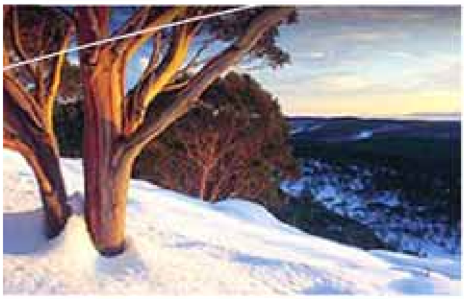
GIPPSLAND SUSTAINABLE TOURISM PROJECT

PART B

Business Development

MARCH 2007



Nexus Consulting (Aust) Pty. Ltd.
Economic Development & Agribusiness Consultants

26a Bailey Street BAIRNSDALE VIC 3068
Telephone (03) 5153 2366, Facsimile (03) 5152 3487
Email: nexus@net-tech.com.au

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1. Introduction

A partnership of the six Gippsland Councils, Destination Gippsland Inc and Tourism Victoria sought funding from the Federal Government to conduct a project to develop a sustainable tourism industry in Gippsland. The partnership was successful in attracting the funding in 2005.

The aims of the project were to deliver five key outcomes that demonstrated a 'whole of government' approach to building a sustainable tourism industry in Gippsland. The five key outcomes were:

1. Establishment of sustainable tourism business networks throughout Gippsland
2. Identification of new tourism business opportunities and potential tourism developments
3. Provision of baseline research to inform business strategies and to assist in attracting investment in the tourism industry
4. Development of a world class touring route to highlight Gippsland's tourism product strengths, focus co-operative promotion and marketing at a regional level and reinforce the Gippsland brand
5. Development of an infrastructure plan to support the tourism industry and to complement the touring route, including signage, visitor amenities, visitor information and beautification of towns.

The project was divided into three key sections:

<u>Part A – Baseline Research</u>

Aim - Provide baseline research to allow for development of informed business strategies and to assist in attracting investment in the Gippsland tourism industry

<u>Part B – Business Development</u>

Aim - The establishment of sustainable tourism networks throughout Gippsland

<u>Part C – Tourism Development Potential, Touring Route Concept, Development and Tourism Infrastructure</u>

Aim – Identification of new tourism business opportunities and tourism development projects, development of world class touring route and identification of development opportunities for tourism infrastructure in Gippsland

A consortium of consulting firms was appointed to undertake the different components of the project.

Part A - Urban Enterprise Pty Ltd (Lead)

Part B - Nexus Consulting (Aust) Pty Ltd

Part C - Tourism Destination Management Pty Ltd and Quercus Marketing

The section pertaining to business development for the Gippsland tourism industry is referred to as ‘Part B’ of the project. As detailed in the submission, the business development component of the project includes the following key outputs, consolidated into a report:

- Identification of existing, viable business networks for the tourism industry and network “gaps”;
- Mapping of regional and sub-regional supply chains for the tourism industry;
- Identification of supply chain gaps and potential new business opportunities arising from these gaps as well as opportunities to develop value chains;
- Identification of business skill areas that businesses require, both for employees as well as for business owners. Matching of business skills required with training programs (existing and potential) delivered by existing training institutions;
- Identification of businesses willing to participate in existing and potential supply chains, existing and potential co-operative purchasing programs and existing and potential business training programs.

To enable adequate consultation from industry and key stakeholders, a series of focus groups were conducted across the region in mid 2005. In total, ten focus groups were held in:

- Warragul
- Phillip Island
- Leongatha
- Inverloch
- Foster
- Traralgon
- Yarram
- Sale
- Lakes Entrance
- Cann River

In addition, face to face and telephone interviews were conducted with key stakeholders such as the Gippsland Area Consultative Committee, Tourism Victoria, tourism officers and associated businesses (supply chain participants (such as South Gippsland Catering). A number of follow-up interviews were also conducted with workshop participants who had further information and could add value to the project outcomes (e.g. Gippsland Racing). In total, fifteen face to face and telephone interviews were conducted.

The results of the research (desktop), focus groups and interviews have been combined to present the following information and recommendations. It is important to note that the focus of the project is to develop <u>Gippsland wide initiatives</u>, not at a sub regional and local level. A number of initiatives may be implemented at a sub regional or local level but the focus is Gippsland wide.

2. Summary of Recommendations

Action No.	Action	Responsibility	Possible Funding
1	**Project Implementation**		
1.1	It is recommended that a Gippsland Regional Tourism Association (G.R.T.A) be established to implement the recommendations and coordinate activities emanating from this project. The RTA should have representation from the key stakeholder groups for tourism (e.g.: DGI, GLGN, tourism officers, Tourism Victoria, and Parks Victoria). This organisation needs to be properly resourced in order to implement the strategies identified in this report. The establishment of the RTA should be undertaken by a Steering Committee which includes the Gippsland Sustainable Tourism Project Manager, General Manager Gippsland Tourism, GLGN, Tourism Victoria, Parks Victoria and DGI.	Sustainable Regions Project Committee	RDV / TV, all Gippsland Local Government Municipalities
2	**Business Linkages / Collaboration**		
2.1	Initiate a series of pilot projects (possibly 3) in conjunction with key tourism operator groups/organisations that have exhibited an understanding of the benefits that can be derived from cooperation and cooperative activities. Pilot projects should address different collaborative initiatives so that the process and results can be used by other groups in Gippsland.	Local Tourism Group/ Organisation	Regional Development Victoria, GACC
2.2	Regular communication updates be prepared and distributed to all industry participants and stakeholders	G.RT.A, GMGT	From operational budget
2.3	Develop a Schedule of events and functions to be held on a quarterly basis. The focus is to be on networking and professional development for industry participants. Could be undertaken in conjunction with Tourism Victoria Regional Development Victoria or Tourism Alliance	G.RT.A.	Sponsorship
3	**Adding Value to the Visitor Experience**		
3.1	As part of a Communication Strategy, regular information about the benefits tourism brings to the community is to be included. This information should also be sent to RTA's for local distribution.	G.RT.A.	From operational budget, Sponsorship

3.2	Review and update the database that is developed as part of this project every two years	G.RT.A.., TV	TV, GLGN
3.3	Conduct the Gippsland Tourism Exchange annually. At the conclusion of each event a review should be undertaken to continually improve and expand the event.	G.RT.A., DGI,	DGI, Industry
3.4	Conduct a project to map a value adding group in one local Gippsland tourism area. The project should document the current value chain and the benefits derived from participation by businesses. Develop and implement initiatives to support business growth within the value chain. Use the model in other areas within Gippsland	G.RT.A. Industry	RDV, GACC, Industry
4	**Best Practice**		
4.1	Identify examples of best practice in the industry (or relevant to the industry) and disseminate the information at networking functions. If supported, set up teams to benchmark and promote best practice.	G.RT.A. Industry	RDV, TV, Industry
4.2	Seek support from Tourism Victoria to be involved in the Tourism Excellence Strategy. Seek expressions of interest from Local and Regional Tourism Associations to participate in the program. Once selected, the G.R.T.A should assist in a facilitation role, where appropriate.	G.RT.A. TV	TV, Industry
5	**Business Skills**		
5.1	Work with Tourism Victoria and the Tourism Excellence program to implement the training modules that meet industry expectations and requirements. There are a number of government funded programs that can assist this process.	G.RT.A. TV, TA, Industry	RDV, Industry
5.2	Establish a working group with membership from the steering committee. Research previous programs (e.g. Aussie Host) and current programs that are available through training institutions (e.g. TAFE) and industry organisations (e.g. Tourism Alliance) to determine potential for establishing a Gippsland focused program.	G.RT.A. TV	DIIRD, TV, Industry
6	**Business & Development Opportunities Prospectus**		
6.1	Develop a circulation list for the Business and Development Opportunities Prospectus. The key target areas will be investors, developers, people looking at Gippsland as a potential business location and existing tourism business operators looking for expansion/new opportunities. Once circulated the G.R.T.A. should liaise with Local	G.RT.A. industry	From operational budgets

	Government Economic Development Units to capitalise on any responses as a result of the contact. The prospectus should also be posted on the DGI website and all of the Gippsland Municipality websites.		

3. The Region

The Gippsland region has a large number of tourism operator and industry organisations that provide various levels of representation. This representation can be at a regional level (e.g. Destination Gippsland), sub regional level (e.g. Experience Gippsland) and local level (local town/hamlet groups). The organisations can be tourism specific (e.g. Prom Country Tourism) whilst others have a dual charter (e.g. Lakes Entrance Business and Tourism Association, Yarram Traders Group).

The organisations and groups have varying levels of membership and commitment. The larger more established organisations, such as Gippsland Gourmet Country and Phillip Island Tourism, have a strong membership base, defined objectives and goals and have recognised achievements, whereas there are smaller groups, such as the Inverloch Tourism Association, trying to create momentum, develop a membership base and gain recognition. In between there are groups of varying size, membership and commitment by industry.

A key finding from the research and focus groups is that all of the groups and organisations are unique, have differing priorities and issues. It is important not to develop a range of activities on a 'one size fits all' basis as such an approach would result in non participation by many businesses and dilute the effectiveness of the activities.

However, there are a number key issues and opportunities that are relevant to all the businesses in the region and form the basis of the Gippsland wide approach to initiatives. These issues and opportunities are highlighted in the results of the focus groups.

The geography of Gippsland is an impediment to effective communication and dialogue between tourism business owners across the region. Tourism operators noted they have little dialogue with other businesses outside their area/shire. The distance and perceived lack of community interest were given as key reasons for the lack of communication and dialogue.

4. Business Linkages (Supply Chains)

The existence of business linkages enables businesses to supply goods or services to customers/clients. The 'links' in the chain provide the inputs and/or outputs that are necessary for the business to produce the good or deliver the service. On the input side, these links may include raw materials, transport, supporting services (e.g. financial, mechanical or professional services) or technology providers. On the output side, links may include transport, wholesalers or distributors.

