



Glen Rock Ecotourism Assessment Report



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An analysis of the Eco-tourism potential of Glenrock.

Introduction

Ecotourism is often used interchangeably with other terms such as nature-based tourism, sustainable tourism, green tourism, responsible tourism and soft tourism (1). In this report, “eco-tourism is nature-based tourism that involves education and interpretation of the natural environment and is managed to be ecologically sustainable” (2).

The rural history and use of Glen Rock has potential for rural tourism (ie a country experience) as described in the National Tourism Strategy. Rural activities on Glen Rock could include rural attractions, rural adventure tours, farm-stay and horse riding. There are indigenous and non-indigenous cultural values at Glen Rock which could contribute to the tourist experience. These activities could be considered cultural or heritage tourism.

For the purposes of the assessment of the tourism attributes of Glen Rock, eco-tourism includes rural and cultural tourism and some aspects of commercial outdoor and nature-based recreation.

Ecotourism opportunities in Glen Rock are linked to tourism in the Gatton Shire, the World Heritage Areas of the Central Eastern Rainforest Reserves (CERRA), the natural features of the property, the cultural heritage attributes of the property, the potential for outdoor recreation and the associated rural tourism of the Lockyer Valley. (see Map 1 for locality, and Map 2 & 3 for topography and features of interest)

Background

Tourism in the Gatton Shire

Tourism in the Gatton Shire was analysed in 1996 “Analysis of the Tourism Industry in the Gatton Shire” prepared for Gatton Shire Council by B Prideaux, N Cule and H Master (UG School of Business Studies). This report documents a SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats Analysis) of tourism in Gatton Shire. Findings of the SWOT analysis, relevant to eco-tourism on Glen Rock, include:

1. Strengths:

- close proximity to the two major cities of Brisbane and Toowoomba;
- rural landscape;
- war memorials and Aboriginal drawings;
- lifestyle of locals;
- natural resources;
- rural as opposed to coastal tourism;

- Lockyer Landcare Tours;
- strengths in the areas of cultural, environmental and heritage.

2. Weaknesses:

- lack of promotion within and outside the Shire;
- coordination of, and the identification of, tourist businesses and events is nearly non-existent;
- nothing on the highway to draw tourists along the scenic route;
- lack of awareness of local people of tourist attractions available in the shire.

The report (p12) also identifies Gatton as a tourist zone between the destinations of Brisbane and Toowoomba. (Unless tourists are persuaded to travel through and stop in the Shire on their way to other destinations, Gatton Shire will lose a large share of its potential tourism market.) The report concluded that preparation of a Shire Tourism Strategy is a priority.

Lockyer Watershed Management Association (LWMA) has sponsored the successful Lockyer Valley Rural Tours. The management of Glen Rock has worked with the LWMA to develop tourism products. This partnership has further potential as Glen Rock's tourism opportunities are realised. A key component of the LWMA's rural tourism is the exposure given to the activities and production of the Lockyer Valley. Glen Rock's location, at the head of the Lockyer Valley, has potential to attract tourists into the Lockyer Valley.

There are other businesses in the Lockyer Valley and adjacent to Glen Rock that will interact with any marketing or development of Glen Rock as a tourist destination. Black Duck 4WD Park, Gordon Country and Tenthill Hotel are obvious enterprises in the tourist "catchment" of Glen Rock. The front gate sale of farm produce has potential for a broader range of people to interact with visitors. There are reports of increased visitation to Glen Rock already leading to more direct purchases of farm products. Positioning of Glen Rock will be aimed at complementing the existing enterprises of the Valley and attracting new visitors rather than redirecting existing visitors. Glen Rock can provide a diversity for existing tourists and so entice people to stay longer.

World Heritage Area

The proximity of Glen Rock to Mt Mistake National Park is an opportunity to attract a different clientele to the area. The National Park is part of the World Heritage listed Central Eastern Rainforest Reserves (Australia) (CERRA). The CERRA area extends along the Scenic Rim from Tweed Heads and Coolangatta to the public lands adjacent to Glen Rock.

The CERRA provide a significant asset upon which nature-based tourism can be based and marketed. Currently, the area is not well known either nationally or internationally and is not well managed due to financial constraints.

While Mt Mistake National Park may not be the most marketable part of the CERRA, the area has inherent attributes which provides a signature. Glen Rock does provide an opportunity to access or view the rugged ranges of the CERRA from outside the listed lands. The potential

for people to see and experience the World Heritage Area from Glen Rock would help protect the core area from the impacts of visitors.

