 299 persons were recruited and undertook the survey. These people have been referred to as the nature-based respondents. The data was analysed and is presented below and in the sub-sections of **Sections 2 to 7**.

In an attempt to survey people with a more substantial involvement in horses and horsemanship, we posted a Survey Monkey link to the following Victorian based Facebook pages:

- Everything Equine Victoria
- Equestrian and farming Victoria
- Everything Horses Victoria – equine therapy
- Equine Services Victoria

We received a total of 19 responses. These people are referred to as the horse-focussed respondents.

Demographic profile of respondents

Residence

All nature-based respondents resided in Melbourne and surrounding suburbs.

Gender

There was slightly more female (54%) than males (46%) nature-based respondents.

Age

Almost 60% of nature-based respondents were aged between 25 and 44 years of age, age group splits were:

- 14% aged 18 – 24 years
- 28% aged 25 – 34 years
- 31% aged 35 – 44 years
- 21% aged 45 – 54 years
- 6% aged over 54.

Household income

- 32% of nature-based respondents earn between \$75,000 and \$124,999 annual income
- 31% of nature-based respondents earn over \$125,000

Visiting Gippsland and the Alpine High Country

- 81% of nature-based respondents had visited Gippsland
- 73% of nature-based respondents had visited the Alpine High Country

Nature-based respondents who had experienced horse riding in the past three years (180) had a higher rate of visiting Gippsland (92%) and the Alpine High Country (87%) than those that had not.

- 92% of horse-riding nature-based respondents had visited Gippsland (165)
- 87% of horse-riding nature-based respondents had visited the Alpine High Country (157)

Almost all (18 of the 19) horse-focussed respondents had visited Gippsland and the Alpine High Country.

Past participation in an experience involving one or more horses

Some 81% of survey nature-based respondents had participated in an experience involving one or more horses. Breakdown of these experiences are:

- | | |
|--|-----|
| ▪ I've been on a facilitated horse ride for less than half a day | 43% |
| ▪ I've been on a facilitated horse ride for a full day | 37% |
| ▪ I ride a horse on my own | 36% |
| ▪ I own / owned a horse(s) and care(d) for it | 33% |
| ▪ I've undertaken multi-day training in horsemanship | 30% |
| ▪ I've been on a facilitated horse ride overnight or longer | 27% |
| ▪ Equine therapy / wellness experience | 19% |
| ▪ I've led horse riding as a facilitator, guide or trainer | 11% |
| ▪ I use a horse for work purposes | 7% |

17 of the 19 horse-focussed respondents owned and cared for a horse.

Opinion of wild brumby population

Some 67% of the nature-based respondents were happy with the wild brumby population currently living in the Alpine High Country of Victoria.

Some 14% had no opinion, 13% would prefer further humane culling in the high value environmental areas and 6% would prefer there to be no wild brumbies in this area.

When asked "Does your answer to the previous question influence the appeal of any of the five brumby-based experiences presented earlier?" nature-based respondents indicated:

- 53% no
- 43% yes
- 4% other

Some 14 of the 19 horse-focussed respondents were happy with the wild brumby population currently living in the Alpine High Country of Victoria.

When asked "Does your answer to the previous question influence the appeal of any of the five brumby-based experiences presented earlier?" horse-focussed respondents indicated:

- 10 yes
- 6 no