As with all industries, the Gippsland tourism industry utilises business linkages to deliver products and services in the region. Interestingly, participants in all of the focus groups acknowledged the presence and importance of business linkages to their businesses. A full summary of linkage (supply chain) information is contained in the focus group summaries.

A number of key business linkage gaps were identified by the focus group participants, including:

- The use of networks and communication within the industry (including product knowledge)
- Workforce issues – particularly the attraction and retention of good skilled staff
- Related to workforce issues, the ability to attract appropriate training providers to deliver programs and courses to staff and business owners
- Public transport is a critical gap in a number of areas in Gippsland
- Lack of quality food providers (notably good restaurants and coffee shops) and conference facilities and commercial tour operators
- Investment capital

The linkages that provide goods and services such as food supplies, linen, plant and equipment are 'adequate' in that business owners expressed satisfaction with existing providers and the research revealed no major gaps.

There appear to be very few examples of businesses collectively purchasing goods or services to reduce the cost of the items. Whilst many businesses within organisations (e.g. B&B Associations) would require similar products there is no attempt to collectively purchase key items (e.g. cleaning materials). Key reasons for this lack of collective activity are:

- The office bearers of the organisations are business operators themselves and do not have the time to coordinate such activities
- Lack of recognition of the benefits
- Perception by individual business owners that they are 'different' or 'unique'
- Latent belief that all other businesses are competition (not stated directly)

There is an opportunity for local tourism associations or industry specific groups to promote and advocate the benefits of collectively tendering for goods and services that could assist the business operators and reduce the cost of operating their businesses.

There is an opportunity for Local Government to provide a coordination role for the dissemination of industry information and networking opportunities to all business owners and organisations across the region, via local and regional tourism associations. As stated above, lack of communication and networking opportunities are viewed as key gaps across the region by businesses. Whilst non prescriptive as to the type of communication and networking opportunities sought, business owners believe a greater focus on these services will increase business linkage efficiency.

An example of a proactive approach to addressing the linkage issues of workforce development could be the development of a relationship with key training and education providers to provide specialist programs to the industry Gippsland wide. A commitment from operators and business owners would create sufficient critical mass to attract funding support from government agencies (e.g. Under New Management) and institutions that can tailor special training programs to meet industry needs.

5. Adding Value to the Visitor Experience (Value Chains)

Adding value to the visitor experience differs from business linkages in that there is not necessarily a direct relationship between businesses to supply products or services to the customer. Where a business linkage will have inputs and outputs to a business to enable that business to deliver a product or service, adding value creates an 'atmosphere' within a town/community/sub region to enable the customer to have an experience and the businesses provide goods or services that add value to the experience

In respect to the tourism industry the existence of adding value within a sub region is important to the tourism industry in that tourists will form an opinion of an area based on all experiences, not just the accommodation and attractions. Therefore, the importance that services and traders contribute to the tourism value adding cannot be under estimated.

When successful, adding value to the experience also enables the tourism business operators within an area to maximise the yield from the tourists whilst they are in the area. For example, the use of value adding or on-selling in conjunction with other local businesses gives the visitor a greater experience and the businesses derive a greater yield.

The research and focus groups indicate that there is minimal recognition of the benefits that can be derived from businesses creating the additional experience, by local businesses. It also indicated that there are few formal activities operating across the region. The participants in the focus groups cited communication/networking as a gap, the attitude of traders/retailers as an impediment or that there is an opportunity for packaging – all these comments indicate that their current activities that increase visitor experience are weak or non existent.

There are a number of specific localities that do appear to add value/create experiences at some level (e.g. Yarragon, Phillip Island) but all areas have the potential to use this process to create growth and development in their local industry. Most organisations promote the value of tourism to their local economies in the media and to respective shires.

However, the role all businesses play in making the tourism experience holistic for the tourist has not been grasped by most businesses outside the tourism businesses. Exasperated tourism business owners lamented the inability to get the message appreciated by the wider community.

There is a key role for Local Government Tourism Officers and Local/Regional Tourism Authorities to continually promote the impact of tourism on local economies and the benefit that can be gained by working closer with the industry to the wider community. This message also needs to be conveyed to Local

Government Councillors on a regular basis so that tourism is recognised as a key industry.

One area that did use this process to great effect is the events activities at Latrobe City. The events coordinator organises/supports in excess of 600 events annually (100 significant events) and the business community and the general community support/participate in these events. A wide range of businesses benefit from the visitors participating in the events and actively support the Shire in its endeavours to attract new events. In this case, the adding of value to the visitor experience works.

There is very little recognition of adding value across different areas of the region. Whilst there is some informal activity at a local level, the research and focus groups did not reveal any cross regional activity. When prompted, most focus group participants expressed interest in getting information about other businesses in the region so that they can refer and provide a greater experience for the customer.

This lack of formal systems/processes is important in that the key objective of this project is to create a sustainable tourism industry in Gippsland with strong network and cooperative activities. A focus on adding value is needed to address this issue.

The integration of the results of Parts A & C of this project will assist in the development of these systems/processes. The research and analysis provided in Part A will identify industry and customers needs and demands and Part C will provide the route and development opportunities to combine the differing needs and demands.

A good example of addressing the need to create a visitor experience was the inaugural Gippsland Tourism Exchange. Businesses and operators expressed a desire in the focus groups to have a better understanding of the region's tourism product so that they could assist their customers to enhance their experience (and hopefully increase the yield). The level of support for the adding of value was evident at the Tourism Exchange conducted in the Latrobe Valley in 2005. Annual events of this type need to be conducted to enable tourism business owners (and other businesses) to meet and exchange information.

6. Examples of Best Practice

Throughout the research and focus group activity a number of examples of best practice in the region were noted. The following three examples highlight what can be achieved in the region.

In all examples strong leadership (including industry) is a key factor, Local Government has a role to support and nurture leadership within the community.

6.1 Gippsland Racing

Gippsland Racing was established to replace a number of existing race clubs, including Moe and Traralgon. All of the clubs were experiencing increasing budgetary constraints, declining membership and committee burnout.

Racing Victoria facilitated the amalgamation to create one entity to be responsible for the provision of executive services and funding support whilst maintaining individual committees at each of the clubs. This enabled local committees to have a sense of operational ownership and set strategic direction for the clubs whilst the costs of operation and funding are provided by Racing Victoria.

The executive is supported by a staff (including CEO and Marketing Manager) that provides services to the clubs. To create efficiencies race day staff move around to the different clubs for the race meetings. This has created a pool of experienced people who are employed for longer periods, thus reducing turnover of staff and the need to recruit/train new staff.

The stability in operations has also enabled Gippsland Racing to plan new types of events, such as 'Kids days' and provide greater levels of service and products. The result has been a steady increase in patronage and new types of customers (e.g. younger people) attending the race meetings.

<u>Key Success Factors:</u>

- Independent financial and human resource support for the racing clubs
  - Not beholden to the local committees
  - Adequate levels of funding and resource allocation
- Independent body (Racing Victoria) has the resources, authority & willingness to facilitate change
  - Ability to entice change with promise of resources
  - Can force change if necessary
- Critical mass and collaborative activities
  - Enough clubs involved to create opportunity for staff and collaboration
- Good strategic plan and experienced executive

- Well structured organisation with financial resources to employ quality people

6.2 Gippsland Gourmet Country

Gippsland Gourmet Country ('GGC') is an association of business operators located in West Gippsland. The membership of the association includes accommodation, food and wine providers, attractions, art and craft galleries and antique stores. GGC has continued to steadily increase its membership base – both in numbers and diversity.

GGC has a clear vision of what the group wants to achieve and has clear goals to achieve this vision. In addition GGC has strong financial support from its membership base, particularly in relation to joint marketing efforts and promotions.

Key Success Factors

- Clear vision and goals
  - Approached the development of the organisation in a 'business like' manner
- Achievable goals
  - A mixture of short term and long term projects
- Strong leadership
- Strong membership base – prepared to invest time and money
- Support from Shire (Baw Baw)
- Quality products and services

6.3 Creative Gippsland

Creative Gippsland was established to promote the concept of cultural tourism in the Gippsland region. All of the Gippsland municipalities participate in Creative Gippsland by providing funding and officer support for the group.

The Creative Gippsland network was launched in 2002 by the Gippsland Local Government Network, in conjunction with Arts Victoria and industry. The network is a good example of government and industry working together to achieve mutually beneficial objectives.

Reasons for Success

- Strong industry leadership
- Local government support – financial and human resource
  - Well resourced by local government and professional officer support
- Diverse range of quality products and attractions

- Consistent approach to cultural tourism across Gippsland
- No demonstration of 'snob' factor – that is all forms of creative expression embraced

- Collaboration (rather than competition) across the region – A key factor

6.4 Best Practice Traits

As can be seen from the three best practice examples, there are a number of common traits evident that should be considered. These traits include:

- Strong leadership – champions
- Well resourced. Successful organisations have adequate levels of funding
- Business approach to activities – this can include professional staff, good planning, realistic objectives
- Strong membership support – demonstrates commitment and assists in the financial stability of the organisations
- Capacity/ability to make tough decisions (particularly in Gippsland Racing)
- Local government/regional support

The changes in the tourism industry over the past decade have been dramatic and the industry needs to embrace this change to remain viable. A key part of this change is the need to identify and embrace best practice in all aspects of the businesses or organisations. A key role for Council Tourism Officers is to identify examples of best practice and disseminate the information to industry.

7. Summary of Workshop Results

The following is a summary of common issues raised/comments made by participants in workshop discussions. To be included the issues/comments were raised in three or more of the workshops. A copy of the notes from each of the workshops is included in Appendix 1.