Presentation of World Heritage values is one of the primary goals of World Heritage Management. The following principles apply:

- maintaining World Heritage values;
- protecting use by local residents;
- encouraging locally-based tourism and employment;
- presenting a range of recreation opportunities.

Glen Rock is well positioned to complement and promote the World Heritage Area. However, public and tourist interest of the World Heritage Area in the proximity of Glen Rock is undeveloped. The most attractive parts of the CERRA are those areas of rain forests further east (Lamington and Springbrook). It is not likely Glen Rock will ever be a “front” door to the CERRA, but it should be possible to exploit ‘back door’ opportunities. The distinctive nature of the CERRA in the proximity of Glen Rock is an opportunity yet to be fully explored.

Natural Features/Attractions

The most obvious feature of Glen Rock is the rugged landscape. The mountainous country is of interest while the geology and vegetation add interesting components. The geological history is of interest to many people – being related to the volcanic action that created Mt Warning.

Flora and fauna of this property represents an interesting diversity of species. Being adjacent to the World Heritage Area, it is likely some of the species that are significant in the World Heritage listed area are present on Glen Rock. Species of particular interest include koala (*Phascolarctos cinereus*), Glossy Black Cockatoo (*Calyptorhynchus lathami*), Brush-tailed Rock-wallaby (*Petrogale penicillata*) and Grey Goshawk (*Accipiter novaehollandiae*). The variety of birds found in the Lockyer Valley is among the highest in the world. There is little doubt Glen Rock shares a similar diversity.

Cultural Heritage

Glen Rock is reported to have been the largest grazing property in South East Queensland when purchased by the Government in 1996. The property has been continually grazed for longer than 130 years. The history of European settlement is being recovered from official records. The evolution of Glen Rock is an interesting story and one able to be interpreted for visitors. There are a few cultural relics on the property which will be of interest to visitors. The recent “collection” of cattle brands from across the region has created an unexpected interest. Already 80 brands have been recorded and a further 60-80 are known likely additions. These will be on permanent display. The story of the indigenous people around Glen Rock is not complete to this time. With the only known Aboriginal rock carvings a few kilometres north west there is no evidence of Aboriginal use or settlement on Glen Rock

property. The rock, known as Glen Rock, appears to have significance to traditional owners. Indigenous representatives have asked that access to Glen Rock be limited out of respect for Aboriginal occupation and legends.

Visitor Expectations

Successful eco-tourism depends as much on reputation and “word-of-mouth” as it does on the physical attributes or promotional activities. Tourism is a holistic industry and can be linked with many activities, conditions and experiences.

The expectations tourists could reasonably have of Glen Rock (and the Lockyer Valley) are:

- certainty with respect of directions (effective, clear, sufficient);
- diversity of environmental and tourist activities;
- quality and friendly service in the delivery of accommodation, information and sales;
- sustained interest – could be in one activity or a combination of recreational, heritage, environmental, cultural, landscape or ecological features;
- safety (or clearly defined hazards);
- interpretative information available;
- effective crowd/people management;
- provision for exploration and soft adventure as desired;
- an understanding of rules and requirements in the local area;
- litter and pollution free environment;
- hands-on experience;
- appropriate setting for each activity;
- credible and authentic experiences.

Current Nature Based Recreation and Ecotourism activities

Outdoor Recreation

There is potential for a wide range of outdoor recreation activities on Glen Rock. The range of possible uses is a feature of this property, although the permitted uses will need to have regard to the sustainability and compatibility of uses. From initial investigations, likely activities include:

- 4 wheel driving;
- bushwalking;
- horse riding;
- camping (vehicle-based, remote, wilderness);
- picnicking;
- outdoor education/study;
- fossicking;
- exploring;
- mountain bike riding;
- trail bike riding;
- nature study;
- bird watching;
- swimming (limited).

The range of activities is only one aspect of recreation. The setting for various activities is arguably as important as the activity. Glen Rock planning is based on the Recreation Opportunity Spectrum. There are a range of settings within Glen Rock including some new wilderness settings that are becoming rare in South East Queensland. The likely visitor interaction with the adjacent National Park provides a secure opportunity to experience one of the few wilderness experiences of this region.

