Budj Bim Master Plan

One of Australia's great national heritage landscapes, Budj Bim will be recognised nationally and internationally as a special place that offers unique and authentic visitor experiences of a living indigenous culture, a history and a landscape which does not exist anywhere else.
This Master Plan has been prepared for the Gunditj Mirring Traditional Owners Aboriginal Corporation.

The Budj Bim landscape has over recent years, been subject to a range of technical studies that consider conservation, archaeology, tourism planning, business development and Gunditjmara community use. This Master Plan draws together these findings and presents a strategic vision for the Budj Bim landscape based on the conservation and sustainable use of the landscape for cultural, tourism and community purposes. That vision, along with site planning, development and design principles will inform more detailed business planning, site planning, site management and decision making.

As a planning document, the Master Plan is a distillation of existing management plans and new ideas. It is not intended to provide detailed site design or to define every site use or commercial opportunity that the Gunditjmara community or tourism development industry may ultimately realise. The scale and schematic nature of the concepts provided reflects this approach.

The Master Plan is presented in two parts:

1. This Budj Bim Master Plan report provides an overview of the key actions required to establish the Budj Bim Landscape as a sustainable tourism destination. This report will be available to a wide range of stakeholders, authorities and interested parties, including prospective tourism business partners.

2. The Budj Bim Master Plan Technical Report is a background document that provides more detailed analysis of site context, site conditions, tourism markets, consultation findings and development recommendations, along with a possible longer term vision of actions that will support tourism use, community use and the development of the site as a World Heritage landscape. These actions will depend on further land acquisition, infrastructure changes, private investment and other forms of funding support that are not certain at this time. The Technical Report will only be available to the Gunditj Mirring Traditional Owners Aboriginal Corporation for their use.

### Acknowledgements

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This report has been prepared by Tract Consultants Pty Ltd (Landscape Architects, Urban Designers, Town Planners), working in association with Urban Enterprise Pty Ltd (Land Economics & Tourism Planning) and Louise Thomas (Consultation) under the management of the Gunditjmara community based organisations that has been extensively referenced within the Master Plan.

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### Terms Used In The Report

The term Budj Bim National Heritage Landscape refers to the sites listed by the Australian government in 2004. There are currently nominations to add two additional Aboriginal community owned properties to the national heritage listing. As the Master Plan considers a range of sites and locations that are not listed areas we have adopted the term Budj Bim Landscape to represent all areas affected by the Master Plan recommendations.

GMTOAC - Gunditj Mirring Traditional Owners Aboriginal Corporation

WMAC - Winda Mara Aboriginal Corporation

#### Disclaimer

In the course of preparing this report, analysis, estimates and projections have been prepared on the basis of assumptions described in the report. It is possible that some of the assumptions underlying these projections and professional judgements may change over time. Professional judgements are made to provide a basis for estimates, projections and project recommendations. Tract Consultants and its project sub-consultants do not accept any liability for the use of this material.
Executive Overview

Budj Bim Master Plan

In the Dreaming, the ancestral creators gave the Gunditjmara people the resources to live a settled lifestyle. They diverted the waterways, and gave us the stones and rocks to help us build the aquaculture systems. They gave us the wetlands where the reeds grew so that we could make the eel baskets, and they gave us the food-enriched landscape for us to survive.’

Eileen Alberts from the Gunditjmara (em Press, The People of Budj Bim (2010)

The Master Plan

The Budj Bim Master Plan has been prepared for the Gunditj Mirring Traditional Owners Aboriginal Corporation. It presents a vision for the conservation and sustainable use of the Budj Bim National Heritage Landscape for cultural, tourism and community purposes, and provides an enabling framework for the government, the Gunditjmara community and tourism industry to invest in the future development of the Budj Bim Landscape as a tourism destination and as a home to the Gunditjmara community. That future will be based on partnerships between public and private groups and on the incremental and flexible development of tourism products and resources across the Budj Bim Landscape.

Why is a Master Plan needed?

The Masterplan is a distillation of existing management plans and new ideas. It is a long term strategic vision and is not intended to provide detailed site design or to define every site use or commercial opportunity that the Gunditjmara community or tourism development industry may ultimately realise within the Budj Bim Landscape.

The Budj Bim National Heritage Landscape

The Budj Bim National Heritage Landscape is a unique place with universal heritage values that demonstrate how Gunditjmara people worked with the natural resources and environment of the Victorian south west region to establish a permanent place of human society over the past 30,000 years and beyond.

Budj Bim will become a significant national and international tourism destination – one of Australia’s great national heritage landscapes – and it will be recognised nationally and internationally as a special place that offers unique and authentic visitor experiences of a living indigenous culture, a history and an environment which does not exist anywhere else.

The Indigenous Tourism Opportunity

Indigenous tourism is a key segment of the Australian tourism market and an emerging growth sector.

In 2009, spending by Indigenous tourism related visitors was valued at $7.2 billion, representing 12% of total visitor expenditure in Australia. Tourism Australia has identified Indigenous tourism as one of the seven key experiences which underpin Australia’s global marketing activities.

In the year ending 30th June 2012, an estimated 69,800 international visitors to Victoria participated in a local Aboriginal experience while in the state. Victoria’s market share of international Aboriginal tourism visitors is estimated to be 9.3% of overall visitors. This relatively low base provides a great opportunity for Aboriginal tourism to increase its economic contribution to the state and to provide unique, authentic and place specific visitor experiences in an increasingly crowded tourism market.

Key Tourism Planning Issues

Tourism strategy and policy context

The Australian Government’s 2009 National Long Term Tourism Strategy identifies that in order for Australia to remain competitive in the Global tourism market; continued investment is required to deliver quality sustainable tourism product and services that provide visitors with compelling tourist experiences.

The Budj Bim National Heritage Landscape falls within the Great Ocean Road tourism region. The Great Ocean Road is one of 10 regions in Australia considered a nationally significant landscape. Australia’s National Landscapes program was developed to provide a long term strategic approach to tourism and conservation to highlight Australia’s most outstanding natural and cultural environments. The program aims to achieve partnerships between tourism and conservation to:

- Promote Australia’s world class, high quality visitor experiences;
- Enhance the value of tourism to regional economies;
- Enhance the role of protected areas in those economies; and
- Build support for protecting our natural and cultural assets.

The Budj Bim National Heritage Landscape has the potential to broaden the nature based and cultural experiences of the Great Ocean Road region through the provision of authentic Indigenous cultural and heritage experiences linked to outdoor activities.

The 2009 Jackson Report, which informed the National Long Term Tourism Strategy, identified Indigenous culture as an important national ‘competitive advantage’ and a ‘key point of differentiation for Australia’. At a state level, policy identifies the need to build upon Victoria’s unique Indigenous heritage to strengthen local Indigenous community and business sectors. Accordingly, the Draft Victorian Aboriginal Tourism Development Plan (2013) identifies gaps in Indigenous tourism product, particularly in meeting domestic Victorian demand for experiencing Indigenous product within their own state and the potential for growth in international experiences. The plan identifies the Budj Bim Landscape as one of the key opportunities in the State to deliver an iconic Aboriginal experience.
The Great Ocean Road Tourism Destination Management Plan identifies the development of Lake Condah/Budj Bim National Heritage Landscape as a priority project for the Region. Budj Bim has the potential to deliver a number of tourism experiences that are identified as key opportunities for the Great Ocean Road centred on seafood, music events and Indigenous culture. Budj Bim already provides some of these experiences, however with further investment these could be enhanced to provide a number of truly authentic and iconic experiences.

Visitor Markets
The Great Ocean Road region attracts over 8 million visitors per annum. The Broader Discovery Coast Region which includes Glenelg Shire and the western part of Moyne Shire captures around 7% of total visitation to the Great Ocean Road, attracting 566,000 visitors including 306,000 overnight and 260,000 daytrip visitors.

The Budj Bim Sustainable Tourism Plan (2007) undertook primary research into Victorian visitor markets, this research identified that 8% of visitors to Victoria would visit Budj Bim if it were developed further into a defined Indigenous product. Analysis of existing Indigenous destinations and a review of segmentation undertaken by Tourism Australia highlights a number of potential target markets for Budj Bim. These markets are:

Broad visitor segments
- Socially Aware domestic visitors.
- International experience seekers.

Niche visitor segments
- Domestic retired self-drive visitors.
- Corporate/business visitors.
- Education market.
- Coach and Tour Visitors.
- Special Interest Groups.

Tourism Product Audit & Opportunities
The audit of tourism product in Shipwreck and Discovery Coast region1 suggests its tourism strengths are in nature-based experiences (bushwalking, trails, and wildlife), sea and water-based tourism (fishing, beach, seaside holiday home establishments, and whale watching) and Indigenous tourism (Tower Hill and Budj Bim National Heritage Landscape).

Ther is limited commercial food products, high-end nature based fixed accommodation, adventure activities, festival and events and shopping in the Shipwreck and Discovery Coast region and within the Budj Bim Heritage Landscape, in comparison to the whole of the Great Ocean Road Region. This may be influenced by distance of the region to major regional centres and the moderate level of visitor dispersal from the touring routes in the region.

The audit has found strong potential within the Budj Bim National Heritage Landscape to be developed as a tourism destination, depending on further development to draw and sustain visitation. Themes for product development at Budj Bim include:

Interpretation
- Expansion of guided walking tours
- Multi-sport guided tour
- Self-guided interpretation

Nature – based Activities
- Multi-sport guided tours – canoeing, hiking, mountain biking
- Events – multi-sport, food and Indigenous music events
- Art – programs and sales
- Cultural education programs
- Off-site regional activities including scuba diving, water based cruises and wildlife tours

Infrastructure & Facilities
- Accommodation: Self-contained accommodation [cabin], bunk house accommodation, safari camping and caravan & camping sites
- Interpretive / orientation centre that can provide information and structure visitor activities
- Multi – purpose room to support education, training and conference uses

Food & Beverage
- Portable food vendor at key visitor sites at specific times
- Commercial kitchen facility to support key accommodation and event uses
- Bush foods, particularly featuring eel and aquatic food products

Special Events
- Seasonal cultural events and festivals. Events could be programmed to take advantage of off-peak tourism times, existing events such as the Heywood Wood, Wine and Roses Festival or the Port Fairy Folk Festival or timed to coincide with environmental seasons.

Special tour products to suit specialist groups (eg Cruise ship market)
- Unique tour products and visitor packages including food / beverage / souvenirs and unique visitor experiences, potentially including one-off activities such as flights, diving, Aboriginal cultural activities and wildlife viewing that may not be a regular part of a tourism experience.

As the tourism market (and potentially the Budj Bim site network) develops over time there will be further opportunities for new products and capacity upgrades to existing products and services including:
- Higher standard accommodation options in new locations
- Additional safari camping options
- Higher standard food / beverage / specialist souvenir sales in key locations
- Additional trail and interpretations activities

Key Planning & Design Issues
Developing new ways of seeing culture and landscape
Budj Bim is not a landscape that easily explains itself to visitors through spectacular views and dramatic landscape changes. It is a subtle landscape that reveals itself in different places and seasons through ecological patterns, geology, landscapes and settlement features. The Master Plan approach must be place specific.

Cultural Heritage Significance
The Budj Bim Landscape was included on the National Heritage List (NHL) on 20th July 2004 because of its outstanding cultural heritage importance to the nation and was the first Indigenous place to be included on the NHL. The significance of the Budj Bim landscape is represented by:
- Indigenous tradition
- Sophisticated aquaculture systems
- Defending country
- Native Title process
- Living culture
Environmental Significance

The Budj Bim National Heritage Landscape is classified at state and national level for a range of environmental values.

- Geomorphology related to the Tyrendarra lava flow
- Flora and fauna related to the dominant Stony Rises Manna Gum Woodland community.

The Gunditjmara Community

Consultation with the Gunditjmara community and key stakeholders suggest that there is strong support for the concept of developing sustainable tourism within the Budj Bim Landscape, but that development and use of the landscape must be based on a set of principles that recognise the special nature of the place and the rights and needs of the Gunditjmara community.

The broader definition of Gunditjmara country

The story of the Gunditjmara people and the Budj Bim landscape is not limited to the existing Heritage Listed landscape sites. Gunditjmara stories and the visitor experience must connect to other regional sites including the Convincing Ground (Allestree coast), Mount Napier, Tower Hill and the Tyrendarra coastline.

The importance of story

Visitor experience in this setting must be shaped by a narrative that ties together and explains the various elements that make up this place. That site narrative will be based around the story of the Budj Bim Landscape and the continuing journey of the people who lived there and their unique relationship to the land. The story will be told in many parts and in many places across the landscape.

The Budj Bim Landscape is incomplete

The stories related to the Budj Bim Landscape relate to a range of places that have meaning for the Gunditjmara people – settlements, cultural places, locations linked to harvesting of the landscape and to historical events. Over the long term, where possible, these sites should be represented within an expanded and integrated Budj Bim Landscape network as well as through interpretation.

Environmental sustainability is essential

The Budj Bim Landscape must function over the long term as a living landscape that represents the essential qualities of the regional landscape. Climate change modelling suggests a warmer, drier and more extreme climate for Victoria in the future and the Budj Bim Landscape may be affected by climate change in the long term.

Landscape character and environmental quality are key parts of the Budj Bim experience

Landscape character, visual quality and environmental quality must be seen as ‘cultural artefacts’ in the same way as archaeological features. The restoration of the appearance and environmental function of landscape is an important initiative.

The Budj Bim Landscape as a tourist destination is starting from a low infrastructure base

The existing visitor experience is typically limited in terms of complexity and quality.

Visual ‘legibility’ is a key part of the visitor experience

The way in which visitors see the landscape and individual sites is important to their understanding of the landscape and the Budj Bim story. Developing a more integrated and site specific access system for the Budj Bim Landscape is an important component of any tourism development plan.

This is a changeable landscape

Budj Bim is subject to seasonal changes such as flooding which changes access patterns and the character of the landscape which suggests that there is a need for alternative ways of seeing the landscape, different activities and experiences during different seasons.

Town planning and development facilitation

The Budj Bim National Heritage Landscape and related sites are subject to a number of zone and overlay provisions, making the process of seeking planning approval for the use and development of the land potentially more complex and time consuming. There is potential to streamline this process through:

- Rezoning of some areas to create a more consistent zoning approach.
- Rezoning of selected future activity areas to the Special Use Zone (SUZ), with appropriate Schedule controls matched to the proposed long term Master Plan outcomes.
- Implementation of a Pre-application Process to assist applicant proposals, Responsible Authorities and land owners.

The Master Plan Concept

A vision for the future

The Budj Bim National Heritage Landscape will be recognised as one of Australia’s great National and (future) World Heritage landscapes. It will be universally recognised as a place with:

- A living Aboriginal culture and home to the Gunditjmara people.
- Unique natural landscapes with sustainable ecological and landscape systems.
- Internationally recognised cultural heritage values - values which link all cultures and people.
- Enriching and memorable experiences for visitors and guests - experiences that are unique to this place and to the Gunditjmara people.
- Strong and successful partnerships between traditional owners, governments and the tourism industry, providing world’s best practice in caring for country and sustainable tourism.
- Partnerships with regional, national and international cultural tourism sites and related institutions.

Guiding Principles

- The Budj Bim National Heritage Landscape will be recognised as one of the most significant natural and cultural World Heritage areas in Australia, offering visitors a range of enriching and memorable experiences that are inextricably linked to the south-west of Victoria and the Gunditjmara culture.
- Budj Bim is home to the Gunditjmara people. They will influence, manage and participate in the development of tourism from which they will gain economic and social benefit, at a pace and level they determine.
- All parties recognise and will seek to enhance the protection of Budj Bim’s diverse landscapes, ecological systems and internationally recognised cultural heritage sites.
- Aboriginal culture and the land on which it is based will be protected and promoted through well-managed tourism practices and appropriate interpretation.
- Respect for customary law and traditions will underpin all tourism decisions.
- Tourism should be a part of Budj Bim, not the dominant element within the Budj Bim Landscape. The progress and development of tourism will be undertaken in accordance with the wishes of the traditional owners and at a pace which is consistent with their own values and aspirations and at a pace and level which does not harm nature or culture.
- The Gunditjmara people may lease their land to Government or private entities to be co-managed as a national park or reserve in order to protect and manage its natural and cultural heritage, or to facilitate the development and management of approved commercial projects which directly benefit Gunditjmara people.
The travel and tourism industry will have security of tenure, profitable investment opportunities and the opportunity to provide authentic and memorable visitor experiences, within the context of a commitment to respecting culture and country and to maintaining the ecological and landscape values of the site.

All parties will respect the need for the Gunditjmara community to retain their privacy, to use their land for hunting, fishing and ceremony and to protect and hold private their sacred stories and sites.

The Budj Bim ‘concept’ will be based in the long term around a larger, more complex and integrated regional network of places and landscapes that are capable of expressing the Gunditjmara story from past to present.

The Gunditjmara people will look to complete the Budj Bim Landscape network through further land acquisition and complimentary land management practices on adjoining sites. The landscape network will be developed in order to achieve sustainable and integrated environmental and landscape systems, and to represent the full Gunditjmara story.

The compelling place narrative

Visitor experience in this isolated setting will be shaped by a narrative that ties together and explains the various elements that make up this place. That site narrative will be based around the story of the Budj Bim Landscape and the journey of the people who lived there – their unique relationship to the land. The story will be told in many parts, including creation of the Budj Bim landscape, adaptation of the landscape by the people who lived there, seasonal change, managing and harvesting the landscape, relationships with other indigenous people, invasion, war, dispossession, mission life, land rights and re-emergence as a living contemporary culture – the Place narrative must speak of the future.

The story will not be focussed on individual sites and artefacts. These elements are part of a larger story that must be told in different places within the landscape network – in the places where events happened or in the places that best express elements of the story.

The Site Planning Framework

Budj Bim is a large landscape network with a range of access points and visitor destinations. The network requires a planning ‘structure’ that supports site development, tourism product development, marketing and visitor orientation. The site planning framework is based on the following elements.

Road corridors – are main roads passing through the Budj Bim landscape network. Main road and trail systems will provide visitors with their first impression of the Budj Bim Landscape and are an opportunity to engage visitors and provide a first level of site interpretation.

Precincts – are areas that have a number of interrelated sites and attractions. Each precinct will provide a suite of visitor experiences with unique points of difference within a geographical setting. Sites – are visitor destinations with specific features, infrastructure and visitor experiences. Visitors are likely to go to a series of sites as part of their Budj Bim experience.

Hubs – are developed tourism nodes (focal points) within sites. Two Hub locations have been identified, Lake Surprise and Lake Condah. These locations provide essential services and commercial uses that support visitor use within a Precinct (not every precinct has a hub).

Off-site tourism destinations – these are regional destinations (nature-based and cultural heritage settings) that are integral to understanding the Budj Bim story and the culture of the Gunditjmara people.

Future Use Opportunities

The Master Plan develops a range of integrated site uses and facilities.

Day Use Facilities

Improvements to day use facilities are suggested for all key sites. They will provide a low cost starting point for a range of Budj Bim tourism experiences and can be developed incrementally as funds allow. The level and capacity of facilities (level of service model) corresponds to the number and type of users.

Accommodation Uses

The Budj Bim Landscape presents strong opportunities for a range of accommodation types to meet the needs of a range of users. Accommodation is an important support other tourism activities and to increase the length of visitor stay.

Accommodation proposals are shown in settings that are likely to support a wide range of tourism activities and where the physical impacts and access requirements of accommodation can be appropriately managed. These are candidate sites only and are subject to further design development and approval by the land owners.

Access Facilities

Road and trail systems will provide functional access and a range of tourism activities for visitors. They also provide a specific way of seeing the landscape which adds value to site interpretation and to the quality of the visitor experience. Roads and trails are an attraction and an activity as much as a service.

Cultural Uses

The Budj Bim Landscape is defined by its cultural values and stories and these will form the basis of the visitor experience.

Education, Research & Training Uses

As a nationally important (and possible World Heritage) cultural heritage site, Budj Bim has the potential to be a centre for a range of formal education opportunities from primary school to tertiary education levels, along with research and cultural training.

Event & Festival Uses

The Budj Bim Landscape provides a range of settings that evoke stories of the land and Gunditjmara history. There is an opportunity to develop festivals or special events related to the landscape. These special events may be designed to coincide with the Aboriginal seasonal calendar or existing seasonal events such as the Heywood Wood, Wine and Roses Festival or the Port Fairy Folk Festival.

Support Uses

Food, beverage and retail sales offerings can support other site services and tourism products across the Budj Bim Landscape and provide a revenue stream that is independent of tour based products.
Moving Forward

Implementation Strategy

Analysis of Indigenous tourism product in Australia has identified a number of considerations for the successful development of the Budj Bim National Heritage Landscape:

- **Branding.** Development of a clear and effective brand for Budj Bim National Heritage Landscape is essential for growth in its tourism ventures.

- **The ‘slow build’ approach.** Existing visitor numbers, facilities and business management capacity are currently at very low levels that are incapable of sustaining significant commercial project development. There is a need to first build the visitor market through marketing and product development for key niche visitor segments.

- **Take a long view of the future.** The management and business ownership roles of the Gunditjmara community are likely to change over time as business capacity, training and experience meet market standards. The business model should facilitate this process.

- **Build the network you need.** There is a need to build the landscape network and site facilities over time (through further land acquisition and access changes) in order to meet a broader environmental, cultural and tourism agenda.

- **The way in which the Budj Bim story is told is important.** The story must personally engage people and be unique to the people and landscapes of this place.

- **Regional site networks.** The Budj Bim Landscape should function as an iconic destination within a region that provides other regional destinations as part of the tourism product.

- **Develop product range and capacity for change to meet market needs.** The product mix represented by the Master Plan must meet the needs of a range of market segments with a capacity for growth and adaptation to meet future market needs.

- **Investment in research and understanding preferences of target markets.** This will align Indigenous tourism products to visitor preferences, including demand for authentic nature-based and cultural experiences.

- **Targeted marketing to the key niche visitor segments.** This will provide reliable visitation throughout the year, improving the viability of tourism product. A marketing strategy will also build awareness of the destination and grow demand for product.

- **Performance assessment controls and audit.** It is essential that the monitoring of the number of visitors and visitor markets is undertaken. This will assist with future planning and development of Budj Bim.

- **Embracing digital media.** A digital media strategy needs to be considered for Budj Bim, this includes websites that are clear, multi-lingual smart phone applications, multi-lingual interpretation, but not to a level that is detrimental to unique quality of the visitor experience.

- **Professional and experienced staff.** Budj Bim needs to be service orientated. It is critical that staff at Budj Bim meet visitor expectations for service.

The staged development strategy

Given its long-term product potential, the Budj Bim landscape is ideally suited to target the broader visitors markets of the **Socially Aware Domestic Visitors and International Experience Seekers**, however immediate targeting of these markets without the availability of suitable tourism products and support facilities may jeopardise the establishment of Budj Bim as a key tourism icon and destination.

In order to target these broader visitor segments, the Budj Bim Masterplan proposes a staged process based on developing ‘**up the value chain**’ of tourism markets. Given the complexity and uncertainty of tourism development over a long period, the implementation strategy is guided by achieving target visitation levels for each development stage, rather than fixed timeframes. While the Masterplan actions are described on a stage by stage basis, the timing of individual projects may change in response to funding availability or market demand.

The overall approach is based on the following:

In the **short term**, Budj Bim will continue to target its existing visitor markets (education, special interest, business/cultural awareness tour visitors), while expanding into the self-drive and bus/coach tour market of the Great Ocean Road region. This will expand business and tourism experience within the Gunditjmara community (Budj Bim Tours) and through partnership arrangements with established tour providers through the management of guided-tours and day-use facilities.

The target visitation over a period of 0 to 5 years is approximately 56,000 visitors annually.

In the **medium term**, the Budj Bim Landscape will continue to expand in the niche visitor markets (education, special interest, business/cultural awareness tours and self-drive and bus/coach tour market) and broader experience seeker markets through development of various accommodation products. These initiatives will support increased business and tourism experience through development of overnight accommodation facilities. The establishment of the Budj Bim National Heritage Landscape as a World Heritage Site will enhance development, marketing and branding initiatives.

The target visitation over a period of 5 to 15 years is approximately 86,000 visitors annually.

In the **long term**, the Budj Bim Landscape will be identified as a World Heritage site with established business and tourism networks and a mature range of tourism products. This status will support a larger number Domestic Socially Aware visitors and International Experience Seekers and the full establishment of Budj Bim as a national tourism icon.

Subject to further land acquisition and accommodation development, there is potential for a long term visitation level of more than 150,000 visitors annually.