7.1 Strengths of Sub Regions

1. The environment was raised in all workshops as a key strength of the sub regions. This included wildlife, clean/green, parks, beaches, waterways, natural features. Specific features included wetlands, snowfields, Wilson's Promontory, Snowy River and Gippsland Lakes
2. Climate was noted in a number of workshops as a key strength. In some, it was the milder temperature, for others it was the ability to have four seasons (and the accompanying diversity of activities)
3. The diversity of outdoor activities is seen as a key strength. Activities such as golf and recreational fishing were noted in a number of workshops. Other activities included adventure tourism, walks, cycling (particularly the rail trails across the region), bird watching and equine
4. The proximity to Melbourne was seen as a strength by those sub regions within two hours of Melbourne
5. The various regional tourism bodies/boards were noted as key strengths (or in some cases Local Government). The role and importance of these bodies was raised in five of the workshops
6. The importance of history and heritage was seen as a key strength in a number of sub regions. These included the first sighting of Australia by Captain Cook, Port Albert, Dargo, Port of Sale, Point Hicks, maritime and war museums
7. The strength and depth of the arts was seen as a key strength. This includes the artists, galleries, studios and event facilities
8. Interestingly, the 'under development' and lack of commercialisation was noted in four workshops as a strength. The implication being a more natural and genuine experience for the visitor.

7.2 Trends – Historical

1. The most profound trend that was reported in all workshops is the huge impact technology, notably the internet and email, has had on the industry. Many bookings come by email, people 'cold call' by email, people know all about the business (from internet research) before they call. It was also noted

that the internet had significantly reduced the tyranny of distance for isolated areas (e.g. Mallacoota)

2. All workshops reported an increase in the short break market – in some cases people coming more often but for shorter periods
3. All workshops noted that the expectations of visitors had increased. This was referred to as the 'sophisticated' tourist, the café/latte set,
4. The Shires closer to Melbourne noted a large percentage of day trippers
5. The increase in the 'grey nomads' was noted in most sub regions, it was also noted in a couple of workshops that this market was low yield. The rise in the number of motor homes was also noted, particularly in Sale
6. An interesting trend reported in a number of the workshops is the impact the weather has had on seasons. For example, some participants reported that shorter winter months had extended their season, others believe climate change benefits Gippsland
7. A rise was reported in the adventure/outdoor/experiential nature of activities undertaken by visitors
8. The coastal Shires reported a big increase in the seachangers/treechangers shifting into the region. These people require more services (e.g. restaurants) all year which is starting to create critical mass, which in turn will assist the tourism industry in general
9. It was also noted that the quality and range of accommodation had increased – this may, in part, be due to the younger, professional people moving into the industry

7.3 Trends – Future

1. All workshops noted that the trend towards short breaks will continue, and the expectations of visitors will continue to increase
2. The use of technology will continue to expand – probably into technology not yet developed
3. The packaging of product will expand – include a greater range of products – interactive activities will increase. Marketing will be redefined
4. Most of the sub regions reported that the number of festivals and events will increase in their regions
5. The standard and quality of product will continue to improve
6. The level of professionalism within the industry will increase
7. Nature based/experiential tourism will increase – thus needing services to cater for these visitors (e.g. bike hire) and commercial tour operators
8. Most sub regions believe that the use of trails will increase – rail trails, wine trails, arts trails

9. It was also noted that gourmet tourism will continue to develop – food and wine
10. The level of investment by developers/businesses will continue to increase (linked to point 5)
11. Day trippers and self drive tours will be important segment of market.

7.4 Business Linkages (Supply Chains) – Gaps

It is very difficult to combine the gaps in local business linkages across the sub regions due to the individual nature of the sub regions. Specific individual gaps have been noted in the individual workshop summaries, attached in Appendix 1. The following are general business linkages (supply chain) gaps identified across the workshops.

1. The use of networks and communication within the industry (at a local level) was raised in a number of workshops as a critical gap. Importantly, the participants noted the gap in product knowledge across Gippsland as a key issue
2. The ability to attract and retain good skilled staff was highlighted as a key gap in most workshops. A number of the sub regions have trialled different programs that should be reviewed
3. Ability to attract training providers to provide appropriate (i.e. targeted) training to staff and business owners was noted as a gap (and an impediment) that has a big impact on the capacity of businesses to increase standards and professionalism
4. A number of the sub regions highlighted the lack of public transport (rail, taxi, bus) as a key gap in their supply chains
5. Most sub regions noted the lack of food providers (particularly restaurants) as a key gap
6. Interestingly, five sub regions listed a lack of a conference centre as a critical gap in their local supply chains
7. Commercial tour operators and activity operators were highlighted in a number of the workshops
8. The amount of capital investment in the industry was noted as a gap in some areas

7.5 Relationships

As with the business linkage gaps, the relationships that exist in the sub regions are very specific to the particular sub regions. However, almost all groups noted the use of informal networks as key relationships within the sub regions and many noted the relationship with local government and state government (e.g. Tourism Victoria).

Interestingly, only one sub region noted relationships with areas outside the sub region in the discussions (and that relationship was with NSW towns). It would appear that relationships and links across Gippsland are not readily identified by the regions.

7.6 Impediments

As would be expected, the issue of government (planning, funding, etc.) was raised in many of the workshops as an impediment to industry development. For the purpose of this summary those comments have not been included but can be seen in the individual workshop summaries.

It is also important to note that many impediments are region specific and are noted in the individual workshop summaries. The following impediments were raised in three or more of the workshops.

1. The seasonality of the industry was raised in many workshops as an impediment (e.g. winter months in seaside areas). Seasonality impacts on the ability of operators to retain good staff through the quiet months and therefore impacts on the professionalism of the industry
2. The opening hours by trader/retailers in tourist areas was noted as a key impediment in many sub regions. In many cases businesses are closed when visitors are moving around the areas which impacts on the perception of the areas (e.g. cannot get a cup of coffee on a Saturday afternoon)
3. The issue of training (staff and business operators) is a gap but can equally be classed as an impediment. Many sub regions believe the lack of training is having an impact on the growth of the industry
4. The quality and adequacy of signage was noted by many as a key impediment. This extended to the need for an audit to clean up old signs and remove signs for closed venues/accommodation
5. The availability of good local food and wine is an impediment in many areas. Restaurants often cannot/do not offer local produce
6. It was also noted in a number of workshops that because of the nature of the industry (i.e. small operators) there is a high level of 'burnout' particularly for the local tourism organisations that rely on volunteers

7.7 Opportunities

The opportunities identified by the participants included a wide range of ideas – from ideas to address very specific local issues to ideas that could be undertaken across the wider region. For the purpose of this summary the following list of opportunities applies to the wider region.

1. Participants in all of the workshops endorsed the need for a greater awareness of each others products, including other sub regions product. The opportunity is to:

   a) Conduct a series of 'internal expos' to raise the awareness of all tourism product in the sub region to each other, local people and traders

   b) Conduct a series of 'external expos' to promote the tourism product of sub regions to each other

   These expos should extend to include quality local food and wine products

2. The packaging of tourism product was raised in a number of workshops as a tool to increase visitor nights and yield. The use of packaging across the wider region was seen as desirable

3. There is an opportunity for an accredited training provider to work with industry to develop specific training programs. It would appear that a number of organisations have attempted to establish specific programs or provide accredited packages to the industry in the past with limited success. Any new attempt would need to research past endeavors.

   This opportunity will, in part, be addressed by the Visitor Excellence Program developed by Tourism Victoria

4. Following on from point 3, many participants in the workshops believed there is an opportunity to create a new focus on customer service, given the acknowledged higher expectations of visitors. A number of participants referred to the "Aussie Host' program as having been successful

5. The introduction of annual awards for the industry was seen as a big opportunity (by some, a gap) for the wider region to raise the awareness, pride and professionalism of the industry. Interestingly, the Gippsland Business Awards were not recognised by participants

6. The quality of the food and wine of the wider region was noted in many workshops as an under developed opportunity in that there should be greater use (and promotion) of local produce/products in restaurants, cafes and take away outlets. Current initiatives, such as the Baw Baw/Cardina partnership to develop a signature dish and Regional Produce Directory, could provide direction for other sub regions within Gippsland

7. Most workshops identified the need for greater networking and communication amongst operators at a sub regional and regional level. Whilst it is the responsibility of local tourism organisations at a sub regional level, Destination Gippsland is focused on developing a strategy at the regional level for marketing activities.

8. The convention market was seen by many as a big opportunity for their sub region. However, this relates directly to one of the identified Supply Chain Gaps in that most sub regions lack any conference facilities of reasonable size.

9. There would appear to be a number of opportunities for commercial tour and activity/entertainment operators in many of the sub regions.

Specific opportunities that were raised in the workshops, but worthy of note for the wider region, include:

1. Confidential critiques of businesses by a group of experienced operators/business people to assist businesses to understand where deficiencies/opportunities existed and how to address the issues. These people would need to be independent of the business so as to prevent conflict. The program ran very successfully for a number of years in the Sale area.
2. A system of ‘relief managers’ should be established to enable business owners to take a break. Most tourism businesses are owner operated and the owners have difficulty in taking a break because they do not want to leave the business without proper management. This may be a business opportunity
3. A review of the airports, availability of hire cars, current packaging of tourism product and current use of electronic booking services in the wider region should be undertaken (in conjunction with the economic development units) to determine the potential for tourist packages
4. A mentor program should be established to ‘enlighten’ young people about the potential for employment in the tourism industry (possibly industry visits to schools). The mentors would include operators and people that work with the industry (e.g. catering suppliers). Another participant suggested that a pathway program should be established by Local Government and the State Government to assist young people
5. The sub regional industry (through local organisations) needs to identify future leaders in the industry and assist them.