Rural Tourism

The property has a number of rural tourism opportunities, but collaboration with Lockyer Valley Rural Tours of the LWMA provides a broader range of rural attractions. The horticulture of the Lockyer is a working landscape. Cropping activities are continually changing the appearance of the Valley. The trip from Gatton to Glen Rock is seen as integral to the tourists' enjoyment of Glen Rock itself. The activity of the Lockyer is "genuine" and a tourism capacity already exists. Glen Rock needs to complement existing work and build on LWMA achievements.

Cattle activities on the property are of interest to many people. Existing agistment arrangement does not envisage that the cattle will play a role in the tourist activity on Glen Rock. The existing agistee has suggested the current agreement could be modified (when next renewed) to include options for a “tourist” component. Integration of cattle grazing with public use of the property is a challenge for the future management of Glen Rock.

Horse riding on Glen Rock could combine recreation and rural activities. While there are some practical constraints (notably the need to control the introduction of weed seeds and cattle ticks) there is considerable potential for Glen Rock to develop an “equine” theme.

Backpackers

The backpacker market is an emerging market with significant potential. It already contributes in excess of \$1.5 million per annum to the Australian economy, with an average growth (1992-8) of 13%. There has been some speculation of the opportunities for Glen Rock to capture some of the backpacker market. This opportunity needs to be tested against current practice and the potential for a change in the backpacker market.

International backpackers to Australia in 1998 represented:

- 8.7% of all international visitors (336 300)
- 24.4% of all international visitor nights (24 554 000); and
- 18.4% of all international visitor expenditure (\$1.539 million).

Domestic backpackers are estimated to account for 377 000 visitors and 1 987 000 visitor nights.

Sydney to Brisbane is a significant travel route for backpackers. Despite the congregation of backpackers in Brisbane, their prime motive for being in Brisbane seems to be as an opportunity for travellers to do their administration, shop and perhaps work. Brisbane is not seen as a base for day tours or activities. There is an opportunity to engage backpackers in the hinterland of Brisbane. This would not be possible for Glen Rock alone, but as part of an evolving package there is potential to capture some of this market.

Backpackers are wanting to engage in as many activities as possible, to live within the culture and to see as much of the country as possible. They minimise expenditure on non-discretionary items (basic food, accommodation and transport) and ensure maximum value from their discretionary items (tours, activities, dining out and souvenirs). It seems that savings on non-discretionary items are used for discretionary items. Therefore, cheap accommodation is a likely prerequisite if Glen Rock is to attract a backpacker clientele.

Backpackers’ desired activities include the range of outdoor recreation activities envisaged on Glen Rock as well as the rural and cultural activities of the Lockyer valley and Gatton. It is, however, contingent on creating an awareness of the attraction of the Lockyer Valley and Glen Rock. At present the Lockyer Valley is not on the route of backpackers in Australia and Queensland. It is virtually unknown and so attracts very few visitors. One option, suggested by QTTC, is to create a signature attraction to complement the natural and rural attributes of the area and the property.

Study Methodology

The Ecotourism Resource Assessment Team (ERAT) members were :

- Mr Kim Payne - Regional Destination Development Advisor, Tourism Qld
- Mr Andrew Foley - Principal Development Officer (Outdoor Recreation), Sport and Recreation Queensland
- Mr Brett Waring –Principal Policy Officer, (Public Forests), Department of Natural Resources
- Mr Peter Lawson – Planning Co-ordinator, QPWS
- Mr Carl Glen – Senior Planning Officer, Consultation, Department of Natural Resources

Mr Payne was able in his professional capacity to liaise with local tourism professionals in generating background for the study and validating opportunities.

Phase 1 Ideas generation

Ecotourism ideas were brainstormed and allowed unfiltered to be brought to the table from whatever source. Sources included the Glen Rock management committee, Rat team members, Gatton student studies, discussions with locals, tourism reports.

Phase 2 Activity rationalisation

Ideas were then sifted by the ERAT team to a set of reasonable ideas (consistent with the property vision and within the bounds of fiscal and practical feasibility) and further fleshed out.

Phase 3 Preferred development level definition

Three levels of possible development were defined ranging from extremely cautious to somewhat ambitious. All three levels were seen as reasonable depending on interpretations of property objectives and the market assumptions made.

Phase 4 Scenario analysis

Scenarios were analysed for their appropriateness to Glen Rocks Strategic direction, particularly the need to maximize public benefit while lying lightly on the land and minimizing dependence on public funding. The chosen scenario was then further assessed for feasibility and proposed to be tested in the landscape for compatibility with other values and uses for Glen Rock.