Building partnerships and business networks

Many of the new services and activities proposed in the Masterplan will be delivered and managed by the private sector, working with the Gunditjmara community, or through a range of government and community funded initiatives.

Gunditjmara Mirring Traditional Owners Aboriginal Corporation will establish business relationships with tour operators, regional tourism organisations, visitor centres, marketing networks and other complimentary tourism businesses. These business networks will generate and support stable levels of visitation through marketing and joint-venture agreements. These partnership based projects may potentially identify project priorities within the overall Masterplan framework.

Recent changes to legislation now allow for a wider range of private sector investment in Victorian National Parks. Government, through the land management agencies, can take the lead in facilitating an EOI process to secure investment for quality accommodation identified within the Budj Bim landscape at Lake Surprise in stage two and three. This is consistent with the need to secure high quality tourism investment outcomes.
Build a better landscape network over time

The Budj Bim Landscape network is currently a series of isolated sites with limited access and infrastructure. Over time there is potential to build the landscape network through further land acquisition and access changes. A larger and more integrated site network will allow for environmental improvements and a more diverse range of visitor experiences, tour products and facility options, including high level accommodation options. These possible changes are not reflected on the current Masterplan.

Business Feasibility

Project Costs

The priority for available resources is to invest in those things that will enable and support visitor activity and environmental conservation within the Budj Bim Landscape by establishing key infrastructure and services such as vehicle access, boardwalks and interpretations. These facilities are likely to start small and expand in scale and complexity over time as visitor numbers and visitor needs change.

Costs - Benefits Analysis – Stage 1 & Stage 2

Analysis of the estimated construction costs and total economic impact of additional visitor expenditure for Stage 1 ($1.64M) and Stage 2 ($3.68M) and the Net Present Value (NPV) of Net Economic Benefits over a 30 year period indicates that Stage 1 and Stage 2 developments will achieve a positive NPV at Year 16.

The data employs an 8% discount rate for a 30 year Net Present Value analysis. The cost benefit analysis indicates that over the timeframe. The analysis indicates that the economic benefits to Budj Bim National Heritage Landscape and surrounding regions, exceed the capital expenditure costs of Stage 1 and Stage 2 infrastructure developments; as such, it is recommended that Stage 1 and Stage 2 developments proceed for development.

Stage 3 will be determined by long-term market trends, land acquisition activities and completion of the extensive prerequisites of infrastructure and strategic development items, beyond the scope of near term financial assessments. It is proposed that financial analysis of Stage 3 is undertaken at the end of Stage 2.

Tourism Development Funding

Stage 1 and Stage 2 tourism developments represent a number of public infrastructure investments, and will depend primarily on external grant funding. It is envisioned that accommodation developments in Stage 2 and Stage 3 will be developed through a joint venture partnership or lease-hold arrangement; this will limit exposure to financial risk, whilst maintaining the financial sustainability of the Heritage Landscape and expanding employment opportunities for the Gunditjmara.

Employment Impact

Urban Enterprise has undertaken an employment impact analysis of the forecasted visitor expenditure increases and flow-on economic benefits. Key findings suggest:

- The economic benefits of increase visitor expenditure from Stage 1, is estimated to support over 5 full-time equivalent (FTE) annual jobs on the Budj Bim landscape and surrounding regions.
- The economic benefits of increase visitor expenditure from Stage 2, is estimated to support over 15 full-time equivalent (FTE) annual jobs on the Budj Bim landscape and surrounding regions.
- The economic benefits of increase visitor expenditure from Stage 3, are not calculated at this stage, but subject to the scope of long term development are likely to support significantly more full-time equivalent (FTE) annual jobs on the Budj Bim landscape and surrounding regions.

Management Systems

Business Model

Business development within the Gunditjmara community and the south west region is a key outcome of the Masterplan. The recommendation of the Masterplan is that a separate business unit with a Manager and allocated staff will be developed within WMAC or GOMTOAC organisations.

All staff positions and business establishment costs will require an initial period of external funding (several years) to the point where the tour business is financially self-sustaining.

Budj Bim Tours Business Manager

The recommended management model requires a Budj Bim Tours Business Manager who could be employed by Budj Bim Tours Pty Ltd to work with tour operator/s and the Gunditjmara community to develop detailed tour products, visitor experiences and site access policies that meet the needs of the Community and Tour Operators.

Tour Guides

Tour Guides will be the face of the Gunditjmara Community and an integral component of the tour product and therefore the visitor experience. This is seen to be a specialist role, not a part time secondary or ad-hoc role.

Proposed Tour Management Model

The recommended tour management model is based on a system where general tour services are initially provided by a range of selected and licensed private tour companies, with Budj Bim Tours Pty Ltd providing specialist contract staff to conduct cultural heritage interpretation and other services.
Tyrendarra IPA

These works will establish the location as a tour ‘starting point’ and a place that provides an overview of the Budj Bim concept with special themes relating to wetland ecology, food gathering and settlement stories. This is a place that could support short duration tour products and special events.

6 New curvilinear elevated deck system to access key viewing and interpretations points, including the wetland edge ($150,000)

7 New main visitor arrival space on both sides of Darlot Creek containing a modular based unit (raised on deck structure) including shelter / pergola structure / toilet / drinking water / interpretations features. ($150,000)

8 Site interpretations. ($50,000)

Tyrendarra Township

These works will establish the township as a starting point for a tour of Budj Bim Landscape and provide a visual market for the location.

5 Highway signage will identify the Ettrick-Condah Road as a major tourist access route and part of the ‘Budj Bim Loop’ tourist drive. ($40,000)

15 Provide regional tourism and Budj Bim related orientation information and basic interpretations will be provided within the arrival facility displays. ($30,000)

16 Retain the existing reserve access road, but with a modified layout to accommodate car / coach parking arrangements at the visitor arrival point (north of the tennis courts). ($50,000)

17 New visitor arrival space containing a modular based unit (raised on deck structure) including shelter / pergola structure / BBQ & picnic facility / drinking water / interpretations features. Existing sports facility toilets may be used by visitors (to be confirmed) or additional toilets provided. ($200,000)

Convincing Ground

These works will establish the location as a place that represents military and social conflict and the wider settlement history.

18 Provide interpretations signage and parking at the arrival point. ($30,000)

Based on the indicative project costs, the total for priority stage 1 works (not total stage 1 works) would be around $1,380,000. Note that project costs are for priority Stage 1 works only. Additional costs may be added in later stages to improve the quality and capacity of the infrastructure.
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1.0 Budj Bim Master Plan

A Vision For The Future

The Budj Bim landscape is a unique place with universal heritage based values that demonstrate how Gunditjmara people worked with the natural resources and environment of the Victorian south west region to establish a permanent place of human society over the past 30,000 years and beyond.

The story of the Gunditjmara people and the Budj Bim landscape is not limited to the existing Heritage Listed landscape sites. Gunditjmara law men could stand on the top of Budj Bim and see the path of the creator beings from the Serra Range and Mt Abrupt (Grampians), to Mt Napier and south to the Cape Bridgewater coast and Deen Maar (Lady Julia Percy Island), the final resting place of the spirits of Gunditjmara people. Every aspect of the landscape had cultural meaning, a sense of purpose and a role in the lives of the Gunditjmara people.

This Master Plan project is not just concerned with the management of sites and artefacts, the commemoration of history or the development of nature based tourism activities. It is also concerned with understanding and interpreting a unique system of values, a way of thinking about people and place, and it is about seeing the land as a part of a contemporary living culture.

The painter Lucien Freud wrote that 'for a painting to move us, it must do more than merely remind us of life, it must acquire a life all its own. It must have vitality and intimacy and let us see something about the inner lives of the people concerned'.

The focus of the Master Plan is on the development of sustainable tourism opportunities within the Budj Bim Landscape in a manner that is consistent with Gunditjmara values and economic objectives. For tourism to be sustainable in this setting it must encompass a wider vision that considers environmental sustainability and land rehabilitation, it must engage visitors and provide a way of seeing the landscape through Gunditjmara eyes and understanding and engaging with their story – their journey through time. The visitor experience must be unique, intimate and emotional – this will be its point of difference.

Budj Bim will become a significant tourism destination. It will be seen as an 'iconic' Aboriginal place with the same status as Uluru, Kakadu and other landscapes of national indigenous cultural heritage importance, but it will provide different experiences to those places and a unique story.

1.1 The Purpose Of The Master Plan

The Master Plan has been prepared for the Gunditj Mirring Traditional Owners Aboriginal Corporation. It presents a vision for the conservation and sustainable use of the landscape for cultural, tourism and community purposes, along with a range of potential infrastructure works that will enhance business potential and investment attraction of the setting, and provide a nationally significant visitor experience in the region. The Budj Bim Master Plan also provides an opportunity to increase the capacity of the local Gunditjmara community to manage nature-based tourism assets and provide management and employment opportunities.

As a planning document, the Master Plan is a distillation of existing management plans and new ideas. It is not intended to provide detailed site design or to define every site use, tour product or commercial opportunity that the Gunditjmara community or tourism industry may ultimately realise. The scale and schematic nature of the concepts provided reflects this approach.

The Budj Bim landscape over recent years has been the focus of a range of technical studies that considered conservation, archaeology, tourism planning, business development and Gunditjmara community use. This Master Plan draws together these findings and presents a strategic vision for the Budj Bim landscape based on the conservation and sustainable use of the landscape for cultural, tourism and community purposes. This vision will inform subsequent detailed business development, site planning, site management and decision making.

This Master Plan will be subject to review and updating as required by the Gunditj Mirring Traditional Owners Aboriginal Corporation (GMTOAC) and the Budj Bim Council (Co-Management Authority). Future research and site monitoring will also contribute to the review of the Master Plan, together with ongoing consultation with the Gunditjmara community and the tourism industry.
Figure 01. National Heritage Landscape Location
2.1 The Budj Bim National Heritage Landscape

The Budj Bim National Heritage Landscape is located in south-west Victoria and refers to the landscape created by the eruption of Budj Bim (Mt Eccles) around 30,000 years ago. The lava flow from Mt Eccles to the sea blocked the path of creeks and created large lakes and wetlands which were central to the lives of the Gunditjmara people.

For many thousands of years, the Gunditjmara people developed an extensive aquaculture system along the lava flow through the use of engineered fish and eel traps, channels and weirs, along with villages made up of clusters of circular stone huts. These permanent settlements represent the highest level of settlement development and engineering skill within Aboriginal archaeological sites in Australia and dispel the myth that Australia's Indigenous people were all nomadic. Recent archaeological evidence suggests the aquaculture system is one of the oldest in the world.

With European settlement in the 1830s came conflict. Gunditjmara people fought for their land during the Eumerella wars, which lasted more than 20 years. As this conflict drew to an end in the 1860s, many Aboriginal people were displaced and the Victorian government began to develop reserves to house them. Many Aboriginal people refused to move from their ancestral land and eventually the government agreed to build a mission at Lake Condah, close to some of the eel traps and within sight of Budj Bim (Mt Eccles). The mission was destroyed by the government in the 1950s in an effort to force the integration of Gunditjmara people with the general community but the Gunditjmara people continued to live in the area and protect their heritage. The mission lands were returned to the Gunditjmara in 1987.

In 2004, the Australian Government officially declared and listed the Mt Eccles National Park, Lake Condah and several other Aboriginal community owned properties as the Budj Bim National Heritage Landscape, with the support of the Victorian Government. There are currently nominations to add two additional Aboriginal community owned properties to the national heritage listing. Several properties have been declared Indigenous Protected Areas (IPA) since 2003 including Tyrendarra, Kurtonitj and Lake Condah.

The listed cultural heritage landscape covers around 100 square kilometres. The Budj Bim National Heritage Landscape also contains rare geological features, including lava tubes and is home to many threatened species of flora and fauna such as the Tiger Quoll.

The Budj Bim landscape is a unique place with universal heritage based values that demonstrate how Gunditjmara people worked with the natural resources and environment to establish a permanent place of human society over the past 30,000 years. The traditional aquaculture systems were recently proclaimed as a national engineering landmark by Engineers Australia in October 2011. A world heritage nomination for the Budj Bim National Heritage Landscape is currently being developed through a community-based partnership for consideration by the Victorian and Australian governments.

Gunditjmara culture continues to develop and find expression through their relationship with the land and by community activities. The Budj Bim Landscape is a living part of the Gunditjmara community.

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**Figure 02. Budj Bim National Heritage Landscape**

Source: The People of Budj Bim (Gunditjmara people with Gib Wettenhall, 2010)

**Figure 03. Culturally Significant Features**

Source: The People of Budj Bim (Gunditjmara people with Gib Wettenhall, 2010)
2.2 Significance

Cultural Heritage Significance

The Budj Bim Landscape was included on the National Heritage List (NHL) on 20th July 2004 because of its outstanding cultural heritage importance to the nation and was the first Indigenous place to be included on the NHL. The significance of the Budj Bim landscape is represented by the following themes.

Indigenous tradition

The story of the Gunditjmara people of South West Victoria is intimately related to the volcanic eruption of Mount Eccles from around 30,000 years ago, when an ancestral creation-being revealed himself in the landscape. The link between the eruption of the volcano and the development of the Budj Bim story is of outstanding heritage value as a demonstration of the process through which ancestral beings reveal themselves in the landscape and become an intrinsic part of the culture of a people.

Sophisticated Aquaculture Systems

The lava flow from Mount Eccles changed the drainage pattern in the area, creating large wetlands.

Beginning thousands of years ago, the Gunditjmara people developed this landscape through the construction of an ingenious system of channels, fish traps and weirs which provided ideal conditions for growing and harvesting eels and other fish. This system of fish husbandry is markedly different from freshwater fish traps recorded in other parts of Australia and demonstrates a transition from a forager society to a society that practiced husbandry of fresh water fish.

This adaptation of the landscape resulted in high population densities, represented by the remains of stone huts clustered into villages and provided the economic base for a stratified society ruled by chiefs with a form of hereditary succession to this office. Unlike other places, the Budj Bim Landscape contains all the elements that demonstrate the functioning of this system. These technical systems are of world importance.

Defending Country

The landscape of the Tyrendarra lava flow provides a particularly clear example of the way that Aboriginal people used their environment for defence, both as a base for launching attacks on European settlers and a means of escaping reprisal raids during frontier conflicts.

Native Title

The Lake Condah Mission is of outstanding heritage value because of the legal process under which it was returned to the community. It is a rare example of an Aboriginal community pursuing their rights to land through legal process and the Commonwealth using its constitutional powers to provide benefits for a specific Aboriginal community.

Living Culture

The Gunditjmara people are a living community with continuous links to the Budj Bim Landscape – a place with at least 6,000 years of cultural history told through the landscape and the stories of the people who still live there.

Environmental Significance

The Budj Bim National Heritage Landscape is classified at state and national level for a range of environmental values.

Geomorphology

- Budj Bim is part of the ‘Eccles’ Volcanic landform, geologically known as the Tyrendarra Flow, which formed as a result of the eruption of Mt Eccles approximately 27,000 – 30,000 years ago. The eruption substantially altered the landscape resulting in the formation of the alluvial wetlands and ‘stony rises’ that characterise the environment today. Lake Condah itself was probably formed about 8,000 years ago as a result of the basalt flow impounding the flow of the Darlot Creek and Condah Swamp outfall. Gunditjmara people witnessed the explosion of Eccles and knew it to be the revelation of an important Creation Ancestor.

- The Tyrendarra Flow is considered of national conservation significance for its volcanic geomorphology and is listed on the National Heritage List under Criterion I – Importance as part of Indigenous Tradition (in reference to the revelation of the Creation Ancestor).

- Although not listed as part of the Budj Bim National Heritage Landscape, the landscape is spiritually connected to Mt Napier and to Deen Maar Island (Lady Julia Percy Island) which is central to Gunditjmara creation stories and cultural tradition.

Flora & Fauna

- The dominant dryland community is the Stony Rises Manna Gum Woodland which is considered to be of national conservation significance due to its intactness and notable lack of species diversity (heavily dominated by Manna Gums).

- Twenty species of rare, endangered or vulnerable plants are found on the Tyrendarra flow.

- Darlot Creek is home to a number of Indigenous fish species, including the short-finned eel.

- Lake Condah is the only part of Budj Bim whose flora and fauna communities are well documented. Lake Condah’s fauna is considered of State Significance against National Estate Criteria with a high level of species diversity and some species listed as threatened in Victoria. The area is thought to be one of the last strongholds of the Tiger Quoll and provides habitat to a number of threatened bird species.

- Herbfield communities associated with the bed and margins of Lake Condah are of potential State Significance.

- Twenty species of rare, endangered or vulnerable plants are found on the Tyrendarra flow.

UNESCO World Heritage Listing

The Gunditjmara people intend to pursue world heritage listing for the area now referred to as the Budj Bim National Heritage Landscape. As a listed National Heritage Landscape and potential World Heritage Site, and a landscape with a range of national conservation significance values, any proposed infrastructure and development changes will be subject to the EPBC Act and related application and approval processes.
2.3 Community & Stakeholder Consultation

Consultation with the Gunditjmara community and key stakeholders suggest that there is strong support for the concept of developing sustainable tourism within the Budj Bim Landscape, but that development and use of the landscape must be based on a set of principles that recognise the special nature of the place and the rights and needs of the Gunditjmara community.

The Aboriginal community felt that sustainable tourism for their country should encompass the following principles:

- Tourism should assist the Gunditjmara community to sustain and protect their culture, and to maintain the wellbeing of individuals and their families.
- Sustainable tourism is considered a step toward a greater vision, not the end goal. That greater vision for Budj Bim includes the healing and restoration of the land and sustaining Gunditjmara culture.
- Tourism should be about country and provide guests with an experience of Budj Bim country.
- People coming to country will be welcomed and treated as guests rather than visitors or tourists. It should be a personal and engaging experience.
- Community members will bring their own personal stories to tourism activities rather than a generic representation of Gunditjmara stories.
- The tourism business will develop a range of different products and experiences for guests that target different markets.
- Guests will learn from their experience.
- Environmental and tourism impacts will be managed in a way that respects the landscape.
- Tourism will be sustainable and tourism ventures will be sustained and grow over a long period of time.
- Tourism will respect and sustain culture and cultural practices and help to promote their continuing practice with future generations.
- Tourism should result in sustainable employment that will produce ongoing community employment and enough money to make a living and create wealth without damaging the site resource.

Community aspirations for the development of sustainable tourism within the Budj Bim landscape:

- Something we can do and be confident of: There is a strong desire for project outcomes that can realistically be undertaken or managed by the community and which the community can be confident will lead to success.
- On our own terms: Tourism will need to be developed in a way that is consistent with ways in which the community wishes to work.
- A quick response: The community is keen to see some quick results.
- Projects must demonstrate that we are a strong industry: Strong tourism businesses will be established that can be viewed as role models by the tourism industry and by other Indigenous communities.
- Recognition in Heywood: Through the tourism project, Winda Mara Aboriginal Corporation and the Gunditj Mirring Traditional Owners Aboriginal Corporation will be recognised in Heywood as providing significant community benefit and contributing to the development of a strong community.
- Capacity to deliver: Business will be developed that the community has the capacity to deliver.

2.4 The Indigenous Tourism Opportunity

Indigenous tourism is a key segment of the Australian tourism market and an emerging growth sector.

In 2009, spending by Indigenous tourism related visitors was valued at $7.2 billion, representing 12% of total visitor expenditure in Australia. Tourism Australia has identified Indigenous tourism as one of the seven key experiences which underpin Australia’s global marketing activities.

The Australian Government’s 2009 National Long Term Tourism Strategy identifies that in order for Australia to remain competitive in the Global tourism market; continued investment is required to deliver quality sustainable tourism product and services that provide visitors with compelling tourist experiences.

In the year ending 30th June 2012, an estimated 69,800 international visitors to Victoria participated in a local Aboriginal experience while in the state. Victoria’s market share of international Aboriginal tourism visitors is estimated to be 9.3% of overall visitors. This relatively low base provides a great opportunity for Aboriginal tourism to increase its economic contribution to the state and to provide authentic and place specific visitor experiences in an increasingly crowded tourism market.

The Budj Bim National Heritage Landscape falls within the Great Ocean Road tourism region, one of ten regions in Australia considered a ‘nationally significant landscape’. This program was developed to provide a long term strategic approach to tourism and conservation and to highlight Australia’s most outstanding natural and cultural environments.

The Budj Bim National Heritage Landscape is part of an emerging Indigenous tourism sector. It provides a unique point of difference within the Victorian and national tourism market and an important opportunity for the Gunditjmara community to maintain and rehabilitate the land, develop economic independence, jobs, cultural protection and connection to country.
3.0 Context & Analysis

3.1 Gunditjmara Country
The story of the Gunditjmara people and the Budj Bim landscape is not limited to the Heritage Listed landscape sites. Gunditjmara law men could stand on the top of Budj Bim (Mt Eccles) and see the path of the creator beings from the Serra Range and Mt Abrupt (Grampians), to Mt Napier and south to the Cape Bridgewater coast and Deen Maar (Lady Julia Percy Island), the final resting place of the spirits of Gunditjmara people. Every aspect of the landscape had cultural meaning and a role in the lives of the Gunditjmara people.

Gunditjmara culture, language, trading activities and stories extended over a wide geographical range but focussed within the land bounded by the Glenelg, Wannon and Hopkins Rivers and extended to the coastal area beyond the shoreline. The land that is represented within the Budj Bim National Heritage Landscape is part of a larger cultural region. Gunditjmara stories and the visitor experience must therefore connect to other regional sites including the Convincing Ground (Allestree coast), Mount Napier, Tower Hill and the Tyrendarra coastline.

3.2 Land Ownership & Management
The Budj Bim Landscape is represented by a series of sites owned by the state and by the Traditional Owners. The Gunditjmara community manage the indigenous heritage values of the Budj Bim National Heritage Landscape and related Indigenous Protected Area (IPA) sites through the Winda Mara Aboriginal Corporation and Gunditj Mirring Traditional Owners Aboriginal Corporation (RNTBC).

A large part of the current Budj Bim National Heritage Landscape area is the Mount Eccles National Park (Budj Bim National Park) which is owned by the State and managed through a Co-Management Model between Parks Victoria and the Gunditjmara community.

The boundary of the proposed World Heritage area is still to be determined.
Figure 07. Gunditjmara Cultural Boundaries

Figure 08. Regional Land Ownership & Management
3.3 Government Policy & Programs

Tourism Policy & Planning

The Budj Bim Landscape is identified in state and commonwealth government strategic tourism planning programs as an important flagship site for Indigenous tourism at a state and national level.

Victorian Aboriginal Economic Strategy 2013-2020

The Economic Strategy will support economic, business and social development initiatives that will directly benefit the Gunditjmara community at all levels. The Budj Bim Master Plan framework will provide an ideal example of a ‘Landmark Project’ and an organisational model, regional network and project area that meets the listed criteria, which should help to leverage support from a range of support programs and potential investors.

Victoria’s Aboriginal Tourism Development Plan 2013-2013

Budj Bim is acknowledged within the Development Plan as a potentially iconic tourism destination and the Development Plan is likely to promote the outcomes suggested in the Master Plan.

National Indigenous Tourism Product Manual 3rd Ed

The current Budj Bim Tours business meets some of the ‘market ready’ characteristics, but not the ‘export ready’ characteristics (which are addressed through this Master Plan). The criteria defined within the Manual highlight the need for the Budj Bim Master Plan outcomes and relate to business planning, development and management issues. Organisation, marketing and monitoring of the business are key elements.

Victoria’s Nature Based Tourism Strategy 2008 – 2012

The strategy aims to establish a range of sustainable, high quality nature based experiences which will provide visitors with memorable experiences and also bring economic benefits to communities. It encourages public – private partnerships in investment for tourism initiatives that will directly benefit the Gunditjmara community at all levels.


These policies support development on Crown Land and provide new land use planning and management strategies that enable or enhance private sector investment in new tourism facilities and services.

The Tourism Investment Opportunities of Significance in National Parks guidelines 2013 are structured to respond to developer initiated approaches for significant, large scale proposals to government rather than government initiated proposals. A framework for allocation of rights on public land will support the implementation of the guidelines and apply to a broader range of tourism investment opportunities on public land. Government initiated proposals will be dealt with via a competitive process and will specify the site, conditions, rental and lease duration prior to going to market.

Other programs

The Budj Bim Landscape has recently been earmarked for the promotion and Development of high quality Aboriginal cultural tourism experiences by the Victorian Government through the Advancing Country Towns Program for the Heywood and Lake Condah district.

- The National Landscapes Program for tourism and conservation (Commonwealth Government).
- Local governments in the south-west of Victoria through the Great South Coast Regional Strategic Plan 6.