8. Business Skills

As part of the workshops, a short questionnaire was distributed to all participants relating to the level of interest in increasing business skills. As can be seen from the Table below, training in marketing was rated as the most important followed by government funding, e-commerce/internet training and business planning.

Gippsland Sustainable Regions Project

Business and Training Program Survey

We would appreciate you completing this short survey to help us determine the level of interest in Business Skill programs. There may be opportunities to organise regional specific programs, possibly with State Government funding support for a number of the programs.

Would you and/or members of your staff be interested in attending any of the following courses or programs?

69 Yes **2** No

If yes, please indicate with a cross which course(s) you would be interested in attending:

19	Business Planning	**42**	Marketing	**20**	E Commerce
16	Customer Service	**7**	Time Management	**6**	Bookkeeping
8	Succession Planning	**11**	Quality Assurance	**22**	Internet
6	Employing People	**15**	Supply Chain	**36**	Govt. Funding
9	Managing People				

Other …**Budgeting/training/network techniques**

Timing

How long should these sessions be?

31	Two Hours	**27**	Half Day	**2**	Full Day

Do you have a preference for a particular day in the week?

Overwhelmingly mid week

As can be seen from the survey results business owners/operators would be interested in attending courses in marketing, internet & e commerce, and business planning and customer service. Interestingly, the greatest response was for information on government funding opportunities – this should be addressed by Gippsland Local Government, in conjunction with State and Federal Government.

8.1 Tourism Excellence Strategy

Tourism Victoria has developed a strategy to increase the professionalism and skill level of tourism operators. The strategy, known as *"Tourism Excellence,"* consists of seven modules specifically developed for industry. The modules are:

1. Understanding Visitor Needs and Expectations – customer service
2. People Excellence – Staff recruitment and retention
3. Business Excellence – training, skill development, awards
4. Growing Destinations – Best practice
5. Industry Participation – Getting people involved
6. Fostering Innovation – potential best practice
7. Sustainability in Tourism – Tie it all together

As stated by Tourism Victoria in its promotional material, "the strategy's implementation has been structured to allow industry to influence the direction of each module, by annually revisiting each module for a minimum of five years. Everyone has the opportunity to provide input based on what has been learnt from the previous twelve months. Each year the review should expand the circle of engagement and encourage raising the bar higher."

The program was launched in April 2006 and the first module will be ready for delivery in August 2006. Gippsland should take advantage of the training modules and participate in any pilot programs.

9. Recommendations

The following recommendations have been developed from the results of the research, focus groups and subsequent discussions with the Committee and stakeholders.

Recommendation 1: Project Implementation

A key issue identified during the course of the project related to responsibility for the implementation of the recommendations contained in the report. There is no single organisation that presently exists in Gippsland with overall responsibility for the development of tourism product at a regional level. Similarly, there is no organisation that presently exists in Gippsland with overall responsibility for professional industry development within the tourism sector. Destination Gippsland Inc is a regional tourism organisation but with specific responsibility for tourism marketing.

Many of the recommendations in this report relate to developing tourism product, tourism infrastructure and industry development at a regional level, across Gippsland. The lack of an existing organisation with responsibilities in these areas is a key issue in respect of implementation of strategies contained din this report.

Given the above, it is recommended that a Gippsland Regional Tourism Association (G.R.T.A) be developed to implement the recommendations and coordinate activities emanating from this project. The GRTA should have representation from the key stakeholder groups for tourism (e.g.: Destination Gippsland Inc, Gippsland Local Government Network, tourism officers, Tourism Victoria, and Parks Victoria). This organisation needs to be properly resourced in order to implement the strategies identified in this report. The establishment of the GRTA should be undertaken by a Steering committee which includes the Gippsland Sustainable Tourism Project Manger, General Manager Gippsland Tourism, Gippsland Local Government Network, Tourism Victoria, Parks Victoria and Destination Gippsland Incorporated.

Action 1.1
A Gippsland Regional Tourism Association be developed to implement the recommendations and coordinate activities emanating from this project. The RTA should have representation from the key stakeholder groups for tourism (e.g.: DGI, GLGN, tourism officers, Tourism Victoria, and Parks Victoria).

Responsibility: Sustainable Regions Project Committee

Possible Funding Sources: Regional Development Victoria/Tourism Victoria, all Gippsland Local Government Municipalities

Recommendation 2: Business Linkages/Collaboration

As discussed in the report, there are few examples of business linkages or collaboration amongst businesses within a defined geographic area or organisation.

Collaborative Activities

The research and focus groups revealed that there are numerous opportunities for the development and implementation of collaborative activities by tourism businesses in the region. Projects should be developed in conjunction with the tourism organisations to determine the potential for collaborative activities in selected locations. Examples of activities may include cost reduction (e.g. collective purchasing of materials), packaging or workforce development.

Suitable areas would include (but not limited to) Yarragon, Metung, Mallacoota, South Gippsland Wine Producers, B&B Associations, Gippsland Gourmet Country. A key component of any funding application should include industry support and/or contribution for the activities.

Action 2.1

Initiate a series of pilot projects (possibly 3) in conjunction with key tourism operator groups/organisations that have exhibited an understanding of the benefits that can be derived from cooperation and cooperative activities. Pilot projects should address different collaborative initiatives so that the process and results can be used by other groups in Gippsland.

Responsibility: G.R.T.A., Local Tourism Group/Organisation

Possible Funding Source: Regional Development Victoria, GACC

Communication

Communication for/between the industry across the region has been identified as a key gap. Communication includes updates, industry development information, funding opportunities and networking opportunities. This issue should partially be addressed by the Destination Gippsland Marketing and Communication Plan. To maintain relevance and position, DGI should ensure that industry and stakeholders are kept informed.

Action 2.2:

Regular communication updates be prepared and distributed to all industry participants and stakeholders

Responsibility: DGI, GMGT

Possible Funding Source: From operational budget

Networking

Most tourism business owners/operators participate to some degree in their local association. However, there are few opportunities to interact and network with business owners outside their group. In addition, there are few opportunities for business or professional development to occur in an informal manner. The success of events such as the Gippsland Tourism Exchange highlights the potential for greater networking.

Action 2.3

Develop a Schedule of events and functions to be held on a quarterly basis. The focus is to be on networking and professional development for industry participants. These could be undertaken in conjunction with Tourism Victoria, Regional Development Victoria or Tourism Alliance

***Responsibility*:** G.R.T.A

Possible Funding Source: Sponsorship

Recommendation 3: Adding Value to the Visitor Experience

Promote the Impact of Tourism

Media and Stakeholder Promotion

For the community to embrace the concept of tourism in regional areas it is important that there is regular dissemination of information, statistics, good news stories and event results. This communication needs to clearly articulate the benefits that tourism is bringing to the region and be undertaken regularly to reinforce the message.

Action 3.1

As part of a Communication Strategy, regular information about the benefits tourism brings to the community is to be included. This information should also be sent to RTA's for local distribution

Responsibility: G.R.T.A.

Possible Funding Source: From operational budget, Sponsorship

Database Update

The information and data compiled as part of the Gippsland Sustainable Regions project will provide a snapshot of the industry in Gippsland. However, this information will date quickly and needs to be updated regularly (eg. every two years) so that information being provided is accurate and current. It also enables new 'stories' to be developed to continually promote the industry

Action 3.2

Review and update the tourism industry data for the region at least every two years

Responsibility: G.R.T.A., TV

Possible Funding Source: TV, GLGN

Gippsland Tourism Exchange

The research and focus groups highlighted the interest across the region in the tourism product in other sub-regions. The inaugural Gippsland Tourism Exchange demonstrated the level of interest by industry in exchanging information and increasing the customer experience in Gippsland. This event should be conducted annually and built upon/expanded.

> ***Action 3.3***
>
> Conduct the Gippsland Tourism Exchange annually. At the conclusion of each event a review should be undertaken to continually improve and expand the event.
>
> ***Responsibility:*** G.R.T.A, DGI,
>
> ***Possible Funding Source:*** DGI, Industry

Value Adding Project

The benefits that can be derived from adding value to the visitor experience (e.g. increased visitor yield) is not fully understood or appreciated in most communities. A project should be undertaken in one Gippsland tourism area to map the value chain and develop initiatives that will enable growth of the businesses within the local area. This could include cross promotion (food and accommodation link), workforce (joint employment of staff) or special event. This model could then be used by other areas within the region.

This project should use industry cluster principles to support the development of the value chain. A good starting point is the East Gippsland Business Partnerships projects implemented in East Gippsland coastal communities in the late 90's.

> ***Action 3.4***
>
> Conduct a project to map a value adding group in one local Gippsland tourism area. The project should document the current chain and the benefits derived from participation by businesses. Develop and implement initiatives to support business growth within the chain. Use the model in other areas within Gippsland
>
> ***Responsibility:*** G.R.T.A, Industry
>
> ***Possible Funding Source:*** Regional Development Victoria, GACC, Industry

Recommendation 4: Best Practice

It became clear throughout the research and focus groups that there are numerous examples of best practice in Gippsland that could be used as a guide/benchmark for other groups and organisations. Where possible, these examples should be documented and showcased to tourism organisations and industry (possibly at networking events or the Tourism Expo)

Action 4.1

Identify examples of best practice in the industry (or relevant to the industry) and disseminate the information at networking functions. If supported, set up teams to benchmark and promote best practice.

Responsibility: G.R.T.A, Industry

Possible Funding Source: RDV, TV, Industry

Tourism Excellence Strategy

Tourism Victoria, in conjunction with industry and organisations such as Tourism Alliance, has developed the *Tourism Excellence* strategy. This strategy consists of seven modules that can be implemented by industry over a period of time.

The industry in Gippsland should take advantage of the program and be involved as early adopters. The experiences of the early adopters could then be used by others in the industry.