Phase 5 Activity location

Activities identified in the chosen test scenario were located in the property, and Planning Units were assigned a value reflective of their contribution to the success of the Ecotourism Scenario.

Phase 6 Activity location field validation

Activities assigned to Planning Units based on general principles and ERAT team knowledge were then field validated to ensure opportunities were realistically located.

Eco-tourism Market Analysis for Glen Rock

In 1998, students of Gatton College compiled a report: “Ecotourism Options for Glen Rock” (Class of Tourism Demand and Product Development) and “Cost-Benefit analysis of Alternative Land Use Proposals for Glen Rock” (Class of Resource Economics).

These reports were considered by the Glen Rock Management Advisory Committee and used as both a source of options and to stimulate ideas for the future use of Glen Rock. Market segments used by the students were adopted for the purposes of assessing the tourist potential of the property.

Ecotourism Market Segments

The Segments are:

- **Adventurers** – generally young (18-39 years old), mobile people looking to extend themselves. This group look to extend themselves either physically and/or mentally. Activities might include: bush craft, survival courses or a physical challenge (eg flying fox, canyoning, bicycle riding or rock climbing or new experiences (eg rural and farming tasks). Tend to be both domestic and overseas tourists. A signature activity eg flying fox/chairlift and a diversity of activities is important to this group.
- **Rural Retreat** – generally urbanities looking to “get away from it all”. This group includes families, young couples or small groups looking to experience natural settings and/or rural activities. Accommodation (cabins, lodges or some styles of camping) in independent units or seem to be stand-alone. Included in this group are those looking for a farm stay experience. Farm stay is for those more intent in participating in rural or environmental activities (eg tree planting, mustering, trail rides, hay rides etc).
- **Backpackers (including working holiday)** – a method of travelling favoured by young Europeans, Americans and Australians. A preference for budget accommodation and a flexible travel schedule. A preference to meet locals in a working holiday (bar work, fruit picking etc). They have longer holidays for which informal and participating activities are favoured. Unspoilt scenery, friendly people, natural wonders and wide-open spaces feature in their needs. Brisbane has not had great success in capturing the backpacker market (outside of shopping). The top activities, according to the Australian Tourism Commission, are swimming/surfing (67%), scuba diving/snorkelling (51%), bushwalking/trekking (48%), rock climbing (23%). Other important activities are horse riding and safari tours. This is a major and growing (13%) segment of the tourist market. Glen Rock has the potential for either stand-alone or integrated (with competitors) destinations.
- **Health/Executive/Indulge Retreat** – including the “indulger” market. Generally well-paid executives or middle management. Indulgers account for 20% of the tourist market. They are positive, individualistic, inner-directed and enjoy interesting experiences and a diversity of activities. Generally middle-aged, no children. Holiday, weekend and training are aspects included in this segment. Good access to Brisbane is desirable.

- **School groups, university and church youth groups.** Motivation is for group activity (related to education, social or cultural needs). This group takes in younger people, generally with a low budget. Diversity of self-contained activities (walking, swimming, abseiling) or environmental management/rural activities (can consider “in kind” contributions eg tree planting, weed eradication, inventory etc).
- **Travelers** – largely self-contained (campervan/caravan or tent) tourists usually either older and more cautious retirees or middle-aged European tourists. A diversity of experiences is desirable with genuine, natural “cultural” or rural experiences favoured. Guided tours and/or good interpretation needed. Generally able to stay longer, but cheaper accommodation favoured.
- **General Recreation Day Visitors** – local and regional tourists looking for a day out with something different. Could be couples, families or extended families, but includes bus groups, eg Lockyer Land care tourism. May indulge in one or two activities on each visit. Very good source for word-of-mouth recommendations. Some day visitors may be attracted to recreational groups, eg pick up/drop off long distance walkers or horse riders. Tend to be self-sufficient but can be enticed to take part in a range of activities (even more adventurous types). Primary motivation good access, quality facilities, travel time (probably 2 hours maximum).
- **Special Eventers** – participants and “followers” in one-off events, eg down hill cycle challenge, rogaine, orienteering, gymkhana, rural festival etc. Tend to be self-sufficient in equipment, eg bikes or horses. This group can be used to attract other segments especially Day Visitors. Accommodation needs of special eventers are cheap to modest and they have preference for group accommodation (bonfire/camp oven/ barbeque etc).
- **Recreation Stay** – those tourists looking to undertake a hobby or favoured recreation activity., for example naturalists, bird watchers, hikers, bushwalkers. Prefer cheap or free access to recreation needs and favour cheap accommodation. Motivation to go to Glen Rock would include special values (eg rare bird), wilderness experience, World Heritage access recreation activities (eg horse riding), and environmental works. Likely to use other facilities incidentally – a range desirable to encourage visits.