Funding and support programs

Regional Growth Fund

The RGF has a number of funding programs that could support eligible future Budj Bim Landscape works, particularly in the area of infrastructure development.

Indigenous Business Australia

These programs are directly applicable to the Budj Bim Master Plan outcomes and relate to business planning, development and support.

Indigenous Land Corporation

The ILC is a possible avenue for the funding of additional land purchases for the Budj Bim Landscape where the cultural heritage value of the land and its relationship to the Gunditjmara people can be clearly established.

3.4 Existing Site Planning & Management Studies

The following documents have influenced recent development and management decisions relating to the Budj Bim Landscape and inform the Master Plan.

Ngootyoong Gunditj Ngootyoong Mara South West Management Plan (DEPI Draft 2013)

The Draft Ngootyoong Gunditj Ngootyoong Mara South West Management Plan is a strategic guide for managing and protecting the parks, reserves and Indigenous Protected Areas of south-west Victoria. The project is a partnership between Gunditj Mirring Traditional Owners Aboriginal Corporation (GTMOAC), Winda Mara Aboriginal Corporation (WMAC), Parks Victoria and the Department of Environment and Primary Industries (DEPI). The Management Plan was issued as a consultation draft in March 2013.

The vision, goals and strategies are intended to outline a practical approach that recognises both the purpose of the parks and reserves and the Gunditjmara Traditional Owners role in managing these special areas. Parks Victoria, the Gunditjmara Traditional Owners, The Budj Bim Council and DEPI will use the plan to direct future management through:

- Implementation Plans (sub-regional areas), which establish detailed strategies, actions and targets required to implement Management Plan outcomes over a 5 year timeframe.
- Action Plans (individual parks), which list planned works and funding allocations for the current financial year.
- The Budj Bim Master Plan will sit beside the South West Management Plan and influence both the Implementation and Action Plans.

The Lake Condah Sustainable Development Project / Sustainable Development Partnership (WMAC)

This project is facilitated by WMAC and state government. The project is concerned with the ongoing World Heritage listing nomination process. Listing of the site, when and if it occurs, is likely to generate more specific land management and monitoring requirements, along with tourism management practices. The listing nomination process is ongoing.

Budj Bim Sustainable Tourism Plan (Context 2007)

The Plan focussed on the Mount Eccles, Lake Condah and Tyrendarra places as they were in 2007 and did not consider potential long term change to the Budj Bim Landscape. The focus of the project was on self-contained tourism development projects that could be achieved by the Gunditjmara community through grant based funding programs and internal resources. A number of these projects have been completed.
The Gunditj Mirring Place Project (GMTOAC)

This project developed the concept of an administrative and cultural centre and Keeping Place for the Gunditjmara Community based at the Lake Condah Mission site. Other than business related contact, this place will generally not cater to tourism or public visits, although other parts of the Mission site are likely to support guided tourism and seasonal events. The Gunditj Mirring Place Project is currently entering the design and construction phase.

Project Feasibility and Market Demand Study for NBT Accommodation 2010 (Jones, Lang LaSalle Hotels)

This report assesses the feasibility of various tourist accommodation options on an area of privately owned land west of Lake Surprise that is surrounded by the Mt Eccles National Park.

Budj Bim Landscape Accommodation Feasibility Study (Insight Communications & Street Ryan Associates 2013)

This report also assesses the feasibility of various tourist accommodation options on the same privately owned site west of Lake Surprise.


This study investigates options and business feasibility for the development of an aquaculture business within the Lake Condah area.

Budj Bim Tours Business Plan 2010 – 2015 (Insight Communications and Street Ryan Associates 2013)

The Business Plan provides a sustainable business model for the Budj Bim Tours business.

Tours of the Budj Bim Landscape Feasibility Study (Insight Communications and Street Ryan Associates 2013)

This project reviews the previous Budj Bim Tours Company Business Plan 2010 – 2015 to consider other tourism business models and to determine the feasibility of licensing external tour operators to deliver appropriate tour products to the Aboriginal community-owned properties within the Budj Bim Landscape.

3.5 Town Planning Framework

The study area is split between the two Local Government Areas of Glenelg and Moine Shire Councils. The study area comprises nine properties which are each subject to the land use controls summarised in the following table.

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*PCRZ: Public Conservation Resource Zone; FZ: Farming Zone; SUZ: Special Use Zone

Heritage Controls

The Budj Bim National Heritage Landscape is listed by the Commonwealth government.

National Heritage places are matters of national environmental significance protected by the Environment Protection and Biodiversity Conservation Act 1999 (EPBC Act). If a National Heritage place is on state, self-governed territory or private land, the values are protected to the full extent of the Australian Governments constitutional powers.

In the case of places with Indigenous heritage values in the National Heritage List, the Australian Government has the power to protect them irrespective of land tenure. In other cases, the value of places may be protected under state legislation (through a bilateral agreement) or by private owners under a conservation agreement with the Australian Government.

Policies & Controls

Planning for the Budj Bim Landscape is controlled by the Planning & Environment Act 1987 and the Victorian Planning Provisions. Future use and works will be subject to relevant local government statutory controls and policy.

In 2013 the Victorian Government introduced a suite of reformed planning zones for Victoria. The changes involve the removal or amendment of some existing zones and the introduction of new zones. With respect to the current study area, the Special Use Zone and Public Conservation Recreation Zone are unchanged; however, the Farming Zone has been modified along with a number of other rural zones. The purpose of the proposed changes to the rural zones is to provide greater flexibility for use and development by making more agricultural uses and complementary retail uses ‘as of right’ (meaning no permit is required for the use of the land). It is intended that the changes will facilitate greater opportunities for rural tourism as commercial uses will no longer require agricultural grounding (a direct link to the agricultural activity).
Future Planning & Development Facilitation

The Budj Bim National Heritage Landscape and related sites are subject to a number of zone and overlay provisions, making the process of seeking planning approval for the use and development of the land potentially more complex and time consuming. Given the complexities associated with the study area containing both privately and publicly owned land with varying planning controls, the Master Plan recommendation is that:

- Areas of the Mt Eccles National Park not already zoned Public Conservation Resource Zone (PCRZ) and not subject to SUZ changes should be rezoned from Farming Zone (FZ) to PCRZ to reflect its status as a National Park.
- Precincts within the Mt Eccles National Park, and other sites owned by the GMTOAC and WMAC that are proposed to contain future NBT development, are considered for rezoning to the Special Use Zone (SUZ), with appropriate Schedule controls matched to the proposed long term Master Plan outcomes. This approach would provide a level of certainty to current and future investors, while allowing the land owners to maintain appropriate control of future land use and development. Schedule controls could be modified as required to meet future Master Plan changes.
- A Pre-application Process will be developed to assist applicant proposals, Responsible Authorities and land owners. This process will provide a simple checklist that can be used by all parties to ensure that planning applications are complete and meet the special requirements of the landscape and the Gunditjmara community.

![Figure 11. Proposed Project Pre-Application Process](image-url)
3.6 Landscape Analysis - The Overall Budj Bim Landscape

The following factors are likely to affect site opportunities, land management initiatives and the nature and quality of the visitor experience.

Understanding the ‘Budj Bim’ concept - different stories in different places

The Budj Bim landscape generally refers to what is known as the Tyrendarra lava flow – the 50km lava flow arc (15km offshore) that extends south east from Mt Eccles (refer to Figure 2 and Section 2.1), but the cultural meaning of the term is far richer.

The publication *The People of Budj Bim*, the Gunditjmara people with Gib Wettenhall (em PRESS Publishing 2010) describes the creation of Budj Bim.

\textit{At the dawn of time, it was the ancestral beings – part human, part beast – who brought what was previously barren land to life. At the end of their dreaming journeys, the ancestral beings left aspects of themselves behind transformed into part of the landscape. To the Gunditjmara people, Budj Bim’s domed hill represents the forehead of one such being, with the lava spat out as the head burst through the earth forming his teeth. In the Dhauwurd wurrung language, budj bim means “high head” and tung att means “teeth belonging to it”, referring to the scattered red scoria”. (p7)}

For a visitor to appreciate the physical and spiritual elements of the Budj Bim concept, they must see the places and the landscapes that relate to the stories. This is a landscape that must be explained in different places and in different ways. The method of site interpretation must be driven by story and landscapes, not through archaeological sites and stone artefacts alone.

The Budj Bim landscape is incomplete

The stories related to the Budj Bim Landscape relate to a range of places that have meaning for the Gunditjmara people – settlements, cultural places, locations linked to harvesting of the landscape and to historical events. Places with permanent water and large food sources were typically the location for larger permanent settlements and many of these major sites now form the basis of the Budj Bim National Heritage Landscape, including:

- Lake Gorrie (Eumeralla River / Eumeralla Swamp)
- Allambie (Condah Swamp)
- Kurtonij (the area between east and west channels of Darlot Creek)
- Tyrendarra (Homerton Swamp / Darlot Creek / Fitzroy River)

\textbf{Figure 12.} Budj Bim Landscape – Existing Sites
Other places that are an intrinsic part of the Gunditjmara story are not represented within the current reserve network, including:

- Condah Swamp north of Allambie
- Whittlebury Swamp
- Tyrendarra coastal region (the area south of the Tyrendarra IPA)
- Deen Maar and the offshore marine environment

These sites are a part of the Budj Bim Landscape. Over the long term, where possible, these sites should be represented within an expanded and integrated Budj Bim Landscape network as well as through interpretation.

Environmental sustainability is essential

The Budj Bim Landscape is a part of a regional landscape that is defined by a series of natural systems:

- **Volcanic Features** – caves, cones, tumuli, craters, barriers, lava channels, lava caves, eruption points and stony rises which are features of international and national significance. The Byaduk Caves are recognised as the most extensive and accessible lava caves in Australia.
- **Volcanic plains landscape** – plains, wetlands, stony rises and other features that are characteristic of recent volcanic activity on Victoria’s western plains.
- **High diversity of faunal habitats** – supporting at least sixteen species of significant animals, eight of which are threatened fauna species including the Spotted-tailed Quoll, Brush-tailed Phascogale, Common Bentwing Bat, Striped Legless Lizard, four threatened plant species and seven regionally significant plant species.
- **Uncommon EVC types** – including the Manna Gum EVC type associated with the Budj Bim stony rise landscape type.

Based on information provided by the Victorian State Government, climate change is likely to have a range of impacts on Budj Bim environment. While there will always be some uncertainty over the precise scale and timing of climate change impacts, current climate change modelling suggests a warmer, drier and more extreme climate for Victoria in the future. The Budj Bim Landscape may be significantly affected by climate change in the long term and that these effects are likely to include:

- Changes to water levels and water quality within lakes and streams, leading to adverse effects on the aquatic ecosystems that depend on those systems, including eels and fish species. Many current Budj Bim aquatic systems depend on farming catchments that are not managed for conservation purposes.
- Possible changes to terrestrial ecosystems (flora, fauna and aquatic systems) as a result of temperature, rainfall changes and weed competition.

- A vulnerability to change that is increased in magnitude as a result of the small size and isolated nature of sites such as Kurtoni and Tyrendarra IPA, and the fragmentation of the overall Budj Bim site network.
- An increase in storm events, extreme weather patterns and climate variability that could result in physical damage to the landscape.
- Areas of coastal inundation within the lower reaches of the Fitzroy River system.
- Health effects on visitors and other users of the landscape due to more extreme climate and weather events.

The Budj Bim Landscape must function as a living landscape and an area that represents the essential qualities of the regional landscape. That system must be environmentally sustainable over the long term. For the Budj Bim Landscape to be sustainable as a cultural resource for the Gunditjmara people and a tourism destination, it must have long term and sustainable environmental systems that:

- Function as integrated environmental systems
- Have a size and sufficient buffer areas / capacity to ensure robustness and durability
- Allow for the effects of climate change

There is a wider gunditjmara cultural context

Three language groups occupied south-west Victoria (refer section 3.1). They shared language, creation stories, trade and cultural activities and they inter-married. The clan groups that comprised the Gunditjmara people occupied an area of the south-west that was significantly larger than the Budj Bim Landscape.

Budj Bim has the potential to be an iconic visitor destination and a focal point for cultural interpretation, but it should also be seen in the context of a wider regional Aboriginal culture. Places such as Gariwerd (Grampians National Park), Mt Napier and Tower Hill are part of a larger regional story that explains Gunditjmara culture and wider Aboriginal cultural patterns. There should be a coordinated approach to Aboriginal cultural tourism between these places to allow those stories to be told in a meaningful way.

To understand the Gunditjmara people and their culture and their way of life, visitors must see the larger picture and understand the complexity of Aboriginal culture at a regional level.

Landscape character and environmental quality are key parts of the budj bim experience

The Budj Bim Landscape has developed from a series of sites that have been acquired over time. The land that is included in the reserve system was used for agriculture or forestry and has lost many of its original physical features such as swamps, seasonal flood patterns, vegetation cover and surface rock cover that established the character of the landscape, the location of settlements and the unique culture and history of the place. The land also has remnant farming features and off site views that potentially distract visitors and devalue the ‘immersive’ site experience.

Landscape character and environmental quality help to explain the unique nature of the Budj Bim Landscape, the ways in which Gunditjmara people adapted to that landscape and events such as the Eumeralla Wars. These are qualities that form the basis of an immersive visitor experience – an experience that allows visitors to imagine the past and understand the stories.

Landscape character, visual quality and environmental quality must be seen as ‘artefacts’ in the same way as archaeological features. The restoration of the appearance and environmental function of landscape is an important initiative from a Gunditjmara cultural perspective and is a way of developing Budj Bim as a tourism destination that provides a distinctive and truly immersive visitor experience.

The budj bim landscape as a tourist destination is starting from a low infrastructure base

The Budj Bim Landscape is essentially a combination of rural landscape and environmental conservation areas with simple rural infrastructure. Most sites can’t currently be accessed by independent visitors in a 2WD vehicle and have a very low level of site infrastructure and interpretation. The existing visitor experience is typically limited in terms of complexity and quality.

If the story and the cultural heritage significance is of world importance, the quality of the visitor experience should match that standard. Budj Bim is more likely to engage visitors through a combination of carefully crafted and unique interpretive experiences across a range of settings, rather than through ‘spectacular’ landscapes or single ‘must see’ destinations.
Visual ‘legibility’ is a key part of the visitor experience

Road access in and around the Budj Bim network has been shaped by past land ownership patterns, farming uses, flood patterns and the location of stony rises, rather than by the specific needs of Budj Bim visitors. Visitors cannot travel ‘through’ the Budj Bim Landscape and those travelling between the major sites must travel away from the Landscape on public roads through arm areas before re-entering the Budj Bim Landscape at key locations. This results in a confusing experience for visitors who have no understanding of the shape and extent of the landscape or its relationship to key features such as the Darlot Creek.

Individual site access points are also a legacy of past land use. These gate access locations often place visitors in locations where they have to travel through a site to get to points of interest. This increases the impact of visitors on sites and often provides visitors with a lower quality experience.

The way in which visitors see the landscape and individual sites is important to their understanding of the landscape and the Budj Bim story. Developing a more integrated and site specific access system for the Budj Bim Landscape is an important component of any tourism development plan.

The Budj Bim Landscape has a number of roles to play

Budj Bim is an environmental reserve, a cultural homeland for the Gunditjmara people, a recreation resource and potentially, an iconic tourism destination. There will be competing and sometimes conflicting interests. Management and development of the Budj Bim Landscape system must be based on a value system that requires:

- Individual sites to have different capacities for use and priorities.
- A hierarchy of uses where sites will have dominant, secondary and excluded uses.
- Site use arrangements that provide certainty of use by the traditional owners and tourism providers or day users.

This is a changeable landscape

Budj Bim is subject to seasonal changes such as flooding which changes access patterns and the character of the landscape. Tyrendarra is closed for several months each year with flooding. This suggests that there is a need for alternative ways of seeing the landscape, different activities and experiences during different seasons.

3.7 Landscape Analysis - Key Sites

The Budj Bim Heritage Landscape is based on a series of key sites. Lake Surprise / Mt Eccles National Park and Tyrendarra are open to general public access and are also subject to escorted Budj Bim Tours. Other sites are generally restricted to tour access or long distance trail access. Each site has unique characteristics. Key analysis issues that are likely to shape future development initiatives include:

Lake Surprise & Mt Eccles National Park

The Lake Surprise camping and day visitor area is the major visitor destination and service location within Mt Eccles National Park and the most frequently visited location within the Budj Bim Landscape. Visitors mostly access the site from the Macarthur Road.

The current focus of the Lake Surprise site is on the scenic qualities of the location (crater lake views and walks), environmental conservation, simple interpretation for the Mt Eccles / Budj Bim landscape and for nature based recreation (camping, walking, mountain biking and 4WD). The site is designed to be a low volume day visitor destination with low cost / basic camping (22 sites) and well maintained day visitor facilities (BBQ/picnic). It generally functions as an isolated visitor destination or a stopping point within a regional tourism journey. The site is not designed to be a key setting within a nationally / internationally important cultural heritage landscape system, or to function as part of an integrated reserve system.

This is a place that can represent a number of elements of the Budj Bim story – particularly the volcanic and landscape creation stories. Future directions could include:

- Change the focus of the Lake Surprise site from a day use facility focussed on Mt Eccles National Park, to a higher order multipurpose facility and service hub that represents the Budj Bim Landscape.
- See Lake Surprise as both a key visitor destination and as the start of an interpretive ‘journey’ that takes in a number of key sites – a sequential experience that explains the nature of the landscape and the cultural story linked to that landscape.
- Pursue the long term acquisition of privately owned sites where the land acquisition would allow simpler and more direct road access, improved park services, environmental buffering or landscape rehabilitation.
Lake Gorrie

The Lake Gorrie property mainly consists of ‘stony rises’ landform with some collapsed lava tube features (used as defensive positions during the Eumeralla War). The north eastern portion of the site forms part of the Gorrie or Eumeralla Swamp. Visitors generally access the site from the east or south and it appears disconnected from other parts of the Budj Bim Landscape.

Until recently the site has been used as a grazing property. It has archaeological features representing both Aboriginal and more recent European settlement. The current focus of the site is on supporting Gunditjmara cultural activities and occasional day visitor use, along with occasional Budj Bim Tours. Facilities are minimal with a toilet and shelter facility to support Budj Bim Tours, mountain bike trail users and walkers.

Future directions include:
- Developing the location as a specialist interpretations point relating to wetlands, Gunditjmara settlement and Eumeralla War themes.
- Developing a specific road access system that connects Lake Gorrie to the wider Budj Bim network without using external public roads.
- Pursuing the long term acquisition of privately owned sites where the acquisition would allow environmental buffering and landscape rehabilitation.

Allambie

The property consists of a combination of ‘stony rises’ landforms and wetland areas linked to the edge of the original Condah Swamp. The site has until recently been used as a grazing property and still contains a stone quarry on a separate land title within the centre of the site which is accessed from the north.

It has archaeological features representing Gunditjmara settlement and cultural practices. The current focus of the site is on supporting cultural activities, Budj Bim Tours and occasional day visitor use. Facilities are minimal with a toilet and shelter facility to support tour use along with mountain bike trail users and walkers.

Future directions include:
- Developing the location as a specialist interpretations point relating to the Condah Swamp wetlands and related Gunditjmara settlement.
- Developing a specific road access system that connects Allambie to the wider Budj Bim network without using external public roads.
- Pursuing the long term acquisition of privately owned sites where the acquisition would allow environmental and visual buffering and landscape rehabilitation.
Lake Condah

The Lake Condah site includes the lake (reduced in size from the original), grazing land to the east and south-east that used to form part of the lake bed and adjoining stony rise landform. The northern section of the lake is still in private ownership and forms part of a grazing property.

Lake Condah is a defining element in the Budj Bim National Heritage Landscape. It is the best known place within the cultural landscape and, with lava formations, the weir, fish traps and settlement features, provides visitors with an overall picture of the landscape and the Gunditjmara story. In terms of existing land use:

- The site is now used as a cultural site by the Gunditjmara community and as a venue for Budj Bim Tours (lake and land based). The land area is undeveloped with the exception of vehicle tracks and some remaining farm fences.
- The site contains a new jetty and boat ramp facility which will be used as a starting point for lake based tours, general lake management and fishing activities.
- The Lake is expected to develop in the short to medium term as a fishery that will provide (subject to environmental conditions), commercial quantities of fish and eels and an opportunity for processing by a Gunditjmara aquaculture business located within the site.
- The water level of the lake varies seasonally and depending on rainfall and changes the shape of the water body and the extent of the lake littoral zone. This is likely to influence the location of lake edge paths and structures along with access pathways.
- The current extent of the lake (lower top water level) does not match the original extent of the lake which has changed the relationship between original settlements and the lake edge.

Future directions include:

- Developing the location as a specialist interpretations point relating to the Lake Condah ecosystem and Gunditjmara settlement. This site has the potential to function as a higher order multipurpose facility and service hub that tells a wider story of the Budj Bim Landscape and the cultural history of the Gunditjmara people (a possible single tourist stop destination).
- Pursuing the long term acquisition of privately owned sites where the acquisition would allow complete ownership of the lake and its surrounds, environmental and visual buffering, new road and trail access options and landscape rehabilitation.

Photo: Stewart Beaton 2010
View south-east over the Condah Swamp (in flood) to lake Condah

Muldoons

The Muldoons site is essentially an undeveloped stony rise landscape with high quality habitat. The site is subject to a range of ecological threats from fire, pest flora/fauna but is largely protected by the lack of access tracks and site facilities.

Future directions include:

- Muldoons retaining its function as a conservation reference area and cultural site with no tourist activity or access.
- Improving maintenance access from the Lake Condah Mission site.
- Pursuing the long term acquisition of privately owned sites where the acquisition would allow environmental buffering to adjoining private properties

Lake Condah Mission

The Lake Condah Mission site includes the location of the original settlement (bluestone ruins and a reconstructed timber building), the cemetery, an administrative/community building, short term accommodation structures and an area of grazing land to the south. There is a current building project to establish a new Administrative Centre and Keeping Place within the existing building precinct. The detailed design and siting of this structure and associated infrastructure is yet to be finalised (at this date). The site is now used as a multipurpose site by the Gunditjmara community and as a venue for major events.

Lake Condah Mission is a place with special meaning to the Gunditjmara community – as a community meeting place, an administrative centre, a symbol of political struggle and a link to family histories. As a result the Gunditjmara community do not want open public access to this site.

There is no clear physical or visual link (for visitors) between the Mission site and other significant places within the Budj Bim landscape. Budj Bim Tours bring visitors to the Mission ruins as part of a wider Budj Bim Landscape tour.

Future directions include:

- Seeing the Lake Condah Mission as primarily a Gunditjmara community place which may form a part of an interpretive ‘journey’ (escorted tour only) that takes in a number of key sites. The Lake Condah Mission site is particularly linked to stories related to post European settlement history and the political struggle for land and community recognition.
- Pursue the long term acquisition of privately owned sites where the acquisition would allow significant environmental and landscape rehabilitation, visual and environmental buffering to adjoining roads and farms.
Kurtonitj

The Kurtonitj property holds many cultural sites important to Gunditjmara people, including stone eel traps and stone channels, stone house sites and eel smoking trees. As more management tasks are undertaken at Kurtonitj, additional cultural sites are likely to be rediscovered and so the current pattern of archaeological sites (and interpretation) may change over time.

The site is now used as a cultural site by the Gunditjmara community and as a destination for Budj Bim Tours. The site has until recently has been used as a grazing property and it retains fences and other infrastructure related to that land use. Access to the site is from the south and north which leads to road and vehicle impacts on the reserve.

Future directions include:

- Seeing Kurtonitj as a key visitor destination which forms a part of an interpretive ‘journey’ that takes in a number of key sites – a sequential experience that will explain the nature of the landscape and the cultural story linked to that landscape. The Kurtonitj site is particularly linked to stories related to the Darlot Creek and to the hunting, food cultivation and environmental modification techniques used by the Gunditjmara people.
- Separating Gunditjmara community use from tourism based use where possible.
- Developing a landscape setting which has original environmental qualities, flood patterns and landscape character – qualities that will enable an ‘immersive’ visitor experience.
- In the long term, develop an alternative site entry that enters the centre of the site from west. Limit vehicle movement through the site.
- Pursue the long term acquisition of privately owned sites where the acquisition would allow for new access, significant environmental and landscape rehabilitation and visual buffering to adjoining roads and farms.
Tyrendarra / Peters

The property sits at the confluence of the Fitzroy River and Darlot Creek and features wetland, floodplain and Stony Rise landscapes. The site was a major settlement and contains many cultural sites important to Gunditjmara people, including stone eel traps, channels and house sites.