Action 4.2

Seek support from Tourism Victoria to be involved in the Tourism Excellence Strategy. Seek expressions of interest from Local and Regional Tourism Associations to participate in the program. Once selected, the G.R.T.A. should assist in a facilitation role, where appropriate.

Responsibility: G.R.T.A, TV

Possible Funding Source: TV, Industry

Recommendation 5: Business Skills

Training Programs

The tourism industry business owners and operators are interested in professional and employee development, however the focus groups identified that they are 'time poor' and do not have time to attend day long training sessions. Training programs need to be tailored to the industry and conducted at appropriate times (e.g. International Marketing Program).

Action 5.1

Work with Tourism Victoria and the Tourism Excellence program to implement the training modules that meet industry expectations and requirements. There are a number of government funded programs that can assist this process.

Responsibility: G.R.T.A, TV, TA, Industry

Possible Funding Source: Regional Development Victoria, Industry

"Gippy Gold"

In addition to training programs there is a need to increase the professionalism of the industry. This could be achieved by having a structure that provides training programs, possibly accreditation and bonus/incentive awards. In a number of the interviews and focus groups the participants referred to the Aussie Host program as an example of a successful program that provided the above.

There are a number of programs and courses that should be investigated to determine relevance and suitability for the industry. After research, a program outline should be developed for discussion with industry.

Action 5.2

Establish a working group with membership from the steering committee. Research previous programs (e.g. Aussie Host) and current programs that are available through training institutions (e.g. TAFE) and industry organisations (e.g. Tourism Alliance) to determine potential for establishing a Gippsland focused program.

Responsibility: G.R.T.A, TV

Possible Funding Source: DIIRD, TV, Industry

Recommendation 6: Business & Development Opportunities Prospectus

As part of the Sustainable Regions project a prospectus has been prepared containing information relating to business and development opportunities in Gippsland. The target markets for this prospectus are existing Gippsland tourism business owners, investors, developers and people looking to establish a business in Gippsland.

This prospectus should be promoted and utilised in conjunction with the implementation of recommendations contained in this report. It would be an appropriate role for the Project Implementation Resource to promote the prospectus to the target markets and to use the prospectus for business development opportunities.

Action 6.1

Develop a circulation list for the Business and Development Opportunities Prospectus. The key target areas will be investors, developers, people looking at Gippsland as a potential business location and existing tourism business operators looking for expansion/new opportunities.

Once circulated the G.R.T.A. should liaise with Local Government Economic Development Units to capitalise on any responses as a result of the contact.

The prospectus should also be posted on the DGI website and all of the Gippsland Municipality websites.

Responsibility: G.R.T.A, industry

Possible Funding Sources: From operational budgets

Appendix 1: Workshop Results

Phillip Island Workshop Report

Tuesday 14th June 2005

Churchill Island, Phillip Island

STRENGTHS OF SUB REGION

- Phillip Island Tourism Association (PITA) – good executive/stable/good value/good communication/add ons (e.g. website & marketing)
- PITA tries to cover surrounding areas
- Nature Park
- Proximity to Melbourne
- Wildlife/environment
- Grand Prix Circuit
- Diversity of activities

TRENDS – HISTORICAL

- Number of visitors has increased
- B&B market – increasing number of younger people with money
- Better range of accommodation
- Development of short break market
- Increase in international exposure (53% of visitors to penguins are internationals)
- Increase in the 'grey nomads' low yield
- Increasing trend towards high yield markets
- Increase in quality accommodation
- The Continental – increased business 25% last year – flow on to shops
- Nature Park numbers 'flat' to small decrease

TRENDS – FUTURE

- New products and services
- Leverage off 'icons'
- Increase in number of non residents moving into area – will require services all year that will assist industry (e.g. restaurants)
- Increase in daytripper market
- Phillip Island to become a destination in own right (rather than Gippsland)
- Destination Phillip Island (DPI) – package world class activities/profiles
- International and domestic visitors
- Level 1 destination
- Planning trends will change (e.g. golf resorts/will track development) – Issues for Council
- Self drive touring – State program
- Conference market will increase
- New level of packaging/branding/structure to provide constant recognition)

SUPPLY CHAINS – GAPS

- Printers – issues of volume/level of sophistication
- Staff – mindset of professionalism
- Training – have to source from Melbourne. Local not up to expected standards
- Transport – access to supplies/need for quality range of products (e.g. bedding/cutlery

RELATIONSHIPS

- Level of respect between businesses/operators
- Wine/art/B&B – knowledge levels could be better
- Tourism info centres/shire/industry
- Bass Coast Advisory Board
- Industry/Tourism Victoria – 3 year marketing plan
- Ties with Mornington Peninsular/Yarra Valley – trips and routes

OPPORTUNITIES

- Greater use of packaging
- Increase business owner skills
- Increase family market – as a destination – good yield
- Capitalise on government program (e.g. Tourism Victoria plan)
- More activity at Grand Prix circuit
- More events

IMPEDIMENTS

- Traders/tourism industry – culture of us and them. Traders don't see themselves as part of the tourism industry – leadership missing
- Participation by surrounding areas in campaigns/promotion
- Phillip Island subsidising outer areas ($)
- Organisational structures off Island struggle – difficult to get $
- Level of recognition in Melbourne and other areas
- Infrastructure is ageing (or non existent) – roads/signage/public transport
- Surrounding towns – level of professionalism
- Parking on Island – particularly in peak times
- Quality of service is variable – expectations are high
- Seasonality – doesn't allow continuous employment
- Variety of food products availability (e.g. fish & chip shops) – lack of planning
- Coaches don't stop in area

Inverloch Workshop Report

Tuesday 14th June 2005

The Esplanade Hotel, Inverloch

STRENGTHS OF SUB REGION
- Environment/beaches
- Developers with money
- RACV development
- Access to Melbourne

TRENDS – HISTORICAL
- Increase in daytrippers/weekenders
- More people coming across from the Latrobe Valley
- Greater affluence
- Short break market increasing
- Positive weather reports have generated enquiries
- Increase in family market

TRENDS – FUTURE
- Continued increase in visitor numbers
- RACV Resort – will have major impact on community
- Will be huge pressure on town by daytrippers/weekenders
- Impact of big developments in Wonthaggi (e.g. Aldi)
- Duplication of highways will shorten travel time from Melbourne
- Further urban encroachment

SUPPLY CHAINS – GAPS
- Conference facilities (of any size)
- Professional accommodation services
- Public transport (summer bus operated over summer holiday period)
- No local taxi service
- Not enough accommodation (within a 5km radius)
- Need links with other organisations that can support Inverloch

RELATIONSHIPS
- Conservation and development groups – level of antagonism between them – not good relationships
- Tourism group/traders – good relationship
- Tourism Victoria supported development of a leadership group for tourism

OPPORTUNITIES

- Need discussion as a community – village vs. holiday destination
- Relocate certain services (e.g. Church, footy ground) away from beachfront to edge of town
- Identify leaders and assist them
- Commence dialogue between conservation/development groups to create partnership

IMPEDIMENTS

- Membership fees – expectations by people – need to be realistic
- Funding an issue for association – membership numbers are low
- Fragmented approach to tourism/factional groups operating in Inverloch
- Parochial attitudes by Shires
- Planning activities by Council – inconsistent when reviewing developments
- Seasonality
- Hours people operate in peak season – insufficient – need education
- Retaining good staff
- Training (Council trying to get Chisolm to help)

Foster Workshop Report

Monday 20th June 2005

Foster Hall, Foster

STRENGTHS OF SUB REGION
- Wilson's Promontory
- Environment – clean/green
- Proximity to Melbourne (2hrs)
- Grand Ridge Road
- Beaches/wildlife
- Foster has evolved as a town with good customer service throughout year (still evolving)
- Accommodation trends increasing
- Local tourism body – Prom Coast
- Prom Country Brand
- Taste of Prom Country Festival – dedicated people and products
- Range of products
- Diversity of experiences in the region
- Attractive streetscape & murals/attractions – Mirboo North
- Great Southern Rail Trail
- South Gippsland Wine Trail
- Relationship between industry and local traders

TRENDS – HISTORICAL
- Short breaks
- Short time frame – bookings
- Increase in internet inquiries
- Expectations higher
- Experiential experiences – international tourist coming for 'full' experience
- People wanting more – prepared to pay
- Areas expanding rapidly (e.g. Yanakie)
- Accreditation
- Visitors predominantly from Melbourne
- Growing holiday house market for higher income people
- Prom Country accommodation at maximum occupancy
- The Gap closure – decrease in young people coming to the area
- Increase in the quality of cafes and food – provision of local produce
- Holiday houses – change in the way people are using them – more use in traditional down times
- Significant increase in sea changers/tree changers
- Greater spend per customer
- Climate change – winter shorter – extending seasons
- Decrease in international enquiries from Europe
- Change in focus for wine marketing

TRENDS – FUTURE

- Steady increase in tourism activity / will 'take off' as an area because of proximity to Melbourne (fuel prices)
- Southern Gippsland Wine Trail
- More festivals and events – many being planned now
- Standards continue to improve
- Post fire – alternatives need to be developed
- Group accommodation from Melbourne will increase

SUPPLY CHAINS – GAPS

- Public transport – small bus / fast rail
- Marketing – profile must keep integrity
- Restaurants open
- Facilities/activities
- Cultural activities – some there but not open
- Communication with customers
- Critical mass (industry) to get quality operators
- Training courses and facilities
- Lack of skilled staff
- Networking and communication
- Business directory in some areas
- Group booking service
- Leadership – to move forward

RELATIONSHIPS

- Local bodies – feed into regional body
- Intra business – talk regularly/very strong
- Local community
- Gippsland Wine – 3 sub-regions
- Informal networks/links – 2 way relationships