The option report developed a range of tourism products for each market segment. In assessing the opportunities, the ERAT adopted a preference for a range and diversity of activities and products that might appeal to more than one segment. This approach was based on the experience with outdoor recreationists who may be motivated by a primary activity but are likely to try different activities. Similarly, the approach used to assess tourist options at Glen Rock is to use the primary motivation of each segment while hoping to broaden the experience of individuals across other segments. In the context of Glen Rock, the adventurer enthusiast might be willing to ride a horse or enjoy viewing the landscape or bird life as part of the “day’s experience”.

Ecotourism Opportunities at Glen Rock

The following development strategies for Glen Rock were felt by the Ecotourism Resource Assessment Team (ERAT) to cover the range of reasonable options based on strategic directions articulated by the Glenrock Management Advisory Committee and the Regional Landscape Unit.

- Level 1
Maintain current recreation facilities for locals and organised groups with cattle grazing and ongoing inventory work
- Level 2
Option 1 plus existing infrastructure to provide low key options for visitors with gradual development of visitor facilities. (No attempt to meet major gaps (swimming hole, signature activity, built accommodation))
- Level 3
Develop infrastructure (eco-village) including wide range of accommodation styles (lodge, hostel cabins, onsite camp) and activities to meet needs or expectations of a range of ecotourist market segments. Assets built by State or Private sector and, in general, operated by private sector.

It was felt by the ERAT that while level 3 may be more than most people are comfortable with, investigating this option provided opportunity to fall back to lower levels of development should key aspects be found to be unacceptable, while investigating the lower level options would provide little information regarding the sustainability/ compatibility of higher levels of development. As such it was decided to investigate options on the developed side of reasonable to ensure the management committee and the community were as informed as possible regarding the full suit of options available to them.

In pursuing level 3 type development it is unlikely a single tourist market segment will be large enough for Glen Rock to focus on exclusively. A combination of segments utilising the same amenities seems to be the more likely scenario. This approach could be refined if (when?) visitation reaches carrying capacity but having regard to the existing tourist industry in the Lockyer and existing visitation to Glen Rock, a more diverse approach is considered to be more realistic. This approach will require a diversity of amenities which are “attractive” to different segments.

The range of ecotourism opportunities that might be provided at Glen Rock (with a focus on level 3 development options) has been summarised in the table below and the ERAT team has identified those opportunities considered feasible enough to be worth testing for ecological sustainability and use compatibility as part of the Glenrock Planning Process.

Table 1 Reasonable Ecotourism Opportunities for Glen Rock

Proposed Opportunity	Client Group	Supporting Opportunities	Comments	Staging / Priority (1-3)	Opportunity Locations investigated
Accommodation 0.1, Farm Stay using existing infrastructure	Bed and Breakfast, Small Group, Family, Backpackers (fruit pickers ?)	Bush walking, nature observation and relaxation. People seeking a comfortable rural experience with some educational benefit of farm & cattle management, horse riding, 4WD driving.	<ul style="list-style-type: none"> Traditionally a hosted accommodation experience Requires full time management – maintenance and staffing costs Small returns, esp in terms of capital costs of purpose built structures. Usually only a supplemental income source. 	3	No
Accommodation 0.2, Farm Stay remodelled infrastructure	Bed and Breakfast, Small Group, Family, Backpackers (fruit)	Bush walking, nature observation and relaxation. People seeking a comfortable rural experience with some educational benefit of farm & cattle management, horse riding, 4WD driving.	<ul style="list-style-type: none"> Low volume accommodation; “weekender” or other holidays. Ideally tied into a range of (authentic) activities. 		Yes, Old House Site
Accommodation 0.3, Farm Stay new structures	Bed and Breakfast, Small Group, Family, Backpackers (fruit)	Bush walking, nature observation and relaxation. People seeking a comfortable rural experience with some educational benefit of farm & cattle management, horse riding, 4WD driving.	<ul style="list-style-type: none"> Likely to be only a marginal proposition, probably better served by other surrounding property owners. 		Yes, as for health retreat
Huts 0.1. Timber Slab – Basic Shelter Shed partially open with water tank and washing up facility benches for food preparation and sleeping benches. Fire Place/pit and Pit Toilet	Small Group Bush Walkers Individuals and Families willing to accept with very low level of facilities	Overnight base for walkers	<ul style="list-style-type: none"> Self contained accommodation. Pick up on Cook’s Hut Style Flexible – use when needed. Mostly weekender or holiday use. 	1-2	No, but camp sites serving the same purpose were identified
Huts 0.2 Timber Slab Hut with water tank and separate pit toilet. Benches for Cooking and food preparation with fire place. Sleeping benches, pit toilet structure.	Nature Observers		<ul style="list-style-type: none"> Different styles to suit different settings. Reasonably cheap to operate with more costs associated with top end (cleaning, maintenance, linen, etc) 		Yes