This is a major Budj Bim Tours destination. The site has facilities that are designed to cater for education and corporate groups (Giltrer Gunditj Visitor Place). The building is closed when not in use and does not function as a visitor centre. It has no external interpretation information or secondary functions. The site also has limited range of boardwalks, pathways and low level interpretive signage. Independent visitors can access the site without taking a tour.

The site is now used by the Gunditjmara community, as an environmental and cultural conservation area, as a destination for Budj Bim Tours and independent travellers. For many visitors, Tyrendarra will be the only location that they visit and therefore represent their only experience of the Budj Bim National Heritage Landscape.

The site is not accessible July to August because of flooding, which suggests that there should be alternative sites and interpretations experiences available for both organised and independent Budj Bim tourism. Recent bushfires have removed much of the tree cover and this has changed the visual character of the landscape.

Future directions include:

■ See Tyrendarra IPA as a key visitor destination which forms a part of an interpretive ‘journey’ that takes in a number of key sites. The Tyrendarra site is particularly linked to stories related to the Darlot Creek and to the hunting, food cultivation and environmental modification techniques used by the Gunditjmara people. This site can function as a single visitor destination – a place that tells the whole Budj Bim story as well as a place that tells a site specific story.

■ Develop a landscape setting which has original environmental qualities, flood patterns and landscape character – qualities that will enable an ‘immersive’ visitor experience.

■ Remove remnant farm features, rubbish dumps and exotic trees.

■ The site should provide some form of interpretations experience all year round, even if this is just a view of the site in flood.

■ Pursue the long term acquisition of privately owned sites where the acquisition would allow for new access, vehicle movement, significant environmental and landscape rehabilitation and visual buffering to adjoining roads and farms.
Tyrendarra IPA site entry

Darlot Creek

Tyrendarra IPA house re-creation

Tyrendarra IPA archeological site

Tyrendarra IPA existing toilet

Tyrendarra IPA wetland

Tyrendarra IPA Gilger Gunditj Visitor Place

Tyrendarra IPA Gilger Gunditj Visitor Place

Tyrendarra IPA interpretive signage
Convincing Ground

The Convinging Ground is an area of coastal land in Allestree. This site has been addressed through a separate Master Plan – Convinging Ground Initial Landscape Plan Draft, December 2012, Department of Planning and Community Development.

The site is of archaeological, historical and social significance to the State and significant to the Gunditjmara people as part of country and as an example of violent conflict where members of the Kilcarer Gunditj clan were killed by whalers.

Future directions include:
- A reformed environment with landform, planting and wetland elements that represent the historic landscape.
- Site stabilisation, erosion protection and stormwater management.
- New pathways and off site connections.
- Places that allow thematic story telling – original settlement / first settlement / whaling and sealing / conflict with indigenous people.

Figure 13. Proposed Master Plan - Convinging Ground

(Source: Initial Landscape Plan Draft December 2012, DPCD)
4.0 Tourism Analysis & Opportunities

This section provides an overview of tourism issues and opportunities. Additional information is provided in the report Budj Bim Master Plan – Tourism Opportunities and Business Case Report, Urban Enterprise September 2013.

4.1 Tourism Strategy & Policy Context

A number of strategic plans have been prepared by State, Local and Australian Governments which reference Indigenous Tourism and Great Ocean Road Region.

The Australian Government’s 2009 National Long Term Tourism Strategy states that in order for Australia to remain competitive in the Global tourism market; continued investment is required to deliver quality sustainable tourism product and services that provide visitors with compelling tourist experiences.

The Budj Bim National Heritage Landscape falls within the Great Ocean Road tourism region. The Great Ocean Road is one of 10 regions in Australia considered a nationally significant landscape. Australia’s National Landscapes program was developed to provide a long term strategic approach to tourism and conservation and to highlight Australia’s most outstanding natural and cultural environments. The program aims to achieve partnerships between tourism and conservation to:

- Promote Australia’s world class, high quality visitor experiences
- Enhance the value of tourism to regional economies
- Enhance the role of protected areas in those economies
- Build support for protecting our natural and cultural assets

The Budj Bim National Heritage Landscape has the potential to broaden the nature based and cultural experiences of the Great Ocean Road region through the provision of authentic Indigenous cultural and heritage experiences linked to outdoor activities. The 2009 Jackson Report, which informed the National Long Term Tourism Strategy, identified Indigenous culture as an important national ‘competitive advantage’ and a ‘key point of differentiation for Australia’.

At a state level, policy identifies the need to build upon Victoria’s unique indigenous heritage to strengthen local Indigenous community and business sectors. Accordingly, the Draft Victorian Aboriginal Tourism Development Plan (2013) identifies gaps in Indigenous tourism product, particularly in meeting domestic Victorian demand for experiencing Indigenous product within their own state and the potential for growth in international experiences. The plan identifies the Budj Bim Landscape as one of the key opportunities in the State to deliver an iconic aboriginal experience.

The Great Ocean Road Tourism Destination Management Plan identifies the development of Lake Condah / Budj Bim National Heritage Landscape as a priority project for the Region. Budj Bim has the potential to deliver a number of tourism experiences that are identified as key opportunities for the Great Ocean Road, including:

- Taste the Great South Ocean
- Attend a Great Australian Music Event
- Learn about Southern Australian Aboriginal Culture and Settlement.

4.2 Policy Direction

The Australian Government supports tourism through the Department of Resources, Energy and Tourism and Tourism Australia.

Great Ocean Road Region

The Great Ocean Road is one of 10 regions included in the Australia’s National Landscapes program. This program was developed to provide a long term strategic approach to tourism and conservation to highlight Australia’s most outstanding natural and cultural environments. The program aims to achieve partnerships between tourism and conservation to:

- Promote Australia’s world class, high quality visitor experiences;
- Enhance the value of tourism to regional economies;
- Enhance the role of protected areas in those economies; and
- Build support for protecting our natural and cultural assets.

The Great Ocean Region is promoted internationally by Tourism Australia through the National Landscapes initiative. Five experiences are targeted to international visitors through this initiative, including:

- Waves, bays and beaches;
- Rainforests, mountains and National Parks;
- Wildlife, big and small;
- Great Ocean Hugging journeys;
- Rich Indigenous History.

Recognizing the national significance of the region, the Commonwealth Government commissioned the Great Ocean Road Destination Management Plan to identify tourism product and experience gaps in the region. The Plan outlines potential tourism priority infrastructure projects to meet long term visitor demand and needs in the region.

At a state policy level, the Great Ocean Road Region is a key feature in Tourism Victoria’s strategic planning directions. The Nature Based Tourism Strategy highlights the importance of the Great Ocean Road in delivering authentic, memorable experiences to the visitor and identifies a number of tourism infrastructure and product initiatives to achieve this. Other strategies prepared by Tourism Victoria, such as the Regional Action Plan, highlight Tourism Victoria’s commitment to the Great Ocean Road with $2.1 million in joint funding for promotion of Victoria’s nature based tourism.
Indigenous Economic Development

At a state level, the Victorian Aboriginal Economic Strategy 2013-2020 identifies a number of key strategic initiatives to support employment and enterprise growth, and overall economic sustainability amongst Indigenous Victorians. These include, but are not limited to:

- Supporting young people to transition from education to training and employment, through partnerships with the Commonwealth and community based organisations;
- Leveraging off Native Land Titles to establish profitable businesses, generate employment opportunities within their community and build partnership with other enterprises and capital sources; and
- Targeting and supporting industries with growth opportunities for Indigenous employment and enterprise development.

In particular the Economic Strategy recognises the tourism sector as an identified growth industry for Indigenous economic growth, through leveraging off current attractions and developing new Indigenous tourism experiences.

Indigenous tourism

The 2009 Jackson Report, which informed the National Long Term Tourism Strategy, identified Indigenous culture as an important national ‘competitive advantage’ and ‘key point of differentiation for Australia in a highly competitive international tourism market’. The Report identifies a number of initiatives to ensure support and continued strength of Indigenous culture including, but not limited to:

- Increasing the engagement of Indigenous people in the tourism industry and labour force, particularly through industry partnerships;
- Increasing the quality and variety of Indigenous experiences and services available to the domestic and international tourism markets; and
- Integrating Indigenous tourism product into the tourism master planning process for nationally significant landscapes, as identified in Australia’s National Landscape program.

At a state level, policy recognizes the pre-eminence of the Northern Territory Indigenous tourism market and identifies the need to build upon Victoria’s unique Indigenous heritage to strengthen local Indigenous community and business sectors. Accordingly, Victoria’s Aboriginal Tourism Development Plan (2006-2009) was commissioned by Tourism Victoria to provide a clear path to business success for Indigenous cultural tourism attractions.

The Development Plan identifies significant gaps in Indigenous tourism product, particularly in meeting domestic Victorian demand for experiencing Indigenous product within their own state. Consequently, the Plan reiterates the need for continued product development to meet intrastate tourism demand, as well as interstate and international tourism markets. The following are strategies included in the plan designed to strengthen product development in Victoria:

- Providing resources to a Victorian Aboriginal tourism industry and market body;
- Encouraging mentoring and training of potential Aboriginal tourism industry and business leaders;
- Facilitating greater coordination of the management and provision of government assistance to Victoria’s Aboriginal businesses;
- Encouraging the development of a greater diversity of culturally appropriate Aboriginal tourism experiences; and
- Extending support for Aboriginal tourism product development programs.

Victoria’s Aboriginal Tourism Development Plan 2013-2023 was undertaken by Tourism Victoria. The execution of the Development Plan is identified as a Priority Action in the Victorian Aboriginal Economic Strategy 2013-2020, to grow the number and scale of Aboriginal businesses. The following is a summary of key development priorities from review of the policy document:

- The draft Development Plan identified Lake Condah as a key Strength of Indigenous Tourism in Victoria, recognizing Budj Bim’s status as the “world’s oldest village”.
- The Development Plan outlines the need for developing “regional experiences with particular consideration of the South West based around Lake Condah as part of mainstream promotion of the Great Ocean Road Tourism experience”.
- Furthermore, a key opportunity identified is the achievement of World Heritage listing for Budj Bim.

4.3 Indigenous Tourism In Australia

Indigenous tourism is a key segment of the Australian tourism market. Much of the existing Indigenous tourism product in Australia is located in the Northern Territory and in Queensland.

In 2009, spending by Indigenous tourism visitors was valued at $7.2 billion, representing 12% of total visitor expenditure in Australia. Indigenous tourism is a key attractor for inbound tourism markets, but it has declined in recent years. Furthermore, domestic overnight Indigenous tourism represents only a small segment of total domestic tourism.

Tourism Australia has identified Indigenous tourism as one of the seven key experiences which underpin Australia’s global marketing activities. Key indicators of Indigenous tourism in Australia identified by Tourism Research Australia (1) are as follows:

- The international Indigenous tourism market represented 13% of total international visitors, 20% of total international visitor nights and 19% of total international tourism expenditure.
- International Indigenous tourism visitors were less likely than other international visitors to spend nights in the capital cities and the Gold Coast (69% compared to 81%), and more likely to spend nights in regional areas than other visitors (31% compared to 19%).
- There were 306,000 domestic overnight Indigenous tourism trips, which generated 2.5 million visitor nights and $490 million in expenditure.
- Almost two and a half times as many domestic overnight Indigenous tourism nights were spent in a caravan or commercial camping ground compared to other domestic overnight visitors (29% compared to 12%).
- On average, international and domestic overnight Indigenous tourism visitors stayed longer and spent more per trip than other visitors.
- While international tourism to Australia increased by 5.1% in 2010, the number of international Indigenous tourism visitors declined 2.9% (compared to 2009).
- Amongst international visitors from Asian nations Indigenous tourism increased by 7% in 2010 compared with 2009.
- International visitors from Asian nations comprised 30% of the Indigenous tourism market in 2010. International tourism trends indicate that this proportion is likely to grow in the coming years.
Domestic market

Research undertaken by Tourism Research Australia found that the domestic market represented 71% of all Indigenous tourism visitors in Australia in 2009.(2) The research identified that most destinations in Australia receive significantly higher numbers of domestic visitors than international visitors.

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

Despite the strong presence and support from domestic visitors, Indigenous tourism research and promotion has been predominantly focused to the international market. As such, research has identified a lack of awareness and understanding towards ‘Aboriginal cultural experiences’ as key barriers within the domestic visitor market.

Research has also indicated that the Northern Territory is frequently regarded as the premier destination to experience Indigenous product and cultural immersion activities. The NT is home to a third of ‘market and export ready tourism products’ in Australia, signifying the state’s predominance in delivering and supporting Aboriginal cultural expenditure.(3) Despite the strength of the Territory’s position, studies have also found that the majority of Australian’s have a preference to experience Indigenous product within their own state.(4)

Tourism development leveraging off the interpretation of Budj Bim and Lake Condah’s rich Indigenous history may meet latent local demand for Indigenous experiences in Victoria.

Market & Export Ready Indigenous Tourism Product

Tourism Australia, in the document ‘National Indigenous Tourism Product Manual (2009), showcases a number of ‘export ready’ and ‘market ready’ Indigenous tourism products in Australia. The manual indicates the level of maturity, development and experience of Indigenous tourism businesses across Australia. These prerequisites include, but are not limited to, the following criteria:

- Community/family based model but has strong business focus, with a high level of community, family and individual motivation.
- Participating in the local/regional tourism industry and works cooperatively with the State Tourism Organisation (STO), Regional Tourism Organisation (RTO) and Local Tourism Association (LTA).
- Strong understanding of customer service environment and the needs of the domestic and international markets.
- Must be fit for sale in a manner and at cost suitable to wholesalers.
- Have administrative procedures in place (for bookings and bookkeeping) and consistently delivers on the programs it commits to in relation to stated opening hours or program delivery.
- Strong understanding of customer service environment with data collection mechanism in place to know visitor numbers per year and major market information.
- Understands the distribution system and pricing and commission structures i.e. commissionable to suit the international market.
- Website maintained with current information available on products, times, prices, booking systems and 24 responsive systems.

4.4 Indigenous Tourism Case Studies

This section examines Indigenous tourism case studies located in Australia, providing insight into success factors for the development of Indigenous tourism product. The case study review assessed a range of Indigenous tourism sites, including:

- Coorong Wilderness Lodge, SA
- Brambuk Cultural Centre, Halls Gap, VIC
- Mungo National Park, Willandra Lakes region, NSW
- Uluru-Kata Tjuta Cultural Centre, Uluru, NT
- Jumbulla Aboriginal Discovery Centre, Wollongong, NSW
- Gunditj Visitor Centre, Tower Hill, VIC
- Brewarrina Aboriginal Fish Traps (Ngunnhu), Brewarrina, NSW

The case studies suggest a range of principles that should be applied to the development of Indigenous tourism products and services:

Recognising Target Markets

It is important that there is a clear understanding of potential target markets. The following markets were identified as important for the Coorong Wilderness Lodge:

- Backpackers on bus tours between Adelaide and Melbourne.
- Coach tours.
- Inbound and specialist tour operators, providing access to upmarket, high yield visitors interested in Aboriginal experiences.
- Drive-by market on the Great Ocean Road travel route.
- Specialist groups such as university, environmental and reconciliation groups. Budj Bim has the potential to draw on similar visitor markets to those identified above.

Understanding Target Market Preferences

Domestic travellers are more likely to undertake an Indigenous experience where it is part of a multi-layered visitor experience. Therefore it makes sense to collocate an Indigenous experience with a range of supporting elements such as dining, arts and crafts, and retail.

Domestic tourists are generally seeking fun and relaxation on a domestic holiday, and therefore they are most willing to engage in Indigenous experiences which are seen as safe, easily accessible and engaging.

In the domestic market it has been shown that tourists enjoy Indigenous experiences which are hands on, interactive, personal and offer a variety of learning elements. Passive experiences where people are primarily watching others undertake an activity are also appealing.

1. Snapshots 2011, Indigenous Tourism Visitors in Australia, Tourism Research Australia
2. Selling Indigenous Tourism Experiences to the Domestic Market, Tourism Research Australia, 2010
3. Victoria’s Aboriginal Tourism Development Plan 2006-2009, Tourism Victoria
4. Bid.
Indigenous experiences which incorporate natural elements such as water, earth and fire hold broad appeal. In the case of Budj Bim, the connection of the Indigenous experience to Lake Condah and Darlot Creek should be a key feature of any potential development. Case studies indicate a preference for guided tours, hosted by local Indigenous persons with extensive local knowledge and personal ties to the land. Aboriginal sites also should be supported by self-guided tours and interpretive facilities, to meet time-constrained visitor markets. Engagement of local Indigenous communities is a critical element for success, particularly the delivery of an authentic experience for visitors. Cultural centres provide opportunities for local Indigenous employment and the provision of training pathways.

Securing Stable Revenue Streams
Creating viable additional revenue streams is vital to the success of an Indigenous tourism product. Viewing interpretive elements should either be very low cost or free with the focus on generating revenue from add on elements such as a gift shop, art and craft sales, bush tucker and tours.

Nature - Based Location & Design
The case studies also highlight the importance of exhibiting the unique wildlife, natural settings and scenic views of the location. The Brambuk, Worn Gundidj and Uluru-Kata Tjuta cultural centres provide examples of how Indigenous elements and natural materials can be incorporated to create a building of architectural significance. The Brewarrina Fish Trap product indicates that fish traps tours are able to meet ‘market ready’ standards and attract visitor markets, particularly for history interest groups and schools.

Strategic Business Planning
Indigenous tourism is a complex industry that requires a high level of dedicated planning, consultation and understanding in order to create successful experiences and business models. Mentoring served an important role in supporting these businesses through providing independent advice for training, administration, management, business planning and securing grant application. The case studies also highlight the importance of strengthening business networks with tour operators, regional tourism organizations, visitor centres and other complimentary tourism businesses. These business networks supported stable levels of visitation through marketing and joint-venture agreements.

Managing Organisational Objectives
A large number of Indigenous tourism establishments are positioned within the organisational framework of non-profit organizations and Indigenous community groups. As such, Indigenous tourism businesses face additional objectives above commercial viability and profitability, including the wider aims of environmental protection, preserving culture and traditions, and ensuring community self-determination through education, training and employment. These objectives are not necessarily in conflict with each other; however, prioritising and managing goals will be crucial in ensuring business viability as well as meeting social, cultural and environmental outcomes.

Competitor Analysis
The analysis has identified two major Indigenous products in Western Victoria; The Brambuk Cultural Centre and Tower Hill/Worn Gundidj Visitor Centre. The following is a summary of the features of the two Indigenous tourism centres:

- Both centres place importance on natural-based themes, drawing on local creation stories and national/state parks to enhance tourism experience.
- Surrounding landscapes and wildlife have been incorporated into the design of both Centres, enhancing the architectural significance and natural harmony of both facilities.
- Visitor experience is a key focus and strength for both facilities. Whilst Worn Gunditj Visitor Centre focuses on the nature-based experience (tours of wildlife, bush tucker and the Tower Hill volcanic landscape), Brambuk Cultural Centre places its strength in delivering cultural experiences (painting, boomerang throwing and didgeridoo workshops).
- The cultural experience of Brambuk Cultural Centre is, importantly, complimented by modern interpretive displays, including the Award winning Gariwerd Dreaming Theatre.
- Brambuk Cultural Centre presents a wide range of Aboriginal cultural history and information, rather than information which is specific to the Grampians region.
- Although both tourism products feature historical themes, the availability and accessibility of featured sites and artefacts is limited and this has hindered the delivery of authentic Indigenous heritage experiences.
The analysis has identified two major Indigenous centres:

4.4. COMPETITOR ANALYSIS

- Surrounding landscapes and wildlife have been incorporated into the design of both Centres, enhancing the architectural significance and natural harmony of both facilities.
- Both centres place importance on natural-based landscape, Brambuk Cultural Centre places its focus on the nature-based experience (tours of wildlife, bush tucker and the Tower Hill volcanic landscape). The Centre provides cultural displays and Aboriginal craft. The Landscape features artefacts of Aboriginal people found in layers of volcanic ash. However, there is limited display of the heritage and historical significance of the site and artefacts.
- The Centre significantly relies upon the nature-based aspects of the Grampians National Park, including its strategic location in view of the ranges. Interpretive displays also lies in the nature-based themes of the landscape. However, wildlife viewing is limited to kangaroos grazing in the Centre’s grounds.

Table 2 – Indigenous Tourism Products – Summary Of Key Attributes

<table>
<thead>
<tr>
<th>Attributes</th>
<th>Worn Gunditj Visitor Centre/Tower Hill State Game Reserve</th>
<th>Brambuk Cultural Centre/Grampians National Park</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Visitation</td>
<td>Unknown.</td>
<td>200,000</td>
</tr>
<tr>
<td>Design and facilities</td>
<td>The visitor centre, designed by architect Robin Boyd, inspired by the volcanic mountain top of the Tower Hill landscape. The centre features cultural displays and Aboriginal craft.</td>
<td>The Cultural Centre features unique building design that is influenced by sweeping wings of the Brambuk (Cockatoo). The centre features modern interpretive displays (including the Gariwerd Dreaming Theatre), function centre for conferences, Bush foods café and a Backpacker hostel.</td>
</tr>
<tr>
<td>Key tour experiences</td>
<td>Self guided tours of the game reserve, including a road that circuits the landscape. Guided Indigenous tour programs including wildlife viewing cultural activities (painting, dancing and music, boomerang, spear and traditional games). Barbeque with native foods and spices.</td>
<td>Didgeridoo workshops. Boomerang painting and throwing. Bush food Discovery Walk and Bush Food Café. Tour of local Dreamtime creation story and Aboriginal rock art sites.</td>
</tr>
<tr>
<td>Cultural themes</td>
<td>The Centre provides cultural displays and Aboriginal arts and crafts, including merchandise for sale. Worn Gunditj also hosts a number of cultural activities as listed in the tour experience.</td>
<td>The Brambuk Cultural Centre’s strength is in cultural themes, including the delivery of award winning interpretive experiences (theatre viewing, painting, boomerang throwing, didgeridoo workshops, etc.). As such, well developed cultural itineraries have supported visitation, particularly from school groups and backpackers.</td>
</tr>
<tr>
<td>Historical/heritage site and artefacts</td>
<td>The landscape features artefacts of Aboriginal people found in layers of volcanic ash. However, there is limited display of the heritage and historical significance of the site and artefacts.</td>
<td>The centre promotes the unique Aboriginal rock art sites along the Grampians. However, due to the location of these sites in the mountainous ranges, the historical and heritage aspect remains relatively detached from the Cultural Centre.</td>
</tr>
<tr>
<td>Nature-based themes</td>
<td>The centre is significantly tied to the volcanic landscape and the Tower Hill State Game Reserve. A key strength of the tourism product is the promotion wildlife viewing experiences. Furthermore, the telling of the landscapes creation story, whilst undertaking a wilderness tour, significantly enhances the nature-based tourism experience of Tower Hill.</td>
<td>The Centre significantly relies upon the nature-based aspects of the Grampians National Park, including its strategic location in view of the ranges. Interpretive displays also lies in the nature-based themes of the landscape. However, wildlife viewing is limited to kangaroos grazing in the Centre’s grounds.</td>
</tr>
</tbody>
</table>
4.5 Visitation Trends

Overall Victorian tourism market

Trends in the Victorian tourism visitor market include:

- Victoria’s tourism industry is primarily driven by domestic spending of Australian residents. In 2012, domestic visitors from Victoria consisted of 63% of overnight visitors to the state, with the remaining 28% attributed to interstate visitors and 9% to international visitors.

- Over the past decade, the domestic visitor market has experienced declines in visitation, by over 10% between 2002 and 2012, as depicted in Figure 4. Decline in domestic visitation and spending has been largely attributed to a shift to overseas travel by Australian residents, driven by changes in exchange rate, household income and cost of air travel. However, in recent years, the industry has seen recovery in visitation level, driven by resurgence in intrastate tourism from Victorians.

- The Victorian tourism industry has also seen significant increases in international visitor market, growing by 50% between 2002 and 2012. Growth in international visitation outperformed the national average (29% over the same period) and key competitors of New South Wales (15%) and Queensland (9%).

- Growth in international visitors has been driven by emerging markets in Asia. In 2011, China overtook New Zealand to become the number one international market for Victoria in terms of visitors and expenditure.

- The Indigenous Tourism visitor market achieved peak visitation of 436,000 visitors in 2006. The market has since seen significant declines to 334,000 visitors in 2012. Despite this, the share of Indigenous Tourism visitors has remained relatively constant over the past decade.

Great Ocean Road Visitor Markets

Visitation to the Great Ocean Road Region peaked in 2000, coinciding with the Sydney Olympics. Since the year 2000 the region has maintained visitation between 7 and 8 million per year. The Great Ocean Road region has maintained a consistent market share of 3 to 4% of Australian visitation over the past 10 years, including domestic and international visitors.