OPPORTUNITIES

- Group tourism (family groups)
- Touchscreens
- The Prom – raise the profile
- Convention Market – Convention Centre (Helps employment markets for industry)
- Networking with other operators
- Packaging
- Builders hardware – 7 days per week
- Restaurants/take away – take it to the next level
- Promotion of Gippsland food/products
- Mentor program for young people (from industry) – guest speakers

- Staff retention strategies
- Touring routes
- Young people – pathways to stay in industry (work with government)
- Regrowth at Prom

IMPEDIMENTS
- Crown land restrictions – facilities
- Prom Country signage
- Shops closed on weekends
- Signage – needs to be cleaned up
- Attitude by some business owners – don't recognise tourism industry
- Difficult to get people to do training – wait long time for training
- Level of awareness of industry (locally)

Lakes Entrance Workshop

Thursday 23rd June 2005

East Gippsland Shire Council Offices, Lakes Entrance

STRENGTHS OF SUB REGION
- Waterways
- Owner operator commitment
- Parks and adventure tourism - Diversity
- Touring routes - Sydney/Melbourne / GAR
- Strong overnight market
- Combination of thoroughfare and destination
- Weather (domestic and state)
- Co-operative structures (e.g. EGSC Tourism Board)
- History/ heritage of outlying areas (e.g. Point Hicks)
- Government nature based tourism group
- Icons – Snowy River / Gippsland Lakes

TRENDS – HISTORICAL
- Re-structuring internally
- Holiday periods shorter (Dec-Jan)
- Short breaks are increasing
- More people coming though area
- Majority of visitors are from Melbourne
- Increasing number of visitors from within Gippsland
- Growth in the 'sophisticated' tourist market
- GAR increasing number of visitors through Omeo
- Outlying areas – increase in people interested in history/heritage
- More 4 wheel drive activity
- Bus groups declined over may years but are starting to increase
- Cheap flights hit area in winter months (but occupancy still good)
- Increase in web marketing/inquiry – been a major change in approach to marketing
- Expectations of visitors increasing

TRENDS – FUTURE
- Promote the food and wine of the area
- Growth in investment by industry/developers
- Conference and group market will increase (e.g. small conferences)
- A brand for East Gippsland
- Greater co-operation amongst industry
- Greater involvement by EGSC
- An increase in V.I.C. information availability

- More festivals and events (people with passion / ground up planning)
- Nature based tourism/icon walks
- ‘real’ experiences (e.g. Wilderness Bike Ride)
- Increase in commercial tour operators
- Standards will be raised
- Increasing tourism focus in parks
- Greater rail trail activity
- An upgrade to the Barrie Way
- Increase in boating

SUPPLY CHAINS – GAPS
- Communication between industry – “Who’s who in the industry”
- Database of producers – food/wine
- Marketing
- All weather facilities – indoor/kids activities
- Tour operators
- Boating (Charter/tour) operators
- Customer service
- Food distribution
- Infrastructure finance – non traditional

RELATIONSHIPS
- Parks/DSE/EGSC
- Similar accommodation standards network (e.g. Moorings)
- Informal networks

OPPORTUNITIES
- Local produce shop(s)
- Network ‘introduction agency’ – by car/phone
- Rural Learning School, Marlo – parents visiting kids
- Education of what’s happening in area
- Skilled staffing/customer service
- Internal expo – knowledge across region – break down parochialism
- Wider promotion activity
- Accreditation/benchmarking
- Recognition of excellence
- Point of distribution for events and activities – operators need to know
- Communication strategy
- Koala walking tours
- Horse event

IMPEDIMENTS
- Volunteer burnout
- Lack of facilities for kids
- Lack of a large conference facility

Cann River Workshop

Thursday 23rd June 2005

Cann River Hotel, Cann River

STRENGTHS OF SUB REGION

- Lakes system/Pristine environment
- Quality service/good relations
- Complimentary businesses
- Natural beauty
- Recreational fishing – best fishing grounds – internationally recognised (Mallacoota)
- Midpoint between Melbourne and Sydney and 3 hours to Canberra/junction of highways
- Airport at Mallacoota
- Biggest foreshore caravan park in Victoria
- Availability of different types of tourism
- Natural tracks/secluded beaches
- History – Captain Cook's first sighting of Australia
- Seal colony/penguins
- MLC brings income to Mallacoota

TRENDS – HISTORICAL

- Mallacoota becoming a year round destination
- People staying home instead of overseas (Bali/9/11)
- People timepoor – not going to Queensland
- Increase in baby boomer market
- More people coming from Canberra – as a result of marketing by Mallacoota
- Previous Merrimbula visitors coming to Mallacoota
- Restructure of government services has resulted in people shifting out of area – impacts on staff availability (e.g. spouses) for cafés, etc
- Increase in referral business
- Internet has helped break down tyranny of distance barrier (Mallacoota Court – 50% of business via the internet)

TRENDS – FUTURE

- Increase in baby boomer/grey nomad markets
- Boat ramp will increase visitor numbers and overnights
- Nature-based tourism will increase – coastal walks are developing
- More B&B's in area
- Continued population increase (Mallacoota)

SUPPLY CHAINS – GAPS

- Restaurant in Mallacoota
- Staff –trained/reliable

- Public transport from highway
- Tourist information centre (Cann River)
- Parks communication with operators

RELATIONSHIPS
- Mallacoota/Merrimbula/Eden
- New East Gippsland Peak BTA body
- Parks/DSE Tourism industry – relationship 'patchy'

OPPORTUNITIES
- Greater networking (e.g. petrol provision roster in Cann River)
- Boat ramp (Mallacoota) will give some stability – could increase business in town by 10-15%
- Boardwalk in Mallacoota would get people staying longer – more business (plans already prepared)
- Intersection roundabout in Cann River – would slow traffic and make town safer
- Cruise ships are coming into Eden (5 next year) – opportunity for day trips
- YHA in Mallacoota
- Charter operators – fishing and cruising

IMPEDIMENTS
- Seasonality
- Attitude by some business owners/close in off season
- Availability of petrol between Melbourne and Mallacoota – people get stranded
- Beauracracy – need to go through 5 government departments to get things done – often don't agree amongst themselves
- Food availability/variety
- Need 'outside' support to make things happen
- Attitude of Parks – lots of areas locked up over winter months – short of funds
- Infrastructure in parks deteriorating and not being replaced

Sale Workshop

Friday 24th June 2005

Wellington Shire Council Offices, Sale

STRENGTHS OF SUB REGION

- Environment – natural features
- Biggest inland water system starts at Sale
- 60 miles of 90 mile beach
- Snowfields
- Wetlands – Ramsar accreditation
- Glenmaggie Weir
- Wildlife/bird watching – established critical mass/attracts lots of tourists
- Central point between east and south
- Equine – showjumping
- Mountains to beach combination
- 2 nationally recognised highways
- Parks – Tarra Bulga, High Country, World Heritage
- Proximity to Melbourne (2hrs)
- Arts – entertainment and visual
- Noted artists (e.g. Annameike Mein)
- Heritage – Port Albert, Dargo
- Visitor attractions (e.g. military museum)
- 2nd oldest race track in Victoria
- Unique Sale Showgrounds (Show value $24 million to area) and accommodation for traveling motorhomes
- Port of Sale
- Local produce (e.g. world renowned Maffra Cheese)
- Sporting facilities (e.g. motorcycle/hillclimb)
- Access to water
- Flat area – good for walking/cycling

TRENDS – HISTORICAL

- Shorter breaks – people traveling shorter distances
- Higher expectations
- Increase in 'indulgence' spend
- Sophisticated tourist – want someone to do the work for them
- A need to value add product/experience
- Increase in the grey nomads – decreasing in age with plenty to spend
- Increase in cabin/covered accommodation
- Decrease in camping
- More people living in old caravans in coastal parks
- People wanting 'café' lifestyle – looking for atmosphere
- Quality of product/infrastructure is increasing

- The internet has changed the attitude to marketing – people are by-passing travel agents

TRENDS – FUTURE
- Port of Sale – expansion/shops/cafes
- Growth in the number of race meetings – numbers participating for Spring Racing Carnival
- Racing industry looking to package for the big spenders
- Pakenham bypass – will shorten distance to Melb (down to 1.5 hours)
- Will be increase in the grey nomads
- Will be an increase in experiential tourism
- Motorhomes will increase in number and therefore visitations
- Relocation of people into area will bring tourists (e.g. Heyfield)
- Trails – food/arts/industry
- Rail trail will be finalised – start at Maffra
- Further Council support

SUPPLY CHAINS – GAPS
- Accommodation – only 1 5 star – need full range
- Very little investment in accommodation since the mid 80's
- Capital
- Decent conference centre – conference market has high expectations
- Appropriate training for staff
- Network to look at the bigger picture
- Tourism product (e.g. kayaking/canoes) – need operators
- Customer service training (e.g. Aussie Host)

RELATIONSHIPS
- Wellington Shire (i.e. Frank) and industry
- Racing industry/tourism

OPPORTUNITIES
- Confidential critique of businesses – look at everything and give feedback (D.Tulloch)
- Annual awards/incentive program
- Improve caravan parks
- Email notices to businesses with events and groups coming to region
- Industry website
- Use for (soon to be vacated) West Sale TAFE facilities – grey army/budget/self care travelers
- Farm tours – especially for overseas tourists
- Raise awareness of Art Gallery
- Promotion of Arts and facilities
- Opportunities for industry to get involved – timber/RAAF/Murray Goulburn
- Regional showcase – food and wine
- Airport

- Education – package with local operators (e.g. robotic dairy)
- Relationship with motorhomes association (20,000 on the road at any time – Chapter in Gippsland.
- Gippsland Wetlands Centre