Proposed Opportunity	Client Group	Supporting Opportunities	Comments	Staging / Priority (1-3)	Opportunity Locations investigated
Hut 0.3 Exclusive Use. Timber Slab Hut with water tank & supply to small galley kitchen and shower facility. Combustion stove and fuel and spirit lighting provided. Some furniture for sleeping, table and chairs provided. Composting toilet in hut.	People seeking more luxury in a rustic rural setting. Walkers, family and small groups seeking a higher level of comfort and facilities.		etc). <ul style="list-style-type: none"> • Easily accessible, self contained cabin style appropriate in terms of weekend retreats out of Brisbane. 		Yes
Semi Permanent Camp sites (wooden pad canvas walls & roof)			<ul style="list-style-type: none"> • Require ablutions, etc. • Compliment existing camping grounds. • Slightly more refined camping experience. • “Easy” camping options – arrive late Friday night, no dramas setting up tent, etc. • A good way to deliver camping experiences to time strapped Queen Street Cowboys. 	1	Yes, a range of camping sites and styles were identified and semi permanent camps are appropriate in a setting class 6/7 setting
Health Retreat 0.1	Individuals, small and larger groups	People seeking relaxation and rejuvenation in a quiet rural setting. Seeking luxury accommodation with high quality facilities and health treatment options. Passive to low exertion activities.	<ul style="list-style-type: none"> • Compatible with corporate planning and outdoor education programs. • Private or Public sector involvement. • Need to assess market demand. • Good way of addressing slack time during mid week and off season 	2	Yes
Rural Retreat – Leadership Groups	Organised Groups engaged in personal development courses.	Range of activities from highly active to passive. Personal development courses.			Yes, same structure as Health Retreat

Proposed Opportunity	Client Group	Supporting Opportunities	Comments	Staging / Priority (1-3)	Opportunity Locations investigated
Lodge/Country Club Isolated location with highly developed luxury facilities. Site Options: Mt Machar Upper Bench North East Corner North west Boundary Bench	Groups and individuals seeking a secluded rural lodge experience	Passive and active outdoor recreation activities. People seeking relaxation, and personal rejuvenation. Activities including farm activities, environmental education, personal development courses, walking, bike and horse riding and 4WD driving to appreciate the landscape.	<ul style="list-style-type: none"> • Private sector role – detailed market and financial feasibility required 	3	No
Horse Trails/Camps			<ul style="list-style-type: none"> • Competition needs to be assessed. • Equestrian Centre already in the Lockyer Valley – good linkage. • Ride up or rent. • Management issues re trail use by different modes. hiking, 4WD, horses, Mountain Bikes. • Given its size and increasing pressures on other public lands (re horse riding), Glen Rock could be well placed to be a major player in providing horse riding experiences in SEQ 	1	Yes
Pack animal Tours 0.1 – Day	People seeking outdoor recreation experience using animals to carry supplies and camping equipment.	Walking and riding plus camping in the bush using pack animals.	<ul style="list-style-type: none"> • Doesn't require too much on site infrastructure (not counting camping facilities or hut arrangements). 	2	No