The Great Ocean Road Destination Management Plan 2012 identified 4 primary psychographic market segments for the region. Of the 6.8M domestic visitors to the Great Ocean Road region the domestic markets are:

- Visible Achievement (27%)
- Socially Aware (24%)
- Traditional Family Life (20%)
- Young Optimism (6%)

These segments contribute around 77% of domestic visitors to the region. The Visible Achievement and Socially Aware are more likely to seek out unique experiences and spend more when visiting, making them particularly important segments.

Figure 22. Visitation To Australia And The Great Ocean Road Region

Broader Discovery Coast Region Visitor Markets

The Broader Discovery Coast Region, as defined, is estimated to attract over 566,000 visitors annually, consisting of 306,000 overnight visitors and 260,000 daytrip visitors.

Natural attractions and outdoor activities attract young families and adult couples to the region. The Shire’s location in close proximity to the State border also enables the region to draw day trip visitors from South Australia. The following section provides a profile of the existing domestic and international visitor markets. Visitor profile has been sourced to Glenelg Shire Tourism Research (Urban Enterprise, 2010).

Daytrip Visitors

- Regional Victoria residents remain as the primary market for daytrip visitors to the Glenelg Shire. Interstate visitors, predominantly from South Australia, also comprised a significant proportion of daytrip visitors to the Glenelg Shire. Visitors from the USA, Germany and New Zealand were also an important segment of the market.

- 78% of daytrip visitors state that their main purpose of visit was for “holiday / leisure”, with over 44% of visitors “travelling through the region”. Another 36% indicated that they were undertaking “touring” activities through the region.

- The most common age group of day trip visitors was aged 18 and below, indicating a strong presence of young families visiting the Shire.

- The most common travel party was adult couples (38%) and family groups (33%), with an average travel group size of 3.7 persons.

- The most popular activity undertaken by daytrip visitors was “sightseeing” (43%), followed by going to the “beach” (31%) and “eating out” at restaurant/cafes (22%).

- 38% of day trip visitors associated Glenelg Shire with the “coast” and “Portland harbour”.

- During the visit to the region, a notable 40% of day trip visitors visited Cape Bridgewater. This is followed by Nelson (35%) and Heywood (10%).

Figure 21. Victorian Visitation Trends, 2002 – 2012
Overnight Visitors

- Visitors from Victoria comprised the most significant proportion of overnight visitors (57%), while interstate visitors (35% of overnight visitors) were predominantly from South Australia. Germany and the UK provided the greatest proportion of international overnight visitors.
- The majority of visitors were attracted to Glenelg Shire as a holiday/leisure destination. 39% of overnight visitors were motivated by word of mouth recommendations by family/friends/travel agents to visit the Shire.
- The most common age group of day trip visitors were aged 18 and below, indicating a strong presence of young families visiting the Shire.
- The most common travel party was family groups (41%) and adult couples (37%), with an average travel group size of 4.2 persons.
- Accommodation in Caravan Parks remained the most popular type of accommodation used (at 32%); this was followed closely by standard hotels/motels and friends/relatives houses (each at 15%).
- Over 60% of overnight visitors had stayed in the Shire between one and three days, while the average length of stay was 3.5 nights.
- Over two-thirds of respondents indicated Portland as their primary destination of travel (while visiting nearby Cape Bridgewater and Nelson). Within the Shire, over 60% of overnight visitors went “sightseeing”. This was followed by “going to the beach” and “eating out” at local restaurants and cafes.
- Nearly 60% of overnight visitors had indicated a visit to Cape Bridgewater, indicating the popularity of the township location. This is followed by Nelson (31% of overnight visitors) and Heywood 14%.

Visitation To The Budj Bim National Heritage Landscape

The following table outlines the existing visitor markets and visitation to the Budj Bim National Heritage Landscape. The business visitors market represented the largest proportion of visitors to Budj Bim, providing 39% of the 648 visitors in 2009. These groups include government agencies, regulatory bodies and larger private companies in the region, seeking cultural awareness programs and tours for professional development purposes.

The education market consists of 27% of visitation in 2009. The visitor market typically consists of school groups within the South West region of Victoria and university students undertaking field trips from universities in Melbourne and Warrnambool.

Interests groups represented over 25% of visitors to Budj Bim in 2009. This visitor market consists of history groups, conservation volunteers, bird watching clubs, photography groups, and mountain bike clubs. Despite the prominence of the market within the Broader Discovery Coast Region, holiday and leisure visitors consisted of the smallest proportion of visitation to Budj Bim, with 9% of visitors in 2009. This may be due to the high level of competition with other tourism products along the Great Ocean Road.

The holiday and leisure market typically consists of international visitors (aged 25-65) and older domestic visitors (55-65), represented within the Socially Aware, Young Optimists and Traditional Family Life visitor segments.

### Table 3 – Visitation To Budj Bim Tours - 2009

<table>
<thead>
<tr>
<th>Visitor Types</th>
<th>Visitors</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Visitors</td>
<td>250</td>
<td>39%</td>
</tr>
<tr>
<td>School Groups</td>
<td>178</td>
<td>27%</td>
</tr>
<tr>
<td>Interest Groups</td>
<td>164</td>
<td>25%</td>
</tr>
<tr>
<td>Holiday and Leisure Visitors</td>
<td>56</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>648</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Current information suggests that:
- Approximately 115 people were taken on tours in 2012 (excluding school groups). This is a decline from 470 people (excluding school groups) in 2009.
- Tours are generally 2-3 hours in length and cost an average of $55 including GST per person (excluding any catering).
- Visitors are mostly couples travelling independently, a few special interest groups, eg. Field naturalists and bird watching groups, corporate groups on cultural awareness programs, as well as a few school groups.

Other Tourism Activity On The Budj Bim Landscape

Camping at Mount Eccles National Park is the only other tourism activity within the Budj Bim Landscape for which visitation data is collected. The number of visitors to the park as a whole is not monitored; however, Parks Victoria estimates that around 30,000 people per year visit the park, mostly on daytrips. People visit to bushwalk, view the wildlife (especially koalas and kangaroos), picnic, visit the caves and Lake Surprise and explore the volcanic geology. There are no ranger programs for visitors (eg. guided tours) or commercial services in the park.

The park has a camp ground and visitors are required to book camp sites at the park. Parks Victoria data on camper numbers suggests that camping for March 2012February 2013 includes:
- A total of 1, 393 campers staying 2261 camper days.
- Average length of stay was 1.62 nights.
- The most common travel party sizes were:
  - Couples – 38%
  - Family / friends groups (3-10 campers) – 43%
  - Special interest / recreational groups (mostly 30 people) – 17%
- The months of May to September are very quiet with much stronger visitation during January, March and April. Overall, there is a fairly low level of activity on the Budj Bim Landscape, with the exception of daytrip visitation to Mount Eccles National Park.
- Additional commercial tourism activities on the landscape is likely to increase marketing and awareness of the area, its features and the opportunities to take tours.
4.6 Regional Tourism Context

Budj Bim National Heritage Landscape is strategically located in proximity to major tourism nodes within the Great Ocean Road Tourism Region and south of the Grampians Tourism Region, allowing Budj Bim to draw on existing visitation to western Victoria.

Budj Bim National Heritage Landscape is located amongst major tourism nodes within the Great Ocean Road Region and the Great South Coast Region. This provides the opportunity to draw visitation to Budj Bim from existing visitation in the region. There is significant opportunity to leverage off the Great Ocean Road Region, which attracts more than half of the international overnight visitors to Victoria and more domestic tourist expenditure than any other region in the state.

The Budj Bim National Heritage Landscape is also situated close to the Grampians National Park, a major nature-based tourism drawcard to South West Victoria. The Grampians are one of Victoria’s premier Indigenous tourism destinations, particularly through the award winning Brambuk Aboriginal Cultural Centre. The Grampians, together with the Black Ranges, is also home to the largest concentration of rock art sites in Victoria. Tourism development and infrastructure to support these rock art sites are largely underdeveloped, with significant opportunities for tourism and business growth towards the future. Promotion together with the Budj Bim Indigenous Heritage Landscape may support the development of an Indigenous tourism cluster within South West Victoria.

Visitation to these tourism destinations is primarily driven by the self-drive tourist market, which are supported by well-established tourist routes, road infrastructure, tourist signage and marketing / promotion. The Budj Bim National Heritage Landscape is strategically located to attract visitors from the tourism routes that service these tourism destinations. The following figure provides an overview of surrounding touring routes, including the Great Ocean Road, Great Southern Touring Route, Limestone Coast and Coonawarra Wine Region in South Australia, and the direct Adelaide-Melbourne Route along the Western Highway.

4.7 Potential Visitor Markets

Analysis of existing tourism data suggests the following patterns of visitation:

- The Great Ocean Road region attracts over 8 million visitors per annum.
- The Broader Discovery Coast Region which includes Glenelg Shire and the western part of Moyne Shire captures around 7% of total visitation to the Great Ocean Road, attracting 566,000 visitors including 306,000 overnight and 260,000 daytrip visitors.
- Visitors from Victoria comprised the most significant proportion of overnight visitors (57%), while interstate visitors (35% of overnight visitors) were predominantly from South Australia.
- International markets constitute 26,000 visitors to the Broader Discovery Coast Region, typically comprising of European markets (UK, Germany), USA and New Zealand.

The Budj Bim Sustainable Tourism Plan (2007) undertook primary research into Victorian visitor markets, this research identified that 8% of visitors to Victoria would visit Budj Bim if it were developed further into a defined Indigenous product.

Analysis of existing Indigenous destinations and a review of segmentation undertaken by Tourism Australia highlights a number of potential target markets for Budj Bim. These markets are:

- **Socially Aware domestic visitors.** This psychographic segment identified by Roy Morgan Research constitutes a proportion of the population which are higher yield visitors, who are seeking cultural, nature based, educational and heritage experiences. The segment aligns well with the potential product offer and experiences offered at Budj Bim. The Great Ocean Road Region annually attracts around 1.6 million visitors who are “Socially Aware”.

- **International experience seekers.** This group of international visitors, identified by Tourism Australia, constitutes a segment of international visitors (from various counties) who are high yielding and have preferences for authentic cultural and nature based tourism experiences. The Great Ocean Road region currently attracts around 260,000 international experience seekers annually.
Niche Visitor Segments

- **Domestic retired self-drive visitors.** The region having a number of touring routes that traverse through it provides opportunity to attract retired self-drive visitor markets.
- **These include Grey Nomads and also now a new generation of touring baby boomers.** It is estimated that around 93,000 retired self-drive visitors traverse through the Broader Discovery Coast Region annually.
- **Corporate/business visitors.** This group already constitutes the largest visitor group to Budj Bim. There are two aspects to this group: firstly there are groups which visit Budj Bim for Cultural awareness programs and secondly there is opportunity to expand into business events with a unique Indigenous aspect.
- **Education market.** The education market has been identified as an opportunity for Budj Bim. Budj Bim currently attracts education visitors; however there is potential to include Budj Bim within Primary, Secondary and Tertiary curriculums. For primary and secondary groups, Budj Bim can draw on a regional catchment of schools, while for tertiary groups the catchment would be Australia wide and international. Budj Bim is suited to a range of syllabus for primary and secondary sector, including Australian history, indigenous culture, geology and geography.
- **Coach and Tour Visitors.** Budj Bim is in close proximity to the Great Ocean Road, Great Southern Touring Route and Limestone Coast Touring Route. There is opportunity to work with wholesalers and coach tour operators to incorporate a Budj Bim stopover. It is estimated that there are around 90,000 coach visitors to the region per year. Research into this sector was also undertaken as part of the sustainable tourism plan in 2007. Tour visitors may also include the (Portland based) cruise ship market which is expected to commence in March 2014.
- **Special Interest Groups.** Special interest groups are wide and varied; they may include bird watchers, sports groups, Lions clubs etc. The preferences of these target markets are provided in the following table. This identifies the experiences and products that should be considered for Budj Bim Heritage Landscape. The development of a marketing plan will be an essential element in order to target the segments identified.

The preferences of these target markets are provided in the following table. These experiences and products form the basis of the Master Plan recommendations. The development of a marketing plan will be an essential element in the development of these markets.

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**Table 4 – Overview Of Tourism Product Visitor Preferences**

<table>
<thead>
<tr>
<th>Markets</th>
<th>Sub-markets</th>
<th>Market Size</th>
<th>Length of Stay</th>
<th>Accommodation Preferences</th>
<th>Activity Preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Domestic Socially Aware Visitor</strong></td>
<td></td>
<td>1.6 million visitors &lt;br&gt; (Great Ocean Road region)</td>
<td>Daytrip (1-3 hours)</td>
<td>Self contained cabin/eco-lodge &lt;br&gt; (4 Star and above)</td>
<td>Fishing, wildlife viewing, bushwalking, art, music and cultural experience &lt;br&gt; (bush Tucker, storytelling, eel fishing)</td>
</tr>
<tr>
<td><strong>International Experience Seeker</strong></td>
<td></td>
<td>260,000 visitors &lt;br&gt; (Great Ocean Road region)</td>
<td>Daytrip (1-3 hours)</td>
<td>Self contained cabin/eco-lodge &lt;br&gt; (4 Star and above)</td>
<td>Bush Tucker, storytelling, multi-day walking, wildlife viewing &lt;br&gt; guided tours, adventure activities (kayaking/canoeing) &lt;br&gt; festival and events, art, musical and cultural experiences.</td>
</tr>
<tr>
<td><strong>Niche Markets</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Budj Bim Heritage Tourist Market</strong></td>
<td><strong>Primary School</strong></td>
<td>2,130 visitors &lt;br&gt; (1.5 hour catchment area)</td>
<td>Daytrip (5-6 hours)</td>
<td>-</td>
<td>Guided tours, storytelling, educational programs, Indigenous cultural experience (bush Tucker, eel fishing)</td>
</tr>
<tr>
<td></td>
<td><strong>Secondary School</strong></td>
<td>2,135 visitors &lt;br&gt; (1.5 hour catchment area)</td>
<td>Overnight (2-3 nights)</td>
<td>Dormitory style accommodation &lt;br&gt; Camping</td>
<td>Guided tours, storytelling, educational programs, adventure activities, Indigenous cultural experience (bush Tucker, eel fishing)</td>
</tr>
<tr>
<td></td>
<td><strong>Tertiary, Postgraduate and Researchers</strong></td>
<td>720 students and above &lt;br&gt; (Victoria)</td>
<td>Overnight (5 nights above)</td>
<td>Dormitory style accommodation &lt;br&gt; Self-contained accommodation</td>
<td>Guided tours (own programs)</td>
</tr>
<tr>
<td><strong>Coach and Tour Visitors</strong></td>
<td><strong>Short Tour Market</strong></td>
<td>89,873 visitors &lt;br&gt; (Victoria)</td>
<td>Daytrip (1-2 hours)</td>
<td>-</td>
<td>Short self-guided tours with interpretation, wildlife viewing and bush Tucker experience.</td>
</tr>
<tr>
<td></td>
<td><strong>Long Tour Market</strong></td>
<td></td>
<td>Overnight (1-2 nights)</td>
<td>Dormitory style accommodation &lt;br&gt; Self-contained cabin/eco-lodge &lt;br&gt; (4 Star and above)</td>
<td>Authentic Indigenous experience (bush Tucker, storytelling, eel fishing), multi-day walking, wildlife viewing, guided tours, adventure activities (kayaking/canoeing) &lt;br&gt; festival and events, art, musical and cultural experiences.</td>
</tr>
<tr>
<td></td>
<td><strong>Corporate/Business Visitors</strong></td>
<td>77,000 visitors &lt;br&gt; (Victoria)</td>
<td>Overnight (1-2 nights)</td>
<td>Self contained cabin/eco-lodge &lt;br&gt; (4 Star and above)</td>
<td>Fishing, wildlife viewing, bushwalking, art, music and cultural experience &lt;br&gt; festivals and events, authentic Indigenous experience &lt;br&gt; (bush Tucker, storytelling, eel fishing)</td>
</tr>
<tr>
<td></td>
<td><strong>Other Special Interest Groups</strong></td>
<td>Visitor numbers unidentifiable</td>
<td>Overnight (1-2 nights)</td>
<td>Dormitory style accommodation</td>
<td>Bushwalking, sightseeing, wildlife viewing, adventure activities (kayaking/canoeing, mountain-biking).</td>
</tr>
</tbody>
</table>
Overview Of Indigenous Tourism Visitor Preferences

Tourism Australia in the document ‘Selling Indigenous Tourism to the Domestic Market’ (2010) has identified a list of what domestic tourists are looking for in Indigenous experiences:

- Australian tourists are primarily looking for fun and relaxation in their holiday choices, operators should keep in mind that Indigenous experiences are generally perceived to be more intensive, often providing reward after substantial time and effort.
- Experiences which portray an Indigenous cultural element as an addition to an already appealing experience will be more attractive to domestic tourists.
- People like to learn and ‘get their hands dirty’ so operators should highlight both informative and hands on elements of their experience.
- Many tourists feel that Indigenous activities are remote, can be uncomfortable and sometimes dangerous. Images and text should communicate wherever possible, the safety, comfort, consistency and professionalism of their product and that it is in an easily accessible location.
- Fun (fishing/hunting, bush Tucker, stories), variety of activities and learning increases appeal, as does portraying the experience with Australia’s beautiful scenery in the background.
- Experiences that are unique and incorporate natural elements such as water, earth, fire and rainforest hold broad appeal.

In addition to these items, Tourism Australia also identifies areas to avoid when providing Indigenous experiences:

- Domestic tourists generally want to touch, feel and taste their experiences, as such it is important not to portray (through images or text) passive activities where people are primarily watching.
- Domestic tourists want to see people interacting and being engaged in the activity, they want to be ‘shown how’ and then be allowed to do it themselves.
- Most domestic tourists have thrown a boomerang or watched a corroboree. It is important when marketing to domestic tourists to focus on activities that are new and unique.

Tourism Australia also identifies that differences in market segments should be considered when proving and marketing for an Indigenous experience:

- Young adults respond best to opportunities for group interaction and involvement, satisfying this segments needs for fun and bonding - show groups having fun and interacting.
- Adults without kids favour experiences that are more intimate and allow direct engagement in a dynamic setting – show smaller groups, timeout for couples, and spirit of adventure.
- Families with younger children seek outdoor, interactive experiences with a variety of activities, whilst those with older children prefer an additional learning element – show a safe environment for fun and learning.
- Older adults that are still working but with no kids at home are motivated by opportunities to connect with Indigenous people in a natural environment - show active participation in activities, where they can feel they are still young enough to be hands on.
- Retirees require a safe and comfortable environment, as well as opportunities for meeting other travellers – show social interaction in a comfortable and learning environment.

Visitor Target Markets

Socially Aware Domestic Visitors

Socially Aware visitor market has been identified as the most appropriate psychographic segment for domestic visitation to the Budj Bim National Heritage Landscape. The following outlines the profile and preferences of the Socially Aware visitor market:

Market Profile

- The Socially Aware represents 24% of domestic visitors to the Great Ocean Road region, an estimated 1,629,360 visitors in 2010. The Great Ocean Road Destination Management Plan (2012) projects the market to grow to 2,034,000 domestic visitors by 2030.
- People in the Socially Aware segment are generally well-educated, socially active, and community minded. They are astute, technologically up to date, like to be trend setters, and are better communicators than the general population.
- The Socially Aware segment is predominantly comprised of people of higher socio-economic status, mostly aged between 28 and 40 years.
- The Socially Aware are regular holiday makers, with 81.3% taking some kind of annual trip, the highest percentage of any of other psychographic segments. Not only are they regular travellers, they present a high yield, with an average spend per person of $2,191 per trip.
International Experience Seekers

International Experience seekers have been identified as the most appropriate international visitor segment for visitation to the Budj Bim National Heritage Landscape.

Market Profile

- Tourism Australia has identified experience seekers as the target market for the Great Ocean Road region.
- There were 2.7 million experience seekers who visited Australia in 2010; of these, 10% or 260,000 visited the Great Ocean Road region.
- The Great Ocean Road region received the highest number of experience seekers from Other Europe in 2010 (58,414 visitors), followed by the United Kingdom (43,097) and Germany (25,593).
- Projections indicate that the visitor market will be a key source of visitation growth to the Great Ocean Road. By 2020 Continental Europe and UK experience seekers will maintain its position as key experience seeker visitor markets; however, over the same period growth in the China visitors will displace Germany as the third largest experience seeker market to the Great Ocean Road.
- The Great Ocean Road region captured the largest proportion of experience seekers from the German market to Australia in 2010 (23% of total German experience seekers to Australia); followed by Other Europe (18%) and the Chinese market (17%). The data suggests that marketing to these markets is expected to yield the largest visitors. Conversely, Great Ocean Road Region captures a very small proportion of experience seekers from New Zealand (3%), Japan (4%), Indonesia (3%) and Singapore (6%).
- Over half of the experience seekers to the Great Ocean Road region were adults aged between 20 years and 34 years in 2010. A Further 28% were aged between 35 years and 54 years. When compared with Australia, the Great Ocean Road region tended to attract a higher proportion of experience seekers aged between 20 years and 34 years.
- Experience seekers have an average length of stay of 7.6 nights in the Great Ocean Road region. In particular, experience seekers from the United Kingdom, stay longer than other key international segments (8.5 nights).
- Experience seekers have an average experience of $155.56 per person per night. German experience seeker segments spend significantly more in the Great Ocean Road region than other visitors ($529 per person per night). Visitors from China spend the lowest of key international experience seeker markets ($207).

Primary Preferred Preferences

- Food and wine experience. Overwhelmingly, this is the number one preference for experience seekers and is identified as a preferred activity by all key origin markets.
- Nature based experience. This is the second most common preference for experience seekers from all origin markets and is a key preference for all markets identified except Japan.
- Shopping experience. All key experience seeker markets except the United States and New Zealand expressed a preference for a shopping related experience during their visit.

Secondary Preferred Preferences

- Festivals and events. German, British and American experience seekers had a preference for attending festivals and events.
- Walking experience. German and American experience seekers had a preference for a walking experience, however this was not matched by other markets.

Accommodation Preferences

- The accommodation preferences for international experience seekers varies significantly by market and highlights the need to provide a variety of accommodation options to meet the experience seeker market demand. Preferences include budget hotels, 4/5 star hotels, guest houses/B&Bs and self-contained accommodation and Tourist Parks.

Niche Visitor Target Markets

A literature review has indicated that an understanding of niche visitor segments provides opportunities for smaller and targeted yet reliable flows of visitation throughout the year, supporting stable income streams for Budj Bim region.

Given its unique location within the Great Ocean Road region and along major tourist routes, the review has identified opportunities to draw on the following niche visitor target markets:

- Corporate/business visitors
- Education market
- Coaches and tour visitors
- Retired self-drive domestic visitors
- Special interest groups.

Corporate/Business Visitors

At present, the corporate and business visitors form the largest visitor market to the Budj Bim National Heritage Landscape, attracting 250 visitors in 2009. Due to the unavailability of data, the market size is currently unidentifiable. However, previous studies have indicated that corporate groups commonly represent government agencies, natural resource management bodies and private companies in the region, seeking cultural awareness programs and tours for professional development purposes.

Previous research indicates that the corporate demand for cultural awareness programs is concentrated towards larger sized employing organizations.

There is potential to expand within this market through the formation of partnership with existing Indigenous Cultural Awareness Training (ICAT) providers.

The following outlines existing providers within Victoria:

- Kangan Institute
- Cultural Heritage Solutions (CHS), Boonwurrung Foundation Ltd
- Moloka Pty Ltd
- Moondani Balluk, Victoria University
- Swinburne University
- The Storyteller
- The Yettica Group
- Wandaje Consulting
Budj Bim’s local Indigenous organisations may also directly establish a locally managed Indigenous Cultural Awareness Training course, targeted to large business organisations, peak organisations, educational institutions, state government agencies/regulatory bodies and local governments. Such programs may target larger corporations in nearby Hamilton and Warrnambool, as well as the metropolitan centres of Geelong and Melbourne.

The GMTOAC and WMAC corporations may also form partnerships with existing corporate events organisers to hosts training and retreats within the Budj Bim tourism landscape. There exists an opportunity to service the market through a niche and differentiated focus to hosts existing business retreats, within the nature-based and Indigenous heritage setting of the landscape. Tourism Research Australia data indicates that Victoria hosted over 77,000 business visitors undertaking training and research in 2011.