IMPEDIMENTS
- Government attitude to development
- Sewerage/infrastructure – Loch Sport/Golden Beach
- Professionalism of industry – staff training/operators
- Networking and communication between industry
- Businesses closed on holidays
- Co-ordination of tourism in Sale
- Short term planning – no recognition of big picture
- Ability for people to fly into Sale (big issue for Turf Club)
- Parochialism
- Marketing planning – need a blueprint

Yarram Workshop

Friday 24th June 2005

Wellington Shire Council Service Centre, Yarram

STRENGTHS OF SUB REGION

- Environment – Natural diversity
- ‘under development’
- township of Yarram
- Australian wildlife
- Compact – 30-40 minutes can be in different environments
- Good variety of activities
- Operators unique
- Rainforest/orchids
- Fishing diversity/schnapper festival
- History unique – Chinese fish curing/cemeteries/rail lines
- Maritime museum
- Fishing destination (Port Albert)
- Range of accommodation – all styles
- Infrastructure is good
- Proximity to west and east
- Highway (Yarram)
- Birdlife
- Walks/wetlands
- Boating/National parks
- Golf course/beaches

TRENDS – HISTORICAL

- New people moving into the industry – more professional
- Demand for better service
- Expectations are higher
- Want the same as other places – particularly Melb.
- Internet – people research
- People cold call via email
- Greater costs for listing electronically
- Greater influx at traveling time (Port Albert)

TRENDS – FUTURE

- Greater critical mass (more people living in area) – enable business development
- Greater emphasis on the environment – will become very important
- Industry will change as younger people see tourism as a key industry
- People with different experiences will continue to move into area
- Profile of tourists will be socially aware/40-50’s with money/groups
- Will be increase in nature and special interest (e.g. birds) groups/individuals
- Gourmet tourism

- Retirees looking for accommodation (Trailer homes)
- Fishermen with families (who have money)

SUPPLY CHAINS – GAPS
- Secretarial services for operators
- Restaurants – local food and wine (good e.g. Koonwarra Store)
- Communication/network – need to build up relationships
- Staff (skilled)
- Information Centre (Yarram)
- Telecommunications – Tarra Valley/Port Albert
- Course standards (tourism)

RELATIONSHIPS
- Informal networks
- Wellington Shire (i.e. Frank) and industry
- Port Albert/Tarra Valley/Yarram

OPPORTUNITIES
- Awards/incentives
- Create tourism organisation
- More networking
- Make Yarram/Port Albert a loop round trip Sth. Gipps. Hwy/Princes Hwy
- Winter destination focus
- Regional brochure – Yarram/Port Albert/Tarra Valley
- Signage strategy
- Packaging product
- Inter regional expos – could be undertaken in conjunction with farmers markets

IMPEDIMENTS
- Grand Ridge Road – bad experience for travelers/dangerous road
- Opening hours of tourism related businesses (e.g. wineries)
- Lack of good food in area (dining experience)
- Critical mass (for festivals)
- Signage
- Empty shop fronts – bad image for visitors, need window displays

Warragul Workshop

Monday 27th June 2005

Former Shire Hall, Warragul

STRENGTHS OF SUB REGION

- Proximity to Melbourne (particularly with petrol prices)
- Undeveloped product – can go next level
- Snow & sea
- Proximity to Gippsland Lakes
- Environment – diversity
- Climate – is underrated
- 4 seasons – brings different people looking for different experiences – enables a wide range of activities
- good value/affordability
- Diversity of talents – quality producers/artists
- Products created in the region (e.g. artists)
- Under commercialised – rural/quality/value
- Transport links
- Changing profile – new people coming into industry
- Standards changing/increasing (but true to country and genuine)
- Go out of way to help/approachable (e.g. Gippsland wine – real people)
- Food (e.g. cheeses)
- Galleries/studios

TRENDS – HISTORICAL

- Growth in wineries and B&Bs
- Quality of accommodation has increased
- Restaurants are using local products/produce
- Recreational forest use
- Markets are increasing (e.g. farmers) – tourists/locals/other Gippslanders are attending
- Use of internet – especially for accommodation – becoming a primary marketing tool
- Café/coffee trend
- The increase in population has meant a decrease in rural land – loss of landscapes
- Travelers more astute/require higher standards/require flexibility/make spur of the moment decisions to visit
- Extended hours of opening
- Short breaks
- Impromptu activity – assisted by technology
- Increase in the number of day trippers
- Coach day tours for older people

TRENDS – FUTURE
- Greater touring activity – will create critical mass
- There will be an increase in the profile/awareness of the region
- Greater discernment by travelers
- Increase in packaging
- More professional industry
- Reduction in the number of people in the industry
- Climate changes will benefit the area
- Short breaks will continue to increase
- Technology use will increase – the immediacy of activity will impact on what has to be produced
- More cellar door activity for wineries (and food producers)
- Values will drive choice
- There will be more ‘things to do’ – interactive/experience/diversity
- Greater use of value adding
- Increase in the number of events
- Will be a need to cater for the local population
- Will be a greater investment in infrastructure
- Greater recognition of industry and support from local government

SUPPLY CHAINS – GAPS
- Information – signage (interpretive), brochures
- Awareness of area – branding/identity
- Local awareness – dispel assumptions about product (also at operator level)
- Ambassador program – information kits for industry
- Networking and communication
- ‘relief network’ for small business
- infrastructure capital investment – information centre, Grand Ridge Road, South Face Road
- Public Transport (excluding trains)
- Tour operators
- Packages

RELATIONSHIPS
- Shire/tourism
- Galleries and studios/tourism
- Pockets of tourism relate well
- Wine – across Gippsland
- Co-operative marketing – Cardinia/Wellington/Latrobe
- Creative Gippsland
- Tourism Victoria/Gippsland Gourmet
- Food and Wine Festival – Yarragon

OPPORTUNITIES
- Tour operators
- Food and wine (packages on line)

- Packages – can expand products
- Customer service/loyalty building
- Marketable brand
- Tourist information centre – educate people
- Identify benefits through increased visitation
- Events - Lardner Park
- Golf
- Convention Centre (500 bed facility) – with a point of difference
- Accommodation – to cater for bus load of people
- Leverage off consumer awareness of products (e.g. cheese)
- Cultural Centre (Nobby)
- Food experience
- Educate local people about the industry
- Inter regional expo – educate businesses at the same time as professional development – have workshops at the expo (Tourism Alliance)

IMPEDIMENTS
- Limited funds (public and private)
- Infrastructure – roads/accessibility/accommodation
- Public transport
- Inherent conservatism – e.g. planning controls
- Lack of recognition of region (e.g. wine regions – definition issues)
- ‘chip on the shoulder’
- Resistance to local products/tourism
- Recognition of industry as a career
- Technology – broadband
- Size/burnout of operators
- Apathy in some areas
- Business skill - some operators
- Wine – problem across Gippsland – geography/history

Traralgon Workshop

Wednesday 20th July 2005

Latrobe City Council Offices

STRENGTHS OF SUB REGION

- Diversity – Activities/Industries
- Proximity from Melbourne
- Natural Assets – snow/beaches
- Events – 600 events registered – 100 significant events (highest in Gippsland)
- Number of beds in accommodation
- Variety of accommodation – budget to 5 star
- Friendly community/environment – 'people proud to live here'
- Industrial tourism – can also be a weakness
- Green rural landscape – including drive from Melbourne
- Roads/infrastructure
- Sporting venues/leisure centre
- Race courses
- Diversity of knowledge and skills
- Multi cultural area – greatest in Gippsland
- Strong arts and culture community – cultural tourism operators
- Arts festivals
- Innovative businesses and people
- Supportive local government
- Hospital system and services
- Monash University – international students – parents visit

TRENDS – HISTORICAL

- Arts – cultural tourism has grown
- Heritage – becoming more important
- Environment – people are more aware
- Looking for somewhere new – 'done Great Ocean Road'
- Image has changed – people more interested in area – greater local pride
- Level of innovation is increasing
- Creative Gippsland established
- Events increasing – attracting national and international – longer stays/bigger events/tailored to region and run by region
- Improvements in facilities – Traralgon stadium/arts gallery/upgrade to oval to AFL standard
- Appreciation of local events by local people is increasing
- Events being used as a model for other areas
- Local people doing more – retirees planning to do more
- Higher spend on tourism
- Short breaks – people looking for value for money
- Increase in domestic visitors (due to external factors such as 9/11)

- Support structure for tourism – more co-operation/organisation
- Technology - net has had a big impact – last minute bookings/looking for bargains

TRENDS – FUTURE
- Higher professionalism / new people coming into industry
- Arts/cultural tourism will increase
- Businesses setting goals/measures and are outcome orientated – will increase
- Greater focus on Gippsland by Tourism Vic
- More partnerships/packaging
- Stronger regional partnerships
- Fast rail – opportunities for operators (commercial)
- Increase in people wanting things organised for them – time poor
- More corporate activity in region – conferences/accommodation
- Events industry will become stronger – event people trust the area
- Greater networking in the arts/culture industry
- Greater recognition of the arts and culture nationally/internationally
- South Face Road – will complete the loop
- Recognition of area through awards (e.g. Rose Garden)
- Racing – family friendly themes will attract larger audiences – will get corporate sector out of Melb

SUPPLY CHAINS – GAPS
- Lack of onselling to other areas of Gippsland – cross marketing
- Effective marketing
- 'Icon' recognition
- Distribution of marketing materials - $ for marketing
- Communication/networking locally
- Local tourism association (locally)
- Staff – skills/customer service
- Owner operator training/awareness
- Gippsland events calendar

RELATIONSHIPS
- Shire/tourism
- Galleries and studios/tourism
- Pockets of tourism relate well
- Co-operative marketing – Baw Baw/Wellington
- Creative Gippsland

OPPORTUNITIES
- Branding the area
- Upselling – promoting others/stay longer
- Interregional expo
- Cross marketing
- Website platform – for discussion between operators