Proposed Opportunity	Client Group	Supporting Opportunities	Comments	Staging / Priority (1-3)	Opportunity Locations investigated
Pack animal Tours 0.2 Overnight	People seeking outdoor recreation experience using animals to carry supplies and camping equipment.	Walking and riding plus camping in the bush using pack animals.	<ul style="list-style-type: none"> arrangements). Perhaps some on site pens. Novel experience. Some constraints re ability to operate full time, again, weekend and holiday periods. Could tie in with other programs – corporate development, outdoor education etc Private sector role 		No
Chair Lift 0.1 Mt Philip	Persons using chair lift as transport to starting points for long and short distance walks.	Viewing Scenery Nature observation Astronomy	<ul style="list-style-type: none"> Interesting and novel. Best way to access most elevated trails and best views of valley 	1	Yes
Chair Lift 0.2 Glen Rock	Persons using chair lift as transport to starting points for long and short distance walks.	Viewing Scenery Nature observation Astronomy	<ul style="list-style-type: none"> Could be developed as the entrance and place of orientation for Glen Rock Unsure of costings, though likely to be significant. 		No
Chair Lift 0.3 Mt Machar	Persons using chair lift as transport to starting points for long and short distance walks.	Viewing Scenery Nature observation Astronomy	<ul style="list-style-type: none"> A “signature” attraction that compliments the activities mix and would be easy to promote. 		No
Flying Fox 0.1		Extreme	<ul style="list-style-type: none"> Could tie into corporate building programs, outdoor education. Low/moderate setup and running costs. Could easily be part of activities visitors expect – be good to tie it into waterhole. A value adding activity. 	1	Yes
Abseiling 0.1 Christies Gully	Group lead activity	Abseiling			
Ultra light	Club Members	Joy flight experience	<ul style="list-style-type: none"> Add on activity Requires little infrastructure to facilitate Private sector role 	2	yes
Hang gliding	Hang Gliding Clubs	Glen Rock Gliding			yes

Proposed Opportunity	Client Group	Supporting Opportunities	Comments	Staging / Priority (1-3)	Opportunity Locations investigated
Mountain Bike 0.1	Active Outdoor Recreation Users Up and Down Down hill speed x time	Competitive Riding time x distance x competitor	<ul style="list-style-type: none"> Touring trails not so problematic, down hill runs require more attention and needs to be purpose built (esp. for events) Both options could be popular for same reasons as horse riding Apart from trail work, no significant infrastructure required. Compatible with other park activities and infrastructure. 	1-2	yes
Mountain Biking 0.2	Touring Groups & individuals	Touring – scenic appreciation			yes
Earth Sanctuary 0.1 Glen Rock gully			<ul style="list-style-type: none"> Good add on to Glen Rock interpretation Opportunities to pick up on local and other corporate sponsorship. Reasonably low cost point of interest and activity for visitors to Glen Rock 	2	yes
Education Tour 0.1 Farm/Ag/History			<ul style="list-style-type: none"> Primarily private sector May take some time to develop opportunity (market assessment) Existing operators could be approached to trail venture and help develop tours. Management issues re other compatible uses of Glen Rock. Probably operate out of Brisbane, Gatton, Glen Rock. Footloose - low infrastructure requirements. 	1-2	yes
Education Tour 0.2 One stop in wider tour					yes
Hunting Tours 0.1 Rifle					No
Hunting Tours 0.2 Bows					No
Tours 0.1 Guided 4WD Bus					Yes
Food and Beverage 0.1 Kiosk standard service			<ul style="list-style-type: none"> Some distance to F&B services outside of Glen Rock Important to all visitors, especially overnights, though 	1	Yes
Food and Beverage 0.2 Tea House					Yes
Food and Beverage 0.3 Bush Kitchen					Yes

Proposed Opportunity	Client Group	Supporting Opportunities	Comments	Staging / Priority (1-3)	Opportunity Locations investigated
Food and Beverage 0.4 Restaurant			<ul style="list-style-type: none"> overnighters, though mid week slumps could be problematic. Probably need to test the market first, start with Kiosk Alternatively, given size of Glen Rock, lease/contract catering vans On site food and beverages are important to visitor experience 		Yes
Events and Festivals			<ul style="list-style-type: none"> Signature event – eg, Eco Fest, to help raise awareness of Glen Rock and accomplish environmental education objectives. Venue for various festivals/events – Hang Gliding, Horse riding, mountain biking, ultralights, etc. Compatible with all infrastructure Requires a local champion/coordinator 	1-2	Horse, Bike and 4wd only
Permanent waterhole(s)			<ul style="list-style-type: none"> Important for all activities and settings Will greatly enhance experience at Glen Rock 	1	Yes

Ecotourism Strategy

The development of Glen Rock as an eco-tourism destination at level 3 will require a business strategy that induces demand and is prepared to weather negative cash flow for five years.