Education Market
Given the unique archaeological preservations, rich Indigenous heritage and natural landscape, Budj Bim has the potential to draw niche visitor segments seeking educational programs in Indigenous heritage, Indigenous cultural awareness and Australian history. Major education visitor markets have been identified including primary school visitors, secondary school groups and tertiary educational groups.

Primary & Secondary Schools Groups
The Budj Bim landscape and tours provide students with a rich educational experience of Australian Indigenous history and wildlife experience. At present, school groups represent a significant proportion of existing visitation to the Budj Bim National Heritage Landscape, sustaining 27% of visitation in 2009 (or 178 student visitors). Research indicates that Budj Bim is currently capturing 4.2% of the school student market potential; the ABS 2011 Census indicates that the Budj Bim Landscape is situated in a catchment area of 4,265 students (including 2,130 Year 5-6 students and 2,135 Year 11-12 high school students) within a one and a half hour travel time.

As part of the new national curriculum to commence operation in 2013 there are several prescribed learning disciplines that would relate to the key themes identified for the Budj Bim National Heritage Landscape. These areas include:

- The Arts
- Geography (humanities)
- History (humanities)
- Science

The education market for Indigenous heritage is currently dominated by visitation to the Brambuk Cultural Centre, which is well established and marketed as a State significant tourism product. Nevertheless, there is potential to successfully compete and expand into the market, through investment in tourism offer (e.g. multi day camping, natural conservation programs, Indigenous historical and cultural programs and interpretive displays) and a differentiated focus on Budj Bim’s unique assets (stone hut settlements, eel traps, fishing demonstrations, etc.)

Tertiary Education Groups
Budj Bim has strong potential to draw visitation through supporting field trips and ‘out of class’ educational programs on Indigenous cultural heritage, Australian history and environmental conservation. At present, the Budj Bim landscape is a featured within syllabus activities of a number of courses including Indigenous Peoples and the Environment and Indigenous Land Use (RMIT). A number of university courses may potentially undertake programs within Budj Bim.

Assuming an average of 20 students per course, the Budj Bim landscape has the potential to provide its educational offer to a total of 720 students per semester. Furthermore, improved partnerships and research programs within rich archaeological landscape of Budj Bim may support additional visitation from post graduate students, researchers and academics.

There may be potential to promote and establish the history of Budj Bim as a stand-alone course within a tertiary educational institution. At present, “The Lurujarri Dreaming Trail” is provided as an optional course within RMIT’s School of Architecture and Design. In this program, students have the opportunity to spend 9 days with the Goolarbooloo people of Broome (Western Australia) and undertake a walk through the Lurujarri dreaming trail. Significant efforts and investment would be required, to feature the Budj Bim as a similar course; these may include (but not limited to):

- Accurate reconstruction and preservation of historical artefacts (e.g. stone huts, eel traps).
- Preservation of oral history (including undertaking an Indigenous tourism story audit).
- Preservation of recent history (e.g. the landmark native title settlements) for future generations.
- Development of infrastructure to support holistic visit and education throughout the whole Gunditjmara landscape, from the creation story of Budj Bim to the spiritual resting place of Deen Maar.
- Continued efforts to improve linkages with universities through research programs, course field trips and partnership projects.

Coaches & Tours
Coach and tour visitor markets represent the most significant opportunity to draw and sustain visitation and income to the Budj Bim region. The strategic location along the Great Ocean Road touring routes supports opportunities to negotiate Budj Bim as a feature of tours.

Tourism Research Australia data indicates that the Great Ocean Road region attracts over 68,871 annual coach tour visitors, with over half the market undertaking overnight (multi day) tours. The Limestone Coast Region also hosts a number of coach tourism opportunities, attracting 21,000 annual coach tour visitors; the market has high levels of linkages to the Great Ocean Road region, through supporting multi-day Melbourne to Adelaide tours. In total, TRA data indicates that the Budj Bim Heritage Landscape is situated within a market of 89,872 coach tour visitors.

Table 5 – Average Visitor Numbers Undertaking Coach Tours, 2009 – 2011

<table>
<thead>
<tr>
<th>Region</th>
<th>Great Ocean Road Region</th>
<th>Limestone Coast Region</th>
<th>Combined Markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight</td>
<td>250</td>
<td>33%</td>
<td>44,670</td>
</tr>
<tr>
<td>Daytrip</td>
<td>178</td>
<td>27%</td>
<td>38,833</td>
</tr>
<tr>
<td>International</td>
<td>164</td>
<td>21%</td>
<td>6,360</td>
</tr>
<tr>
<td>Total</td>
<td>648</td>
<td>100%</td>
<td>89,872</td>
</tr>
</tbody>
</table>

The following is a summary of key findings from review of existing Great Ocean Road tour itineraries:

Short Tour Market

- There exists a high level of competition as a featured itinerary item within the 1 - 2 day tour markets; tour itineraries predominantly consist of highly marketed and internationally renowned tourism products including the 12 Apostles, Otway Ranges and the Grampians National Park. Furthermore, Budj Bim would directly compete for itinerary placement against other Indigenous tourism products (Brambuk Cultural Centre, Tower Hill and Grampians Indigenous rock art).
- 1 day tours generally conclude at Loch Ard Gorge, before returning to Melbourne. Given the limited time available and the travel distance to Budj Bim, there is found to be limited opportunity to be listed as a featured itinerary item for the 1 day tour market.
Long Tour Market

- 3 day tour market generally consists of similar variations of itineraries to the 2 day tour market. The data suggests that there is capacity to include additional tourism visits and items within this tour market.
- Extended backpacker tours are found to be undertaken within 3-4 days between Adelaide and Melbourne. Itinerary items generally consist of tourism products and experiences that require minimal participation costs/fees for both tour organisers and backpackers, reflecting the lower costs preference for the market.
- Extended tours (4 days and above) generally target the premium luxury market. Tours are found to promote quality food dining, wine and luxury accommodation available in Warrnambool, Grampians, Coonawarra Wine Region and Kangaroo Island.

Retired Self-Drive Domestic Visitors

Tourism Research Australia has identified the retired self-drive domestic visitor market as a major segment of Indigenous tourism. The market represents a significant proportion of visitors to the Great Ocean Road and Broader Discovery Coast Region, suggesting opportunities to draw and disperse visitation to the Budj Bim region. TRA data indicates that between 2009 and 2010, the Broader Discovery Coast Region attracted over 93,600 on average of the visitor segment annually. Research recognises the visitor market as a major segment of Indigenous tourism, with the following key attributes:

- Visitors are aged 55 years or more
- Older non-working and retired
- Travelling for holiday purposes
- Staying in hotel accommodation (mostly standard hotel accommodation below 4 stars), caravan or camping
- Travelling by private car
- Travelling as adult couples

Retired self-drive tourists participated in several activities during trips, particularly social (visiting friend and relatives, shopping) and nature-based activities (visiting national parks, bushwalking, and caravan camping).

Compared to other visitor markets, visitors had less time constraints due to their longer average trip length (12 nights). Despite these findings, research has found that visitors only participated on 1.5 Indigenous tourism activities while travelling, namely the following:

- See any Indigenous art, craft or cultural display;
- Visit an Indigenous gallery; and
- See an Indigenous site or Indigenous community.

The following table depicts the average market capture of retired self-drive domestic visitors by state. Unsurprisingly, Northern Territory recorded the highest proportion of retired self-drive tourist undertaking Indigenous tourism activities at 9.74%. The data depicts that Victoria only captures 0.21%, the lowest market capture compared to competing States (New South Wales, South Australia and Northern Territory) and national averages; the data is reflective of the under development of Indigenous tourism product in Victoria, despite the prominence of the retired-self-drive market.

Other Special Interest Groups

There is potential to expand within niche organisations that demand for the unique natural and historical offer within the Budj Bim landscape. These organisations may include:

- Historical societies and heritage clubs
- Environmental and conservation groups
- Indigenous cultural organizations and reconciliation groups
- Bird watching clubs
- Photography groups
- Mountain bike clubs
- Old age social groups

Table 6 – Average Retired Self-Drive Market (By State), 2009 – 2011

<table>
<thead>
<tr>
<th>State/Region</th>
<th>Undertake Indigenous Tourism Activities</th>
<th>Total Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>New South Wales</td>
<td>14,667</td>
<td>5,656,533</td>
</tr>
<tr>
<td>Victoria</td>
<td>7,667</td>
<td>3,729,000</td>
</tr>
<tr>
<td>South Australia</td>
<td>3,333</td>
<td>1,715,667</td>
</tr>
<tr>
<td>Northern Territory</td>
<td>8,667</td>
<td>391,000</td>
</tr>
<tr>
<td>Total - Australia</td>
<td>50,000</td>
<td>14,842,000</td>
</tr>
<tr>
<td>Broader Discovery</td>
<td>Data n/a</td>
<td>93,600</td>
</tr>
<tr>
<td>Coast Region</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4.8 Tourism Product & Infrastructure Gaps & Opportunities

General Considerations

On the basis of the tourism analysis, the Master Plan should consider:

- Budj Bim Landscape offers a number of unique stories. Interpretation of the rich cultural heritage should form the basis for product development.
- The Budj Bim concept is much greater than four sites. The Master Plan approach must recognise the entire Budj Bim Heritage Landscape, from Mt Eccles to the sea.
- Budj Bim’s core appeal is not based on its landscape, like the Grampians National Park, Port Campbell or Wilsons Promontory. Its product and experience lies in an immersive Indigenous experience, cultural education and outdoor nature based tourism.
- The development of Budj Bim needs to be staged and linked to existing demand drivers, where product and experiences are developed to meet market segment needs and preferences. Development of commercial accommodation solely for the holiday/leisure market needs to be undertaken using a staged approach.
- Budj Bim is in proximity to a number of existing Indigenous products in western Victoria including Tower Hill and Brambuk. Budj Bim should not replicate these products, but develop its own niche experiences and build on its unique cultural heritage.
- The development of Budj Bim into a sustainable and economically viable product is of great importance to the Gunditjmara community as it will allow the economic independence, self-determination and preservation of their cultural values. These overarching values will help to define the Master Plan.
Sustainable tourism will play an important part in the future of the Budj Bim Landscape. Improving the quality and diversity of the visitor experience will lead to a greater level of understanding of the environmental and cultural values of the landscape and increase the amount of time spent on site, the number of return visits and the economic and social investment in this nationally significant place.

The tourism analysis is summarised in Section 4. A key finding of the tourism assessment is that Budj Bim has significant potential to attract more visitors and a wider range of visitor markets than it is currently attracting and that there is a long term potential to attract an even greater range of visitors as the range of facilities, tourism products and destinations increases over time.

5.1 The Tourism Target Market

The audit of tourism product in Shipwreck and Discovery Coast region (Glenelg Shire, Moyne Shire, Corangamite Shire and Warrnambool City) suggests that its tourism strengths are in nature-based experiences (bushwalking, trails, and wildlife), sea and water based tourism (fishing, beach, seaside holiday home establishments, whale and seal watching) and Indigenous tourism (Tower Hill and Budj Bim National Heritage Landscape).

The audit has found that there is strong potential for the Budj Bim National Heritage Landscape to be developed as a tourism destination which can draw and sustain visitation from a range of domestic and international target markets.

Target Markets
- Holiday / leisure markets
  - Domestic socially aware visitors
  - International experience seeker visitors
  - Retired self-drive visitors
  - Coach and tour visitors

Niche Markets
- Corporate/business visitors
- School groups
- Tertiary groups
- Postgraduate and research groups
- Special interest groups

5.2 Product Development Themes At Budj Bim

Interpretation
- Expansion of guided walking tours
- Multi-sport guided tour
- Self-guided interpretation

Nature–Based Activities
- Multi-sport guided tours – canoeing, hiking, mountain biking
- Events – multi-sport, food and Indigenous music events
- Art – programs and sales
- Cultural education programs
- Off-site regional activities including scuba diving, water based cruises and wildlife tours

Infrastructure & Facilities
- Accommodation: Self-contained accommodation [cabins], bunk house accommodation, safari camping and caravan & camping sites
- Interpretive / orientation centre that can provide information and structure visitor activities
- Multi – purpose room to support education, training and conference uses

Food & Beverage
- Portable food vendor at key visitor sites at specific times
- Commercial kitchen facility to support key accommodation and event uses
- Bush foods, particularly featuring eel and aquatic food products

Special Events
- Seasonal cultural events and festivals. Events could be programmed to take advantage of off-peak tourism times, existing events such as the Heywood Wood, Wine and Roses Festival or the Port Fairy Folk Festival or timed to coincide with environmental seasons.

Special tour products to suit specialist groups (eg Cruise ship market)
- Unique tour products and visitor packages including food / beverage / souvenirs and unique visitor experiences, potentially including one-off activities such as flights, diving, Aboriginal cultural activities and wildlife viewing that may not be a regular part of a tourism experience.

5.3 Long Term Product Development Opportunities

As the tourism market (and potentially the Budj Bim site network) develops over time there will be opportunities for new products and capacity upgrades to existing products and services including:
- Higher standard accommodation options in new locations
- Additional safari camping options
- Higher standard food / beverage / specialist souvenir sales in key locations
- Additional trail and interpretations activities
6.1 A Vision For The Future

The Budj Bim National Heritage Landscape should be managed in accordance with the IUCN (World Conservation Union) reserve management principles. These include preservation of the land in its natural condition and recognition of traditional owners in terms of their aspirations for the land, continuing land management practices, protection and maintenance of cultural heritage and benefit from enterprises established in the park.

The Budj Bim National Heritage Landscape should be recognised as one of Australia’s great National landscapes and (future) World Heritage landscapes, and recognised universally as a place with:

- A living Aboriginal culture and home to the Gunditjmara people.
- Unique natural landscapes with sustainable ecological and landscape systems.
- Internationally recognised cultural heritage values - values which link all cultures and people.
- Enriching and memorable experiences for visitors and guests - experiences that are unique to this place and to the Gunditjmara people.
- Strong and successful partnerships between traditional owners, governments and the tourism industry, providing world’s best practice in caring for country and sustainable tourism.
- Partnerships with regional, national and international cultural tourism sites and related institutions.

6.2 Guiding Principles

- The Budj Bim National Heritage Landscape will be recognised as one of the most significant natural and cultural World Heritage areas in Australia, offering visitors a range of enriching and memorable experiences that are inextricably linked to the south-west of Victoria and the Gunditjmara culture.
- Budj Bim is home to the Gunditjmara people. They will influence, manage and participate in the development of tourism from which they will gain economic and social benefit, at a pace and level they determine.
- All parties recognise and will seek to enhance the protection of Budj Bim’s diverse landscapes, ecological systems and internationally recognised cultural heritage sites.
- Aboriginal culture and the land on which it is based will be protected and promoted through well-managed tourism practices and appropriate interpretation.
- Respect for customary law and traditions will underpin all tourism decisions.
- Tourism should be a part of Budj Bim, not the dominant element within the Budj Bim Landscape. The progress and development of tourism will be undertaken in accordance with the wishes of the traditional owners and at a pace which is consistent with their own values and aspirations and at a pace and level which does not harm nature or culture.
- The Gunditjmara people may lease their land to Government or private entities to be co-managed as a national park or reserve in order to protect and manage its natural and cultural heritage, or to facilitate the development and management of approved commercial projects which directly benefit Gunditjmara people.
- The travel and tourism industry will have security of tenure, profitable investment opportunities and the opportunity to provide authentic and memorable visitor experiences, within the context of a commitment to respecting culture and country and to maintaining the ecological and landscape values of the site.
- All parties will respect the need for the Gunditjmara community to retain their privacy, to use their land for hunting, fishing and ceremony and to protect and hold private their sacred stories and sites.
7.0 The Master Plan Concept

7.1 The Strategic Approach
The Budj Bim Landscape is a mixture of national park and Aboriginal owned land that is largely undeveloped as an integrated site network and tourism destination. As a result, the Master Plan takes a comprehensive approach to the planning and management of the network and to the ways in which visitors will experience the place and the various layers and values which create the Budj Bim concept. The Master Plan cannot just be about tourism facilities and infrastructure.

7.2 The Compelling Place Narrative
Visitor experience in this isolated setting will be shaped by a narrative that ties together and explains the various elements that make up this place. That site narrative will be based around the story of the Budj Bim Landscape and the journey of the people who lived there – their unique relationship to the land. The story will be told in many parts, including creation of the Budj Bim landscape, adaptation of the landscape by the people who lived there, seasonal change, managing and harvesting the landscape, relationships with other indigenous people, invasion, war, dispossession, mission life, land rights and re-emergence as a living contemporary culture – the Place narrative must speak of the future. Story is the most important artefact of Gunditjmara history, it connects the past with the present and connects visitors to the people and the landscape. That story is linked to place at a site and regional level. Visitors will see and feel the landscape and understand the Gunditjmara stories within the context of the natural systems which define this landscape – the relationship between the volcanic cones and the path of the lava flow (a ‘source to sea’ or ‘crater to coast’ concept), the pattern of wetlands and waterways which made this a productive landscape, and the Darlot Creek system which links sites to the ocean, and beyond to Deen Maar, the final resting place of the spirits of Gunditjmara people when they die.

The story is not focussed on individual sites and artefacts. These elements are part of a larger story that must be told in different places within the landscape network – in the places where events happened or in the places that best express elements of the story.

The way in which the Budj Bim story is presented to visitors is an important expression of who the Gunditjmara people are. This is not a generic Aboriginal cultural story. This is something different, something that can’t be experienced in other places. This will be the essence of the visitor experience and the thing that makes that experience unique, memorable and meaningful.

7.3 General Master Planning Principles

Develop A Unique Budj Bim ‘Concept’
Budj Bim is a special place; a combination of environmental, visual, archaeological, cultural and spiritual elements across a broad landscape. Budj Bim will be seen as a multi-layered concept that extends beyond individual sites and archaeological site features. The way in which visitors experience the landscape and the culture will be equally diverse and this will be a point of difference and the essence of the ‘immersive’ visitor experience.

Develop sustainable environmental systems and authentic landscapes
The Budj Bim Landscape will be a fully functional and sustainable environment that is robust and capable of protecting the cultural heritage, flora, fauna, geomorphological, landscape and aesthetic values which are unique to this place.

The landscape will be seen as authentic and capable of expressing the environmental qualities which originally shaped the Gunditjmara lifestyle and engineering achievements. The Budj Bim landscape will be seen as a living environment that sustains a living culture, not as a ‘museum’ that houses remnant archaeological artefacts.

Develop an integrated landscape network
The Budj Bim Landscape will function as the heart of the Gunditjmara community and represent their cultural stories and relationship to the land. The current site network is physically disconnected in places and does not include coastal land at the mouth of the Fitzroy River. While the Master Plan recommendations are based on the existing site network, there is a major opportunity to build on the site network over time, through further land acquisition, leases or other agreements, in order to improve access, the quality and sustainability of environmental systems and the range of potential visitor experiences.
See Budj Bim as part of a regional network of aboriginal places

The surrounding region is a part of the Gunditjmarra cultural story so the visitor experience will include places beyond the existing boundaries of the Budj Bim Landscape, including Gariwerd National Park, Black Range, Mt Napier and the Tyrendarra coast. This regional network of Aboriginal places will help to identify the south west as a key Aboriginal cultural heritage region with Budj Bim as the iconic centrepiece of that network.

See Budj Bim within a broader cultural context

The Gunditjmarra culture will be seen as community of individuals linked to a place, not represented by a generic view of 'Aboriginality' based on cultural stereotypes. Budj Bim and the south west region will represent an iconic regional and national brand that sits alongside other iconic and nationally important Aboriginal cultural destinations such as Kakadu and Uluru.

Use ‘story’ as the basis for visitor experience

Not all cultural stories are expressed through remnant archaeological sites and artefacts such as stone fish traps. Memory and knowledge are also artefacts of Aboriginal history. The story will be about the Gunditjmarra people and their journey, not just artefacts that represent one part of that story.

The way in which the story is told is important. It says something about who the Gunditjmarra people are and what they value. The story must have a human face. The story must immerse visitors in the lives of the Gunditjmarra people and where possible, be told in the places where events and activities actually occurred – ‘show, don’t tell’.

Value remoteness

The Budj Bim visitor experience will be an immersive and nature dominated experience that separates visitors from the everyday tourism experiences of the region and allows visitors to use their imaginations as well as their senses to understand the place and the Gunditjmarra cultural stories.

Use design and management systems to express the special status of the place

Budj Bim will be seen as a place that represents the values of the Gunditjmarra people. The quality and design of facilities, the way in which the land is managed and the quality of the visitor experience will express the importance of Budj Bim as a place and a part of the visitor experience.

Develop a market specific focus

In order to build an economically sustainable model for the Budj Bim experience, the development of product and experiences will be based around a number of different target markets and a range of visitor products and experiences for each of those markets. This will build overall visitor numbers, disperse visitation throughout the week/year and generate a broad interest in the destination.

Use a ‘slow build’ approach to tourism development

The Budj Bim Landscape, as it currently exists, has a low level of tourism related infrastructure and product development. There is a need to build tourism markets, visitor numbers and site facilities progressively over time, through business partnerships and with available resources, rather than looking to meet all market needs in the initial tourism development phase. More complex, high yield tourism products and facilities will develop to meet expanding visitor numbers as tourism is established on site.

Utilise existing tourism and business networks

Budj Bim will not function in isolation as a business or as a tourism destination. The Gunditjmarra people will engage with the regional tourism industry to leverage the skills and capacities of other tourism businesses to build Budj Bim as a tourism destination.

Allow for a flexible range of development outcomes, investment models and timing

The Budj Bim Landscape is likely to develop as a tourism destination over time and through a mixture of investment models, business partnerships and tourism products. Adopting a range of facility development and siting options in different locations will allow the commercial market to find its own entry point as the visitor market grows and avoid a situation where all future development actions depend on a specific development sequence that may or may not occur as expected.

Develop capacity within the Gunditjmarra community

Budj Bim is home to the Gunditjmarra people. They will influence, manage and participate in the development of tourism from which they will gain economic and social benefit, at a pace and level they determine. The development of business participation and training opportunities will be seen as an integral part of any Budj Bim business or tourism initiative.

Achieve financial support for the long term development and maintenance

The Budj Bim Landscape is at the beginning of a longer journey that will include environmental rehabilitation, infrastructure development, multi-layered tourism and potentially further land acquisition. The process will require ongoing financial support and investment from a range of private and public sources.
This section describes the design systems that form the basis of the Budj Bim Master Plan. Precinct objectives and individual site development projects are described in Section 9.

8.1 Site Planning Framework

Budj Bim is a large landscape network with a range of access points and visitor destinations. The network requires a planning 'structure' that supports site development, tourism product development, marketing and visitor orientation. The site planning framework is based on the following elements.

Road Corridors – are main roads passing through the Budj Bim landscape network. Main road and trail systems will provide visitors with their first impression of the Budj Bim Landscape and are an opportunity to engage visitors and provide a first level of site interpretation.

Road Access

- The Budj Bim site network will be linked by a central road access ‘spine’ which will function as a Budj Bim Tourist Road and as a scenic drive between the townships of Macarthur and Tyrendarra. This road will provide the main point of access to each of the sites that make up the Budj Bim Landscape. The road will also help to visually orientate visitors.
- The new main tourist road landscape also has the potential to function as a form of ‘avenue of honour’ that commemorates the value of the landscape to the Gunditjmara people. Elements of the original site landscape such as indigenous planting, wetlands and creek crossing landscapes should be reinstated where possible in significant locations to provide a visual representation of the original Budj Bim landscape.

Trail Access

- Visitors will explore sites by foot where possible to gain a sense of the Aboriginal lifestyle and way of seeing the landscape. Landscape and environment should dominate the visitor experience, not infrastructure.
- There will be linked access between the various sites. Budj Bim must be seen as a landscape ‘system’ rather than as separate sites. Visitors should move through the landscape in a way that explains that relationship.

Water Access

- Creeks, wetlands and coastal waterways form an important part of the Budj Bim landscape and the Gunditjmara story. Water based access should be a part of the visitor experience.

Precincts – are areas that have a number of interrelated sites and attractions. Each precinct will provide a suite of visitor experiences with unique points of difference within a geographical setting. By promoting individual precinct based experiences along with the overall Budj Bim concept, visitors will be encouraged to plan longer park stays with multiple destinations or return visits. Four Precincts have been defined (refer Figure 28). Key development actions for precincts are described in Appendix A.

Sites – are visitor destinations with specific features, infrastructure and visitor experiences. Visitors are likely to go to a series of sites as part of their Budj Bim experience. Key development actions for sites are described in Section 9

Hubs – are developed tourism nodes (focal points) within sites. Two Hub locations have been identified – Lake Surprise and Lake Condah – these locations provide essential services and commercial uses that support visitor use within a Precinct (not every precinct has a hub).