- Dedicated site for promotion – key in requirements and get options
- Heritage trail – linked across Gippsland
- Strengthening partnerships (e.g. business arts sponsor for Heritage Park)
- More information requests in accommodation for onselling – electronic
- Communication with tourism industry by Shire
- New Tourism Advisory Board
- Local Tourism Association
- Events billboard at entry to Latrobe
- Baw Baw/Wellington/Latrobe relationship to develop – up a level
- Signage audit

IMPEDIMENTS
- Parochialism
- Outside image (perception)
- Self image (perception)
- Local leadership – tourism industry
- Lack of communication
- Introspection (Latrobe Valley)
- Local culture – insular
- Public transport (excluding rail)
- Fragmented pockets of industry – culture/sport/tourism
- Lack of awareness with traders

Leongatha Workshop Report

Thursday, 18th August 2005

South Gippsland Shire Council Offices, Leongatha

STRENGTHS OF SUB REGION
- Green grass
- Proximity to Melbourne – gets people to area
- Scenery – variety
- Artisan community
- Serenity
- Rail Trail – Leongatha to Foster
- Clean green image
- Cottage industries – food/wine/produce
- On the tourist route – lot of internationals in the area
- Friendly people in the area
- Number of seachangers / treechangers moving into area
- Natural attractions
- Cost efficient destination (e.g. petrol)
- Good highways

TRENDS – HISTORICAL
- Focus on quality of lifestyle – area fits requirements (e.g. Inverloch/Meeniyan)
- People can't buy into more traditional areas – e.g. Mornington Peninsular/Anglesea
- People looking for lifestyle
- Time poor professionals
- Lot of retired people coming though area – with money
- Grey nomads through caravan park (low yield)
- Visitors looking for quality food/galleries
- People coming into nurseries more often
- Increase in short breaks – want to do more in shorter period
- Increase in nature tourism
- Looking for quality/professional service – with a country feel
- Visitors looking for local produce/homemade products
- Technology has had a big impact – especially the internet
- Increase in demand for self contained accommodation

TRENDS – FUTURE
- Increase in population (locally) – people will bring friends / increase in word of mouth promotion
- Will lead to better infrastructure
- Grey nomads market will continue to increase
- External factors such as petrol prices and terrorism will have positive impact on the area – e.g. more visitors

- Greater use of packaging for products and services
- New people moving into the industry

SUPPLY CHAINS – GAPS
- Leadership –fragmented industry
- Vision for tourism industry
- Accommodation in Leongatha – large groups / conferences / buses
- Training for staff – time and cost
- Signage for industry
- Packages for tourism product and services
- Niche business training – e.g. computer operations (such as web page design) and marketing

RELATIONSHIPS
- Tourism group/traders – could be better
- Tourism industry/SGSC – could be better

OPPORTUNITIES
- There is a need for businesses to undertake a review of marketing strategies – electronic vs. hardcopy
- Greater use of collaborative activities across the towns – link between SGSC and business
- Package product – accommodation/food/activities
- Intra Gippsland tourism promotion – attracting people from over the mountain
- Cater better for day trippers and weekenders
- Need to be able to experience the taste of Gippsland
- Existing organisations need to 'beef up' the networking activities
- Raise the image of the area and towns – e.g. Korumburra Railway Station

IMPEDIMENTS
- Poor business practices – e.g. opening hours
- Lack of collaboration between businesses – e.g. packaging
- Red Tape – government departments (at all levels)
- Shops shut at times when tourists are around
- Conflict (perceived) between the towns
- Ability to attract good staff – problem compounded because of location
- Pool of labour that is available
- Lack of networking with other businesses

Phillip Island Workshop

Name	Business
Julie Curran	Cowes Caravan Park (Pres. PITA)
Ian Baker	Glen Isla House
Mark Manteit	CEO Phillip Island Nature Park
Kim Storey	PITA Membership/Admin
Eric van Grondelle	Holmwood Guesthouse
Richard Huntriss	Coorie Doon
Debbie Callander	The Continental Hotel (Marketing Exec)
Peter Francis	Tourist Info Centre Manager
Ken Hore	Bass Coast Shire Council
TELEPHONE INTERVIEW	
Geoff Mark	Amaroo
Geoff Moed	Amaze N Things

Inverloch Workshop

Name	Business
Lori Worthy	Visitor Services Co-ordinator – Wonthaggi/ Inverloch
Deborah Scott	(DGI Rep) Inverloch Cattery
Lewis Stone	Real Estate - Pres. Inverloch Tourism
Blair Hodges	South Coast Real Estate
Ken Hore	Bass Coast Shire Council
TELEPHONE INTERVIEW	
Jo Beazley	Holistic Health Network
Dom Brusamarello	Rightway

Foster Workshop

Name	Business
Leanne Mc Gannon	Waratah Bay Caravan Park
Brian & Meg Thornborrow	Buln Buln Cabins
Noreen Wills	Ripplebrook by the Prom President Prom Coast Tourism
Ian Wills	Ripplebrook by the Prom President Prom Country Tourism
Mary Bond	Hiking Plus
John Davies	Backpackers/Butchers
Sally Cullen	Cullen Retreat (Sec Mirboo Nth DATA)
Liz Morris	Old Colonial Bank (Pres Mirboo Nth DATA)
Owen Schmidt	Lyer Bird Hill Winery
Carole Saunders	Jacaranda House (Sec Sth. Gipps. B&B Assoc)
David, Matt & Ben Wallis	Camp Rumbug
Lorraine Hughes	Meeniyan Motel
Paul Ahern	Aherns Fruit Market
Liz Rushen	Waratah Hills Winery
Graeme Wilson	Windy Ridge Winery
Claire Buckland	South Gippsland Shire Council

Lakes Entrance Workshop

Name	Business
Adrian Bromage	The Moorings, Metung
Paul	Bellevue Quality Inn
Elizabeth Woffenbuttal	Southern Cross Holiday Apartments
Peta Sneath	Buchan BTA
Chris & Esther Banson	The Esplanade Waterfront Resort
Brian Blakeman	Community Officer (former)
Chriss Millo	Gippsland Lakes Escapes (Paynesville BTA)
Gail Wright	Parks Victoria
Michael Kelly	Lakes Entrance Bowling Club
Brett Lynn	East Gippsland Shire
TELEPHONE INTERVIEWS	
Kaye Munro	Waterholes Guesthouse
Gerard Goris	De Ja Vu

Cann River

Name	Business
Allison Rainey	New Proprietor (Café)
Steve Waixel	Mallacoota Explorer Tours
Raphael Mills	Cann River Hotel
Danny Bluett	Café @ 54
Brett Lynn	East Gippsland Shire Council

Sale Workshop

Name	Business
Jan Kewley	Former Accommodation Operator
Carole Rossetti	Sale Art Gallery
Merle Sheean	Wellington Arts and Craft
Alan Lewis	Pres-DGI
Ron Henke	Tinamba Tavern B&B
Darren Randle	Streetlife Coordinator
Ian Rees	Sale Turf Club
Ann Andrew	Frog Gully
Wendy Rhodes	Heyfield Wetlands Centre
David Tulloch	Gippsland News
Carolyn Crossley	Cowwarr Art Space
John Lockett	Gippsland Armed Forces Museum
Bob Livingstone	Wellington Tourism Board
Bill Jackson	Robotic Dairy
Frank Norden	Wellington Shire Council
TELEPHONE INTERVIEW	
John Manly	Loch Sport Supermarket

Yarram Workshop

Name	Business
Lisa Grassby	Tarra Valley Rainforest Retreat
Anthea Albert	Eileen Donan Gardens
Ralph	Best Friend Holiday Park
Robyn Bull	Tarra Bulga Guesthouse
May Scammell	Mirridong
Bill Black	Port Albert Maritime Museum
Margaret Pellew	Tarra Valley Caravan Park
Helen Jones	Port Albert B&B
Tina Hambleton	Alberton Project
Michael Glebov	Port Albert Wildflowers
Roman Manser	Tarra Valley Rainforest Retreat
Frank Norden	Wellington Shire Council

Warragul Workshop

Name	Business
Ross McDermott	GippsTAFE Yarragon and District Tourism Assoc (YDTA)
Alene Bonser	Yarragon Country Retreat
Margaret Oliver	Pink Fly Studio
Gary Surman	Parnasus B&B
Nobby Ward	Mira Mira B&B
Michael Henson	Creative Gippsland
Joanne Butterworth-Grey	Drouin West Fruit and Berry Farm
Albert Fox	Darnum Musical Museum
Cathy John	Lillico Glass Studios
Angela Batteras	Bloomfield Cottages
Maree Wallace	What's on in Baw Baw
Karen Whittaker-Taylor	Baw Baw Shire Council

Traralgon Workshop

Name	Business
Rod McLeod	Brigadoon B&B
Michael Fozzard	Gippsland Heritage Park
Janiene Ayre	Events Co-ordinator Latrobe City
Daryl Couling	Gippsland Racing
Brendan Blackshaw	Gippsland Racing
Nicola	Gippsland Racing
Lynette Raven	Creative Gippsland
Melinda Wilson	Montfort Manor
Hazel Young	GRIS – Monash Uni
Graham Maddocks	Coal Valley Motor Inn
Peter Kershaw	Parks Victoria
Michele Fielding	Rawson Village
Linda Brock	Latrobe City Council

Leongatha Workshop

Name	Business
Cheryl Lamb	Lamont House
Kay Puru	Leongatha Caravan Park
Paul Van Roy	Restaurant
Ed Szwaja	Coal Creek Heritage Village
Amanda Ford	Cypress Hill B&B
Dorothy Serfozo	Djinta Djinta Winery
Keith Grey	Earth Releaf Nursery & cafe