Off-Site Tourism Destinations – these are regional destinations (nature-based and cultural heritage settings) that are integral to understanding the Budj Bim story and the culture of the Gunditjmara people. These will provide a range of activities that provide a richer visitor experience and extend the time that visitors spend in the south west region. The regional network of Aboriginal places will help to brand the south west as a key Aboriginal cultural heritage region with Budj Bim as the iconic centrepiece of that network.

Key regional sites that explain Aboriginal cultural heritage and landscape creation stories include:

- Gariwerd National Park – rock art / creation stories / Aboriginal communities
- Black Range State Park – rock art / creation stories / Aboriginal communities
- Langhi Ghiran State Park – rock art / creation stories / Aboriginal communities
- Mt Napier State Park – creation stories / geology
- Tyrendarra coast – Budj Bim stories / Gunditjmara culture
- Portland Bay – Diving based activities / geology / environment
- Deen Maar – Gunditjmara culture / geology / environment
- Conving Ground – Cultural history & conflict
- Tower Hill – Gunditjmara culture / trading / landscape & environment

Nature based tourism sites that are likely to generally support regional tourism include:

- Annya State Forest – nature based tourism & leisure activities
- Lower Glenelg National Park – nature based tourism & leisure activities
- Cobboboonee National Park – nature based tourism & leisure activities
- Cape Bridgewater & Discovery Bay Coastal Park – seal watching / environment
Figure 27. Budj Bim Landscape – Proposed Regional Cultural Heritage & Nature Based Tourism Network

Figure 28. Budj Bim Landscape – Proposed Key Tourism Precincts & Development Opportunities
Figure 29. Budj Bim Landscape – Proposed Road Access

Figure 30. Budj Bim Landscape – Proposed Trail Access
8.2 Design

The Budj Bim Landscape is of National Heritage and (future) World Heritage status. The design of infrastructure is an expression of that status and the values of the Gunditjmara people. Design quality and style can provide a point of difference between the Budj Bim Landscape system and typical national and state parks and become an important part of the Budj Bim Brand.

**Design Quality**

Physical design within the Budj Bim Landscape should be unique and site specific. It should express qualities that relate to Gunditjmara culture and their relationship to the landscape and environment of the site.

Design quality must be considered part of the user experience, site brand and identity. Design must be developed in conjunction with the Traditional Owners and where possible, they should be engaged in all phases of the design, fabrication and construction.

**Site Works**

Designs should be simple, contemporary design that is functional, robust, durable and easy to build. Structures such as boardwalks and interpretations points should fit the shape of the landscape and ‘touch the earth lightly’ with an absolute minimum of site grading, rock and vegetation removal and drainage changes. The landscape must always be the dominant element.

**Structures**

The architectural approach for Budj Bim will be based on a modular design approach that can be shaped to individual sites and changing needs. Generally, the design of structures will be based on the following principles:

- Design will be based on a simple, pared back technology that requires a minimum number of trades and can be pre-fabricated in sections off-site using local skills and common, durable materials. There is potential for this to become a Heywood based Gunditjmara business.
- Structures will be place specific and express the qualities that the culture values. Design should be low scale and open to the landscape. Structures should not separate people from the elements and the setting (no glass enclosed areas). Structures should acknowledge the nature of the environment and seasonal change through ephemeral / changeable building elements that can respond to changing site conditions. For example movable wind screens, walls and shade structures.
- Structures will be seen as a community of functional spaces where the areas between structures have a purpose and are of equal importance to the built elements.
Structures should have a capacity for change and adaptation over time to suit new needs. A modular approach to building will allow for an increase in capacity and for the reshaping of building settings over time, or for the replacement of structures after fire and flood.

Interpretations modules at key tourist sites will be based on a deck system with a sheltering element with partial or movable walls – decking will be the unifying element and allow visitors to be elevated above flood levels, snakes and leeches.

The approach to design and construction should avoid:

- Site works that create significant change to ground surface levels, surface rock distribution, drainage patterns and vegetation.
- Large scale structures that dominate the landscape.
- Generic structure designs that are not place specific, or that are typical of National Parks.
- Long distance visual impacts, for example visitors being able to see long distance views of toilets or structures from public roads or trails etc. This should be a subtle landscape that constantly ‘reveals’ itself.
- Situations where viewers in one location look toward or over visitors or infrastructure in another location. Visitors must appear to be ‘alone’ in the landscape.

8.3 Branding & Identity

A separate branding and marketing study must be completed for the Budj Bim Landscape. The following elements should be considered:

**Site Status**

- The Budj Bim Landscape must have national icon status to rival Kakadu or Uluru and be seen in that context – as an elite cultural heritage destination with unique qualities that cannot be seen elsewhere. It will present to visitors as a ‘world class’ tourism destination and as a place with universal relevance to all cultures.
- Site systems will demonstrate internationally recognised performance standards (UNESCO World Heritage listing guidelines) for facilities, management and monitoring systems, interpretations systems, research programs and educational support networks that are typical of world heritage sites.

**Cultural Identity & Authenticity**

- There must be a regional identity to Aboriginal culture that is linked to the concept of distinct, place specific cultures with individual stories. Aboriginal culture should not be seen as a generic thing with repetitive themes and generic stories, for example boomerang throwing and bush foods. These are legitimate elements of Aboriginal culture but they do not have to be the defining elements.

Regional Promotion

- The South West region and Budj Bim itself must have a brand identity and marketing relationships within all relevant domestic and international markets. It should function as a part of a larger tourism network with links to Melbourne regional, state, national and international facilities and places.
- The Budj Bim Landscape and Grampians National Park should be promoted as the two dominant Aboriginal cultural places in the south west. Each should tell a different story in different ways. These destinations, and a range of second tier attractions, should be used to define the south west region as the premier Aboriginal cultural heritage destination within south east Australia.

8.4 Interpretations

The style of site interpretations is an important and potentially defining element. It must be a unique and memorable part of the visitor experience.

The nature and location of interpretation will be shaped by story

The Budj Bim Landscape is defined by the stories related to the place. This story includes off site places (places that are not currently a part of the Budj Bim Landscape), historical events, movement pathways, seasonal change, relationship to other people, events and a range of other landscape settings. The interpretive story must relate to a range of places and times and be told in different places – the places where things happened or can be best represented.

**Gunditjmara people are the story**

The people and their journey are the story and the common link between the environment and archaeological artefacts. Stone artefacts are only one part of the wider story. The story should be told in a personal way – through the eyes of the people and their personal experience – not only through events and artefacts.

The landscape and the culture must have a human face. The stories must be told in a way that fits the culture. The concept of ‘home’ for Aboriginal people embodies place, landscape, natural systems, movement and time, personal relationships, ritual, seasonal change and dreams. That relationship must be represented and interpreted to the visitor using all the senses.

The historical story must evolve into a modern story. The current culture must be seen as being alive, resilient, growing, optimistic – not a culture of the past raking over the physical remnants of a place and a culture.

Aboriginal identity must be place specific

Gunditjmara culture must be seen as a place specific community with a unique culture, not in terms of a generic view of ‘Aboriginality’ based on a cultural stereotype. It is important that Budj Bim is seen as a very place specific experience, not in terms of generic Aboriginal cultural themes such as boomerang throwing etc.

The quality of interpretations facilities is important

On-site interpretations systems must represent a best practice international standard. Interpretations must suit individual visitor preferences, ages, languages and physical abilities. Facilities should include Wi-Fi information and self-guided information systems where possible, even where Budj Bim Tour guides are involved.

**Telling the story on site – ‘show, don’t tell’**

The Budj Bim Landscape has the potential to support a range of interpretations techniques to suit all visitor types. As an example, one style of interpretation that may suit younger visitors could be a ‘story book’ concept where younger visitors could be given oral history and potentially graphic images through the medium of stories about young girl and boy characters. Different places might represent different chapters in a book – a book which collectively represents the story of a place. These stories could be packaged into a series of books or electronic form and become a souvenir of the site visit.

**Telling the story off site**

Budj Bim should have a significant on-line presence that generates the interest of people who have never visited the site as well as for the ongoing interest of past visitors. This may include curriculum material, teaching aids, published research findings and a range of publications and art products. Budj Bim has the potential to be the focus of a series of television documentaries, books and other publications that promote the site and the wider Gunditjmara story.

8.5 The Role of Visitor Information Centres

The Budj Bim Landscape is located between major population centres and while Heywood is the closest town and the place with the most direct relationship to the Gunditjmara community, visitors will approach the site from a number of different directions. As a result, visitors are likely to source information about the site from a number of regional Visitor Information Centres and the role of these centres is important.
The Master Plan concept is that while all regional Visitor Centres will provide general information and booking facilitation functions, some centres may take on a specialist role in representing key elements of the Budj Bim story to visitors. Visitor Information Centres will provide an introduction to the Budj Bim Landscape and what it represents, not a stand-alone ‘attraction’ – the Gunditjmara story must be told by Gunditjmara people within the Budj Bim Landscape, in the places where it happened.

Budj Bim is a place with national and (future) world heritage status. Visitor Information Centres will ideally have a separate design element or section which focusses on the Budj Bim story, information, arts and crafts displays and sales items, along with computerised information and booking systems related to the Budj Bim Landscape. Visitor Information Centres may also function as training venues for Gunditjmara trainee guides.

**Key Visitor Information Centres**

**Heywood**  
This facility could provide the main link to visitors coming from South Australia and act as a regional base for nature based tourism. The site (currently subject to a separate study) will be the primary off-site source of information about Budj Bim and Gunditjmara culture. This will not be a Brambuk style facility, it will provide an introduction to the Budj Bim landscape, not be the ‘attraction’.

**Port Fairy**  
This facility could provide the main link to Great Ocean Road and Warrnambool tourism market and potentially have an arts and crafts focus, to complement the existing arts attractions within the town. There is potential for a small extension to the existing visitor centre building that could provide a permanent exhibition of Gunditjmara art, Budj Bim photography and temporary exhibitions, along with specialist information and product sales.

**Portland**  
This facility could provide the main link to the coastal tourism region and potentially focus on the European settlement history, conflict stories and the coastal / offshore elements of the Budj Bim story. Portland is likely to be the starting point for water based activities and other nature based tourism activities.

**Dunkeld**  
This facility could provide a link between the Budj Bim and Grampians tourism regions.
The Key Development Opportunities shown in Appendix A provide a description of each Master Plan Precinct and the key development opportunities, target markets and priorities linked to the key sites within each Precinct. Further details relating to proposed facility standards are provided in Appendix C.

The opportunities described in the table will assist in creating an important cultural, environmental and leisure destination for Victoria. A key outcome of this Master Plan will be to enhance the diversity of uses and high yield visitor experiences throughout the year within the Budj Bim Landscape.

The visitor experience will not rely on one tourism focal point. The Budj Bim destination will be seen as a large scale, diverse landscape with a range of places, stories and experiences to suit a range of interests.

Master Plan proposals are designed to be integrated with the existing uses and environment of each site and delivered through a combination of community, public and private sector funding sources and business models.

9.1 Future use opportunities

Day Use Facilities
Day use facilities include toilets, picnic and BBQ facilities, shelters, event spaces and similar elements that support tourism and recreational use. These facilities support the self-drive tourism market, extend the length of visitor stays, encourage movement between sites and provide low cost support for education based groups and other community groups. These facilities also provide a basis for many tour group activities.

Improvements to day use facilities are suggested for all key sites. They will provide a low cost starting point for a range of Budj Bim tourism experiences and can be developed incrementally as funds allow. The level and capacity of facilities (level of service model) corresponds to the number and type of users. These standards are defined in Appendix C.

Accommodation Uses
Possible accommodation uses have been classified within a ten level system, from remote camping to high level hotel accommodation. These standards are defined in Appendix C.)

The Budj Bim Landscape presents strong opportunities for a range of accommodation types to meet the needs of a range of users. Accommodation is an important support other tourism activities and to increase the length of visitor stay.

Accommodation proposals are shown in settings that are likely to support a wide range of tourism activities and where the physical impacts and access requirements of accommodation can be appropriately managed. These are candidate sites only and are subject to further design development and approval by the land owners. The actual number of accommodation developments, and the location and style of those facilities will be subject to market demand and will change over time as the tourism market develops.

In the short term there are immediate opportunities for:
- Camping and caravanning at Lake Surprise and in various Mt Eccles National Park locations
- Safari camping at Allambie and Kurtonitj
- Low cost cabin accommodation for visitors including families, education groups, corporate groups and others involved in recreation, education and cultural training activities at Lake Surprise and Lake Condah.

Over the medium to long term there are opportunities for:
- Higher quality eco-cabin accommodation at Lake Surprise and Lake Condah.
- Possible long term development of high quality, star rated accommodation for tourism, business, boutique health and other high end guest services in a Tyrendarra coastal location(s) linked to the Budj Bim Landscape. This development would depend on future land acquisition and the development of a suitable business model.

Access Facilities
Road and trail systems provide functional access and a range of tourism activities for visitors. They also provide a specific way of seeing the landscape which adds value to site interpretation and to the quality of the visitor experience. Roads and trails are an attraction and an activity as much as a service.

In the short term there are immediate opportunities for:
- Development of pedestrian trail and boardwalk systems within each of the major Budj Bim sites.
- Commencement of the Budj Bim Tourist Road that provides a central access spine that links the main Budj Bim sites.

In the medium to long term there are opportunities for:
- Completion of the Budj Bim Tourist Road.
- Development of a main Budj Bim Trail system that follows the Darlot Creek alignment and links to the Mount Eccles Trail system in the north, the Portland Bay coastal trail system to the south and the Major Mitchell Trail system to the west.
Cultural Uses

The Budj Bim Landscape is defined by its cultural values and stories and these will form the basis of the visitor experience. Interpretation based experiences will be realised through an integrated system, based on a combination of:

- On-site tours based on personal contact with Gunditjmara guides.
- Self-guided tours
- On-site interpretations, education and orientation facilities (Lake Surprise / Lake Condah).
- An education and training facility (Tyrendarra / Gilger Gunditj Visitor Place)
- On-site signage and displays (all sites).
- Live theatre and special events (Lake Surprise / Lake Condah Mission).
- On-line information services, including multi-lingual services.
- Regional Visitor Information Centres incorporating special displays and exhibitions related to Budj Bim Landscape (refer Section 8.6).
- Regional businesses involved in art displays, exhibitions, food and craft sales related to the Budj Bim Landscape and the Gunditjmara culture.

Education, Research & Training Uses

As a nationally important (and possible World Heritage) cultural heritage site, Budj Bim has the potential to be a centre for a range of formal education opportunities from primary school to tertiary education levels, along with research and cultural training. These activities may be entirely field based or centred on indoor facilities within the Budj Bim Landscape.

Potential educational, research and training uses within Budj Bim will include:

- Site specific school day programs related to Gunditjmara cultural heritage, settlement history, environment and ecology (all sites, including ecological reference areas).
- Extended school programs supported by accommodation, on-site interpretations, education and orientation facilities (Lake Surprise, Lake Condah, Tyrendarra / Gilger Gunditj Visitor Place).
- Tertiary education programs (as per school programs)
- Ecology and geology based walking tours (all sites)
- Wildlife watching tours focussed on bird watching, Koalas, small mammals (Lake Surprise / Mt Eccles National Park).
- Aquaculture training (Lake Condah)
- Cultural heritage, archaeological and ecological research (all sites).
- Marine research (Portland Bay, Deen Maar).
- Dive training (Fitzroy River, Portland Bay)
- Freshwater ecology research (Lake Condah, Darlot Creek, Fitzroy River, Condah Swamp and Lake Gorrie)
- Climate change research (all sites).
- Corporate training related to cultural heritage (Lake Surprise, Tyrendarra / Gilger Gunditj Visitor Place).
- Meetings, workshops and small conferences (Lake Surprise).

The Budj Bim Landscape, along with the surrounding network of regional nature based tourism sites, has the potential to provide educational and training based activities that also include an adventure sport and leisure component including:

- Canoe and kayak trails (Lake Condah, Darlot Creek, Fitzroy River & Portland Bay)
- Mountain bike trails (Mt Eccles National Park and regional parks).
- Horse riding trails (regional sites).
- Underwater trails based on diving (Portland Bay).
- Boat based coastal exploration (Coastal sites)
- Programmed event spaces (Lake Surprise and Lake Condah Mission).
- Corporate training related to cultural heritage (Lake Surprise, Tyrendarra / Gilger Gunditj Visitor Place).
- Meetings, workshops and small conferences (Lake Condah).

Event & Festival Uses

The Budj Bim Landscape provides a range of settings that evoke stories of the land and Gunditjmara history. There is an opportunity to develop festivals or special events related to the landscape. These special events may be designed to coincide with the Aboriginal seasonal calendar or existing seasonal events such as the Heywood Wood, Wine and Roses Festival or the Port Fairy Folk Festival.

Events could include:

- A cultural festival based on the Gunditjmara community (Lake Surprise and Lake Condah Mission sites)
- Exhibitions of art works (sculptures within Budj Bim sites) or at regional galleries and Visitor Information Centres.
- Specialist food and beverage products linked to on-site accommodation and selected tour products.
- Temporary food / beverage sales at key venues (Lake Surprise), or during festivals and special events.
- Programmable event spaces (Lake Surprise and Lake Condah Mission).
- Interpretations and way-finding signage.
- Transport facilities including car parking, coach parking and infrastructure.
- Aquatic infrastructure such as jetty and water craft landing point (Lake Condah)
- Site utilities such as electricity, water and telecommunications, including WiFi in key visitor hubs, interpretations points and way-finding locations.

Retail uses are likely to include sales of:

- Locally indigenous food products such as smoked fish and eel products.
- Art works including woven products, paintings, photography and DVD material.
- Books, technical guides, educational modules, research findings and other print based material.
- On-line information and products.
- Souvenirs.
- Sale or hire of equipment or other goods connected to tour uses, such as waterproof clothing, GPS equipment, mountain bikes, watercraft or cameras (based in Heywood but possibly with a limited on-site presence at Lake Surprise).
10.0 Implementation Strategy

The Budj Bim National Heritage Landscape is currently used as a destination for tour groups (Budj Bim Tours), corporate training related to cultural heritage, by education and research groups (co-ordinated by Winda Mara Aboriginal Corporation) and by independent visitors accessing the Lake Surprise, Mt Eccles and Tyrendarra IPA sites. These uses operate within a limited range of sites and with minimal support infrastructure, which limits the long term sustainability and tourism potential of the Budj Bim Landscape.

Implementation of the Master Plan will occur progressively over an extended period of time based on available resources, the development of partnerships with private and public groups and the delivery of key infrastructure development programs.

Further detailed work will be required to establish the form and detail of various development and investment opportunities. This work will include further detailed design, consultation and negotiation with stakeholders and detailed financial analysis.

10.1 Implementation Principles

The approach to Master Plan implementation is guided by the following principles.

The 'slow build' approach.

Existing Budj Bim visitor numbers and site facilities are currently at low levels. Building the visitor market in the short term will allow more complex tourism products to develop over time to meet the needs of expanding visitor markets and increased visitor numbers.

Branding

Early Master Plan works will assist in shaping the Budj Bim brand to support growth in its tourism ventures. It is desirable for the Budj Bim brand to have a clear cultural and tourism identity at a regional, state and national level.

The way in which the Budj Bim story is told is important.

The Budj Bim Landscape is a large scale environment with a range of different physical features, landscape settings and seasonal changes. No single site encapsulates the whole Budj Bim landscape or its stories.

In order to provide visitors with a truly 'immersive experience' that is rich in detail, but intimate in scale, the Budj Bim story should be told across a range of settings and through different visitor experiences where possible. Tour groups should be kept at a small scale where possible.

The Master Plan also recognises that Budj Bim must provide some settings that are suited to short duration tour products and self-guided tourism. Lake Surprise and Tyrendarra IPA, as the most developed sites at this time, are suggested as venues that have the capacity to meet these needs in the short term.

A staged development strategy

At present, there is a low level of market awareness of Budj Bim as a destination which is likely to affect the nature of new tourism products in the Budj Bim landscape. It is envisioned that a long-term staged implementation approach can support significant visitation growth over time, along with an expanded market awareness and increased tourism development opportunities. This implementation strategy is based on the following approach:

- **Short term implementation** (Stage 1) will focus on raising the identity and branding of the Budj Bim National Heritage Landscape and expanding into the daytrip and bus/coach tour market. These early stage works will focus on investing in site infrastructure that supports a range of tour products as well as building business capacity and experience through new tour services and partnerships and positioning the Budj Bim Landscape for expansion into new markets and products.

- **Medium term implementation** (Stage 2) will focus on expansion into the overnight visitation market through capturing latent demand in the visitor markets. Establishment of the Budj Bim National Heritage Landscape as a World Heritage Site will also help to develop the visitor market and generate more complex tourism products and support infrastructure. Recent changes to legislation now allow for a wider range of private sector investment in Victorian National Parks. Government is best places to take the lead in facilitating an EOI process to secure investment for quality accommodation identified at Lake Surprise.

- **Long term implementation** (Stage 3) will focus on meeting increasing demand, diversification of visitor markets (Domestic Socially Aware and International Experience Seekers), whilst expanding its overnight visitation market and higher yield tourism visitors.

While a staged based implementation has been outlined, the timing of individual projects is flexible and can change to suit market demands and funding or partnership opportunities.

Building partnerships and business networks

Many of the new services and activities proposed in the Master Plan will be delivered and managed by the private sector, working with the Gunditjmara community, or through a range of government and community funded initiatives.

Gunditjmara Traditional Owners Aboriginal Corporation will establish business relationships with tour operators, regional tourism organisations, visitor centres, marketing networks and other complimentary tourism businesses. These business networks will generate and support stable levels of visitation through marketing and joint-venture agreements. These partnership based projects may potentially identify project priorities within the overall Master Plan framework.

Build a better landscape network over time

The Budj Bim Landscape network is currently a series of isolated sites with limited access and infrastructure. Over time there is potential to build the landscape network through further land acquisition and access changes. A larger and more integrated site network will allow further environmental improvements and a more diverse range of visitor experiences, tour products and facility options, including high level accommodation options. These possible changes are not reflected on the current Master Plan.
10.2 Visitor Markets & Development Timeframes

Given its long-term product potential, the Budj Bim landscape is ideally suited to target the broader visitors markets of the Socially Aware Domestic Visitors and International Experience Seekers, however immediate targeting of these markets without the availability of suitable tourism products and support facilities may jeopardise the establishment of Budj Bim as a key tourism icon and destination.

In order to target these broader visitor segments, the Budj Bim Master Plan proposes a staged process based on developing ‘up the value chain’ of tourism markets. Given the complexity and uncertainty of tourism development over a long period, the implementation strategy is guided by achieving target visitation levels for each development stage, rather than fixed timeframes. While the Master Plan actions are described on a stage by stage basis, the timing of individual projects may change in response to funding availability or market demand. The overall approach is based on the following:

In the short term, Budj Bim will continue to target its existing visitor markets (education, special interest, business/cultural awareness tourism visitors), while expanding into the self-drive and bus/coach tour market of the Great Ocean Road region. This will expand business and tourism experience within the Gunditjmara community. These uses are not the focus of the initial Budj Bim Tours and through partnership arrangements with established tour providers through the management of guided-tours and day-use facilities.

The target visitation over a period of 0 to 5 years is approximately 56,000 visitors annually.

In the medium term, the Budj Bim Landscape will continue to expand in the niche visitor markets (education, special interest, business/cultural awareness tours and self-drive and bus/coach tour market) and broader experience seeker markets through development of various accommodation products. These initiatives will support increased business and tourism experience through development of overnight accommodation facilities. The establishment of the Budj Bim National Heritage Landscape as a World Heritage Site will enhance development, marketing and branding initiatives.

The target visitation over a period of 5 to 15 years is approximately 86,000 visitors annually.

In the long term, the Budj Bim Landscape will be identified as a World Heritage site with established business and tourism networks and a mature range of tourism products. This status will support a larger number Domestic Socially Aware visitors and International Experience Seekers and the full establishment of Budj Bim as a national tourism icon.

Subject to further land acquisition and accommodation development, there is potential for a long term visitation level of more than 150,000 visitors annually.

10.3 Project Costs

An indication of likely project cost is shown in the Appendix D, Key Development Opportunities. The total investment to deliver all aspects of the Master Plan exceeds available public resources. The development of the Master Plan is aimed at providing the Gunditjmara community, government and the private sector with a framework that assists in describing how the Budj Bim Landscape could evolve and the opportunities for further investment over time.

The priority for available resources is to invest in those things that will enable and support visitor activity and environmental conservation within the Budj Bim Landscape by establishing key infrastructure and services such as vehicle access, boardwalks and interpretations. These facilities are likely to start small and expand in scale and complexity over time as visitor numbers and visitor needs change.

The project costs shown in Appendix D are based on an indicative scope of work or facility size that is likely to meet the minimum requirement for a facility in this setting. They are intended to provide a guide or ‘order of cost’ only. Each project will require detailed design and costing.

Accommodation and other major uses will evolve as market demand is established and opportunities arise. These uses are likely to involve private investment and partnership arrangements with the Gunditjmara community. These uses are not the focus of the initial stage of development, but can occur at any time – they are guided by market need, rather than a time-based program.

10.4 Stage Based Priorities & Key Projects

Stage 1

Key objectives of Stage 1 include:

- Developing basic site infrastructure and interpretations at several key sites to a quality that can support a range of tour based products.
- Branding and marketing of the Budj Bim National Heritage Landscape.
- Building business capacity and experience through expanding niche visitors market with existing tourism services and providers.
- Growing existing niche visitor markets (e.g., education, business/corporate, special interest groups) through existing tourism products and Budj Bim tour programs.
- Packaging of product to small group tour providers and linking to the Great Ocean Road and Great Southern Touring Route. Expanding into the daytrip and bus/coach tour market will define Budj Bim as a key tourism product in the Greater Discovery Coast region.
- Diversifying visitor markets types and developing a base into broader and higher yielding visitor markets (including Socially Aware domestic visitors and International Experience Seekers).
- Achieving target visitation levels to support the expansion into Stage 2 tourism developments and infrastructure.

Target Market

Niche visitor segments will remain the primary target market. These markets will enable the Gunditjmara community and their business partners to grow business capacity, experience and tourism visitation through guided tour experiences.

- The primary target market will be education visitors, corporate/business visitors, special interest groups, coach and tour visitors.
- The secondary target market will be Socially Aware Domestic Visitors and International Experience Seekers.
- Festivals and special events will be established as a way of engaging the wider community, marketing the Budj Bim brand.
Table 7 – Target Visitation By Indicative Market Capture & Visitor Segment - Stage 1 & 2

<table>
<thead>
<tr>
<th>Niche Visitor Segments</th>
<th>Stage 1 Total</th>
<th>Stage 2 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Market Size</td>
<td>Market Capture</td>
<td>Target Visitation</td>
</tr>
<tr>
<td>Self Drive Tourist Market</td>
<td>30,560</td>
<td>30%</td>
</tr>
<tr>
<td>Education Market</td>
<td>4,085</td>
<td>6%</td>
</tr>
<tr>
<td>Coach and Tour Visitors</td>
<td>89,872</td>
<td>15%</td>
</tr>
<tr>
<td>Corporate/ Business Visitors and Special Interest Groups</td>
<td>77,000</td>
<td>1%</td>
</tr>
<tr>
<td>Broad Visitor Segments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Great Ocean Road Domestic Socially Aware Visitor</td>
<td>1,630,000</td>
<td>1%</td>
</tr>
<tr>
<td>Great Ocean Road International Experience Seeker</td>
<td>290,000</td>
<td>1%</td>
</tr>
<tr>
<td>Total Visitor</td>
<td>2,120,457</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Business Development**

Development of business capacity and guided tour services will be a primary focus for this stage, along with the development of higher visitor numbers and yield. Visitor expenditure may also be generated through the establishment of festivals and special events commemorating Gunditjmara heritage and culture.

There are opportunities for the development of guided tour services through partnerships with private tour operators. In this model Gunditjmara guides (Budj Bim Tours) would contract to provide specialist cultural interpretation services to private tour operators, targeting higher yield groups seeking private, cultural awareness tours. This option is likely to facilitate greater generation of visitation and tourism value in the near term. Over the long term, with growth in business experience and capacity, operations of the guided tours may be transitioned to a wholly-owned and Gunditjmara-run tour business, with specialist services (e.g. boat tours, helicopter tours) contracted to private operators.

Opportunities for developing revenue streams in Stage 1:

- Commission and licensing fees from partnership arrangements with private tour operators.
- Revenue from cultural interpretation services and Gunditjmara-run guided tours and education programs.
- Ticketing and merchandise sales from establishment of festivals and special events.
- On-line merchandise sales.

**Organisational & Human Resource Development**

Budj Bim Tours will undertake a number of key organisational and human resource development initiatives to increase business capacity and support the objectives of Stage 1, including:

- Establishment of a tourism business manager to oversee the development and expansion of business opportunities and tourism products in the Budj Bim Landscape and the region. The business manager will also be responsible to the development of critical networks with tour operators and regional tourism organisations (RTOs).
- Establishment of formal and informal networks with other Indigenous tourism operators, regional tourism organisations, visitor centres, corporate/business training organisations and educational establishments.
- Continued expansion and development of Budj Bim tours and cultural interpretation (e.g. investment in professional accreditation and training of tour guides, continued support for intergovernmental partnerships with Elders and younger staff, extending tour activities to include demonstrated eel fishing and eel smoking).
- Investment in visitor market research and development of a clear and effective brand and marketing strategy for Budj Bim Heritage Landscape.
- Rezoning of key development sites to ‘Special Use Zone’ to support investment in tourism accommodation in Stage 2.

**Priority Projects**

Appendix A provides detailed descriptions of the site planning concept, facilities, change triggers and likely order of cost for each site within the Budj Bim Landscape. Some projects have a multi-stage implementation timeframe which suggests that the works are more extensive and will require multiple funding stages.

**Stage 1**

General priorities:

- Upgrade and development of day use facilities (e.g. toilets, signage, boardwalks, barbeques, bush foods garden and interpretation points) and events space across the Budj Bim Landscape. Day use facilities and interpretation points at Tyrendarra IPA and Lake Surprise setting are critical tourism products required for development in the near term. These facilities will support non-Gunditjmara run private tour operators and the development of tour visitation and visitor yield in the near term.
- Upgrade camping facilities to include powered sites at Lake Surprise. This will facilitate expansion of visitor nights to the region, specifically targeting extended guided tours from education groups, special interest groups and touring visitor markets.
- It is critical that base tourism product is developed to a level that is suited to sophisticated international experience seeker segments and domestic socially aware segments early in the implementation plan. This will position Budj Bim for expansion into new markets and products in later stages.
- Restoration of native vegetation, wildlife and historical water-bodies; and the reconstruction / renovation of historical sites and artefacts. This will support authentic nature-based and cultural Indigenous guided and non-guided tours of the landscape (a critical preference required for meeting the needs of the domestic and international Indigenous visitor market).

**Stage 2**

Stage 2 project works increase the capacity of projects developed in stage 1 and establish the Budj Bim landscape as a key tourism product in the Great Ocean Road region.

Key objectives of Stage 2 include:

- Support expansion into niche target markets through development of basic accommodation infrastructure
- Expand accommodation offer to support broader visitor markets (international experience seekers and domestic socially aware visitors).
Capture a segment of existing day trip and bus/coach tour market that seeks to undertake overnight accommodation in Budj Bim.

Establish the Budj Bim National Heritage Landscape as a key tourism destination in Victoria and the Great Ocean Road.

Achieving World Heritage listing status.

**Target Market**

Target markets remain unchanged from Stage 1, with a primary focus on existing niche target visitors and secondary target market of broader socially aware domestic visitors and international experience seekers.

**Organisational & Human Resource Development**

Budj Bim Tours will undertake a number of strategic initiatives in business and organisational development to support the Stage 2 objectives, including:

- Become established as a benchmark Indigenous Tourism Product in Australia, with industry recognition and awards in delivery of tourism services.
- Strengthening of linkages and regional promotion with other Indigenous tourism products and opportunities in south west Victoria. This includes Gariwed, Grampians and Worn Gunditj / Tower Hill.
- Contribute to the strengthening of Victoria as an Indigenous tourism destination in its own right, with place specific visitor experiences that differentiate Budj Bim from other Indigenous tourism destinations such as Uluru and Kakadu.
- Become established as a key Great Ocean Road destination for touring visitors, strengthened through investment in day visitor and overnight visitor facilities.
- Establish formal networks with national tour operators, national tourism organisations and high-level Indigenous business and economic development organisations.

**Priority tourism and infrastructure developments**

The focus of Stage 2 projects will be on the establishment of 2-3 Star self-contained cabins at Lake Surprise, servicing the education and corporate/business visitor market and boutique nature based tourism experience seekers. The establishment of the facility will also support initial expansion into higher yielding visitor markets that have preference for fixed accommodation, thereby diversifying the visitor base to Budj Bim National Heritage Landscape.

A range of other supporting projects are described in Appendix A along with suggested long term works (stage 3 works are described but not considered within the current Master Plan business planning and cost model).

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### Stage 1 Key Projects:

#### Lake Surprise

These works will establish the location as a tour ‘starting point’ and a place that provides an overview of the Budj Bim concept with special themes relating to geology and creation stories. This is a place that could support short duration tour products and special events.

1. A refurbished visitor interpretations building (existing structure), allowing a walk through experience. Displays will include a scale model of the Budj Bim Landscape, video presentations and limited artefact displays. ($100,000)
2. Improved toilet facilities ($100,000)
3. New multi-layered interpretations system around crater edge. ($40,000)
4. A new cantilevered lookout and walkway on the crater rim which functions as the trail start / finish point. ($100,000)

#### Lake Condah

These works will allow the site to function as a tour destination and allow effective site management of the area east of Darlot Creek. This provides a unique water based tourism opportunity.

1. New curvilinear elevated deck system to access key viewing locations within the site to facilitate the staging of special events and feature lighting of the Mission ruins. ($40,000)
2. Limited site interpretations to the Mission site arrival point. ($20,000)
3. Develop a toilet facility close to the vehicle arrival point. ($80,000)
4. Mains power and water will be supplied to strategic locations within the site to facilitate the staging of special events and feature lighting of the Mission ruins. ($40,000)

#### Kurtonitj

These works will establish Kurtonitj as a place that represents contemporary Gunditjmara history. This is a place that could support short duration tour products and special events.

11. Interpretations pathways and boardwalks. ($150,000)
12. New multi-level interpretations system within the site at key visitor destinations. ($50,000)

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### Tyrendarra IPA

These works will establish the location as a tour ‘starting point’ and a place that provides an overview of the Budj Bim concept with special themes relating to wetland ecology, food gathering and settlement stories. This is a place that could support short duration tour products and special events.

5. New curvilinear elevated deck system to access key viewing and interpretations points, including the wetland edge ($150,000)
6. New main visitor arrival space on both sides of Darlot Creek containing a modular based unit (raised on deck structure) including shelter / pergola structure / toilet / drinking water / interpretations features. ($150,000)
7. New visitor arrival space containing a modular based unit (raised on deck structure) including shelter / pergola structure / BBQ & picnic facility / drinking water / interpretations features. Existing sports facility toilets may be used by visitors (to be confirmed) or additional toilets provided. ($200,000)

### Convincing Ground

These works will establish the location as a place that represents military and social conflict and the wider settlement history.

18. Provide interpretations signage and parking at the arrival. point. ($30,000)

Based on the indicative project costs, the total for priority stage 1 works (not total stage 1 works) would be around $1,380,000. Note that project costs are for priority Stage 1 works only. Additional costs may be added in later stages to improve the quality and capacity of the infrastructure.
11.0 Business Feasibility

11.1 Costs-Benefit Analysis - Stage 1 & Stage 2

Figure 32 provides a depiction of the estimated total economic impact of additional visitor expenditure, Stage 1 and Stage 2 infrastructure costs estimates and the Net Present Value (NPV) of Net Economic Benefits over a 30 year period.

Stage 3 will be determined by long-term market trends, land acquisition activities and completion of the extensive prerequisites of infrastructure and strategic development items, beyond the scope of near term financial assessments. It is proposed that financial analysis of Stage 3 is undertaken at the end of Stage 2.

The data employs an 8% discount rate for a 30 year Net Present Value analysis. The cost benefit analysis indicates that over the timeframe, Stage 1 and Stage 2 infrastructure developments; as such, it is recommended that Stage 1 and Stage 2 infrastructure requirements proceed for development.

The economic benefits of increase visitor expenditure from Budj Bim National Heritage Landscape and surrounding regions, exceed the capital expenditure costs of Stage 1 and Stage 2 infrastructure developments; as such, it is recommended that Stage 1 and Stage 2 infrastructure requirements proceed for development.

11.2 Tourism Development Funding

Indicative construction costs are summarised in Appendix D. Stage 1 tourism developments are estimated to cost $1.64 million and Stage 2 at $3.68 million in capital works. Stage 1 and Stage 2 tourism developments represent a number of public infrastructure investments, and will depend primarily on external grant funding.

Recent changes to legislation now allow for a wider range of private sector investment in Victorian National Parks, subject to conditions. It is expected that the Budj Bim Landscape will be suited to a range of project types and investment models.

For example, it is envisioned that accommodation developments in Stage 2 and Stage 3 will be developed through a joint venture partnership or lease-hold arrangements between private investors, the Gunditjmara community and government. This will limit exposure to financial risk for stakeholders, while maintaining the financial sustainability of the Heritage Landscape and expanding employment opportunities for the Gunditjmara community.

Expanded tourism infrastructure (tours, the aquaculture and eel processing facility) may be financed through a combination of external grants and ongoing profits from the Budj Bim Tours and accommodation facilities.

Government needs to take a lead in the EOI process to facilitate investment and long term development of budj Bim as an iconic tourism destination.

11.3 Employment Impact

Urban Enterprise has undertaken an employment impact analysis of the forecasted visitor expenditure increases and flow-on economic benefits. Key findings suggest:

- The economic benefits of increase visitor expenditure from Stage 1, is estimated to support over 5 full-time equivalent (FTE) annual jobs on the Budj Bim landscape and surrounding regions.
- The economic benefits of increase visitor expenditure from Stage 2, is estimated to support over 15 fulltime equivalent (FTE) annual jobs on the Budj Bim landscape and surrounding regions.
- The economic benefits of increase visitor expenditure from Stage 3, are not calculated at this stage, but subject to the scope of long term development are likely to support significantly more full-time equivalent (FTE) annual jobs on the Budj Bim landscape and surrounding regions.
12.0 Management Systems

12.1 Business Model

Business development within the Gunditjmara community and the south west region is a key outcome of the Master Plan. The recommendation of the Master Plan is that a separate business unit with a Manager and allocated staff will be developed within WMAC or GMTOAC organisations.

All staff positions and business establishment costs will require an initial period of external funding (several years) to the point where the tour business is financially self-sustaining.

Budj Bim Tours Business Manager

The recommended management model requires a Budj Bim Tours Business Manager who could be employed by Budj Bim Tours Pty Ltd to work with tour operator/s and the Gunditjmara community to develop detailed tour products, visitor experiences and site access policies that meet the needs of the Community and Tour Operators.

Tour Guides

Tour Guides will be the face of the Gunditjmara Community and an integral component of the tour product and therefore the visitor experience. This is seen to be a specialist role, not a part time secondary or ad-hoc role.

12.2 Proposed Tour Management Model

The recommended tour management model is based on a system where general tour services are initially provided by a range of selected and licensed private tour companies, with Budj Bim Tours Pty Ltd providing specialist contract staff to conduct cultural heritage interpretation and other services.

The general system would be based on the following elements:

- A Gunditjmara guide will be contracted to provide cultural interpretation when this is required for specific site tours.
- External tour operators may conduct other forms of site interpretation, subject to their contract agreement.
- Tour operators will market the tours of the Budj Bim Landscape, provide all booking services, transport, specialist equipment (ie bikes), catering and ancillary services.
- Tour operators will form a contract with Budj Bim Tours Pty Ltd through compliance to a set of approved criteria, such as agreement to locations which can / cannot be accessed, scope of services and payment arrangements, etc.
- Gunditjmara guides are contracted by Budj Bim Tours Pty Ltd to provide guide services when requested by tour operators. Guides must comply with a set of criteria, including formal accreditation / training, adherence to dress code, etc. Gunditjmara guides may be employed by Budj Bim Tours Pty Ltd or contracted directly by the tour companies who have established a formal relationship with Budj Bim Tours Pty Ltd.
- A full time Budj Bim Tours Tourism Manager position would be established to liaise between the Gunditjmara community, GMTOAC, WMAC, the tour guides and tour operators, to build relationships with the travel trade and tour operators, to secure Budj Bim Landscape tours within tour programs and to perform a range of other tasks related to business development, marketing, tour product development, site development etc.

This model would not preclude Budj Bim Tours Pty Ltd responding to special tourism opportunities such as cruise ship visits, seasonal events, education and corporate markets that are not covered by the general tour market. These special tourism markets could be developed by Budj Bim Tours (acting as a separate tour provider) or in association with established business partners and tour providers.

Over the long term, and subject to the wishes of Gunditjmara Community and the capacity of the Budj Bim Tours Pty Ltd business, the proportion of internal versus external tour activities could change with more responsibilities, employment, marketing and business management responsibilities shifting to Budj Bim Tours Pty Ltd.

The advantages of this business model are:

- The business model is likely to facilitate a greater number of tours of the Budj Bim Landscape over a shorter development timeframe, generate a higher level of income for the Gunditjmara community and provide steady work for Gunditjmara Guides and others employed within the Budj Bim Tours business.
- The business model leverages private sector knowledge and resources to build skills, capacity and resources within the Gunditjmara Community so it can ultimately own and operate a successful tourism business.
- The business model will provide access to a wide range of markets through establishing arrangements with a number of tour operators. This will provide employment, training and experience for Gunditjmara guides and would potentially have flow-on benefits to other tourism ventures on the Budj Bim Landscape when established.
- Marketing, sales and business development would largely be conducted by the tour operators using established market networks.
- The system would leverage the profile and market penetration of existing tour businesses.
- The model will build skills and business capacity within the Gunditjmara community through access to the skills and secondment opportunities of partner tour operators.
- The arrangement can also work successfully if individual members of the Gunditjmara community start a tour operator business, provided that they are treated as a normal commercial operator.
12.3 Site Management & Monitoring Programs

The proposed Master Plan concept is based on a site management and monitoring strategy that is capable of meeting the needs of a site with national and world heritage values. The Budj Bim Landscape network will require an integrated approach to site management that recognises the 'systems' based approach to environmental management and the specific (and changing) management requirements for visitor facilities and activities.

The proposed Master Plan concept is based on the long term development of the Budj Bim site network and expansion of the network over time where possible through further land acquisition. On that basis, the management system needs to incorporate existing management plans and additional requirements to meet future conditions.

The Budj Bim Landscape network will be managed through a management framework that will include the following documents:

- **Ngootyoong Gunditj Ngootyoong Mara South West Management Plan 2013.**
  - This program focusses on:
    - Overall management guidelines for public reserves within the south west region
    - 5 year Implementation Plan focussed on the Stones landscape
    - 1 year Action Plan focussed on Mt Eccles National Park. The scope and priority of these works will be influenced by the Budj Bim Council and by issues raised in the Tourism Master Plan.
    - The management plan deals with public land only and does not address sites owned by the Traditional Land Owners

- **Budj Bim Master Plan (updated every 10 years)**
  - This Master Plan will function as a reference document to guide land acquisition and overall site development within the Budj Bim Landscape

- **Indigenous Protected Area Plans (updated as required)**
  - These plans will provide detailed design and management actions related to specific sites. These plans will form part of the overall Master Plan approach.

- **Budj Bim Landscape Management Plan (updated every five years).**
  - New management plans and programs will be required to address:
    - Changed management requirements arising as a result of future land acquisition, site networking changes and site buffering requirements (protection from external impacts)
    - Site specific environmental management actions or other matters not addressed through the South West Management Plan
    - Site specific matters not covered by existing management plans
    - Site specific requirements arising from the Tourism Master Plan (this document)
    - Site specific tourism impacts and management requirements related to tour products
    - Management issues related to temporary and event based site uses
    - Management and monitoring systems that are required to meet National and World Heritage

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**Figure 33. Management Framework**
Business Model Case Study: Nitmiluk Tours Pty Ltd

This Case Study has been taken from the report ‘Tours of the Budj Bim Landscape’ by Insight Communications + Street Ryan & Associates 2013.

Original Source: Indigenous Partnerships in Protected Area Management in Australia: Three case studies’ by Toni Bauman and Dermot Smyth, 2007

Nitmiluk National Park is located to the north-east of the town of Katherine approximately 350km south of Darwin in the Northern Territory of Australia. It occupies an area of around 292,008 ha and attracts around 240,000 local, national and international visitors per year.

In July 1993, the Association and the then Aboriginal and Torres Strait Islander Commercial Development Corporation (CDC, and now Indigenous Business Australia) entered into a joint venture with Travel North, a non-Indigenous private sector tour business, to operate the boat cruises within the Park on a 25:25:50 basis. Under the arrangement, the Nitmiluk Gorge joint venture partners undertook the executive management of the business and appointed Travel North to carry out the day to day management, administration, and marketing of the venture.

In 1995, the Association, using bank loans, bought out the CDC 25% share of the joint venture, moving to a 50% equity position and the joint venture assumed responsibility for the canoe hire activities in the Park.

In 1997, a number of major additions were made to Park infrastructure as part of the Gurruulk Master Plan for the development of the intensive use zone. This included the Nitmiluk Visitors Centre which provides not only information to visitors but is also the focal point of the commercial operations of the park. For the Nitmiluk Gorge joint venture, this represented an investment of some $1.5 million which was financed by a combination of retained earnings and bank loans.

In 2006, Nitmiluk Tours moved to the full purchase of all commercial operations at Nitmiluk (with the exception of helicopter tours), including taking over the Lelyn kiosk and campground which the Association purchased in 1997. Nitmiluk Tours business involves launch tours including sunset and sunrise meal cruises, canoe hire, walking and bush tucker tours, campgrounds, kiosks and a restaurant in the Nitmiluk Visitor’s Centre.

As part of the revised ownership and operations of the Nitmiluk Tours business, a General Manager who had previously worked in a similar position with Travel North was recruited, thus ensuring continuity and a seamless transfer in the management of the operations.

The Association also entered into a three-year management agreement with the Aurora Hotels, Resorts and Attractions group, which operates other tourism activities within the NT. Under this arrangement, Aurora provides overall day to day management, administration and marketing services as previously occurred with Travel North. The Nitmiluk Tours General Manager reports to Aurora.

Overall executive management of the business is undertaken by Nitmiluk Tours via its Board of Directors. This Board comprises a majority of Jawoyn members together with its financial advisers.

The immediacy of the Association’s commercial interest and the ‘strictly commercial business’ approach of Nitmiluk Tours has forced the Association and Nitmiluk Tours executive members to confront commercial imperatives including issues around employment and training. The General Manager of Nitmiluk Tours also has a direct interest in the success of company, and noted, ‘I have to be successful because that’s how I get paid out.’

This immediacy works towards ensuring not only commercial success in the Park, but also a sense of Jawoyn ownership and accountability. Their effects at the ground level are noted in the comments of an Aboriginal Tour Guide: ‘It used to be them and us. Now it’s great, there are Aboriginal paintings on the boats and they have Aboriginal names and we feel part of it’.

The Park plays a fundamental role in attracting visitors to the region and contributes an estimated $50m to Katherine’s economy. Its Jawoyn Traditional Owners have won the respect of the Katherine community and joint management of the Park is generally held in high regard.

The Park also has bipartisan political support and has set a ‘high-water mark’ for Indigenous involvement and control in new Parks which are currently being developed in the Northern Territory.

Jawoyn Association Aboriginal Corporation aims to maintain the cultural integrity of the Jawoyn Nation, the Traditional Owners of Nitmiluk National Park; to control and protect traditional lands and culture; to achieve a measure of economic independence and a sustainable future in tourism by investing in the future in both human and capital terms; to plan for the long term; and to avoid the temptation to look for ‘quick bucks’. Its current draft business plan lists communication and liaison, support of Jawoyn identity, families and young people, education, land management, economic activities, and membership services as key activities.

Since 1989, Jawoyn Association Aboriginal Corporation have made the transition from having no commercial interests in the Park to having virtually full ownership of and a directive role in its commercial operations. Through its company, Nitmiluk Tours Pty Ltd, they have what one interviewee, referred to as ‘a cultural monopoly’ on revenue raising activities in the Park. They are the exclusive tour provider in the Park, and operate other business activities.

In July 1993, the Association and the then Aboriginal and Torres Strait Islander Commercial Development Corporation (CDC, and now Indigenous Business Australia) entered into a joint venture with Travel North, a non-Indigenous private sector tour business, to operate the boat cruises within the Park on a 25:25:50 basis.

Under the arrangement, the Nitmiluk Gorge joint venture partners undertook the executive management of the business and appointed Travel North to carry out the day to day management, administration, and marketing of the venture.