The option of gradual development of facilities in line with modest demand is not considered feasible. A level of amenity needs to be provided (at some time) to induce demand. A signature activity is considered desirable to help create the critical mass for tourism to make a significant contribution to the income of the property.

The option of a marketing strategy develop demand is not recommended – there is no lasting advantage and competitors are well established.

To assist in understanding the ecotourism opportunities at Glen Rock, a SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis was undertaken. This utilised the previous investigations and the experience of those associated with Glen Rock and like destinations. The results of the SWOT Analysis are:

Table 2 Ecotourism SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Broad range of environmental settings and values • Can accommodate a range of development options • Large, diverse property • Built heritage, cultural and landscape values • Currently one management body (State) • Adjacent to World Heritage Area • LWMA Rural tourism already established. • Developing bird watching theme in the Lockyer. • cooperation among existing tourism operators and potential for cooperation. • Lockyer Valley has existing rural tourism opportunities. • Rural traditions are strong and evident. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Limited permanent waterholes (swimming) • Distance from urban centers and support services and facilities • Plenty of recreational reserves in SEQ • Undeveloped site – unproven: no track record to form basis for future development • Lockyer Valley/Gatton – poorly developed as a recreational or tourism destination (product & awareness) • Seasonality – weekends, holidays. Location not conducive to significant mid week activity. • Too close to Brisbane to be considered a destination.
<p>Opportunities</p> <ul style="list-style-type: none"> • Backpackers & seasonal workers in Lockyer Valley • Some positioning of Lockyer Valley as a destination – promotions, events and tourist drives/routes. • Links with backpacker accommodation houses and tour operators trying to keep travellers in the region longer – need itineraries. • Growth in nature based and short break holiday market. • Some contraction in region in terms of natural settings for certain recreation/tourism activities (mid-long term) • Growing regional population – residential and visitors • Several operators already in region in accommodation horse riding, skydiving, 4WD tours, etc (some critical mass). 	<p>Threats</p> <ul style="list-style-type: none"> • Short term oversupply of recreational settings (region) • Fire control & management • Strong competition in SEQ, esp coast and coastal hinterlands, lakes/dams. • Lack of marketing and promotion. • Travellers from Brisbane to Toowoomba dislike interruptions.

Outcome from the SWOT Analysis

Issues:

- Some constraints re compatibility of some proposed activities with settings, eg Lama Pack Tours (aesthetic issues).
- Some constraints re compatibility of some proposed activities with other proposed activities, eg horse trails with 4WD with trekkers seeking “wilderness” experience (management implications).
- Rugged environment has impact on safety and liability issues (visitor management).
- Infrastructure is only part of the answer – marketing and promotion is required to raise awareness and interest.
- Local seasonal work appears to be mostly contracted out to regular workers – not a large backpacker workforce, though large latent backpacker market in region, esp. Brisbane.

Some general comments:

- Because of its attributes, Glen Rock should be able to easily develop as a significant recreation facility in SEQ.
- Its progressive development as a recreational facility should be accompanied with visitor/consumer research and monitoring programs to assist manage facility and develop private sector interest. Mosaic (postcode) analysis can give good market intelligence re demographics and origins.
- As market awareness of Glen Rock increases more interest can be directed towards true tourism areas, eg accommodation, tours etc.
- A marketing and promotion program, inclusion of various media, road signage and events/launches would greatly enhance consumer and investor awareness and interest in Glen Rock.
- An industry panel of operators and relevant businesses from the Lockyer Valley and Brisbane could further refine the planning, and also establish an important dialogue between potential commercial users of Glen Rock.
- A program of familiarisation for potential consumer groups and operators are cost effective ways of assessing the tourism value of Glen rock.
- A more detailed tourism concept and feasibility assessment of Glen Rock will be required when the mix of land uses is clarified by the management plan.

Level 3 Scenario Analysis

A revenue stream from ecotourism is important for the long-term management of Glen Rock. To cater for a range of users and provide diverse, activities will require additional staff to that currently employed. Visitor management will need to be largely self funding, and if possible make a contribution to the overall management of the property. In developing the eco-tourist options, there is an assumption that after a development phase (say 5-10 years) the property should be financially independent (for recurrent costs).

Current visitation to Glen Rock is estimated at about 2 500 visitor days. A reasonable and feasible estimate of 15000 visitors resulting in 20 000 visitor days and 10,000 visitor nights has been used to project a revenue stream. This scenario involves all identified segments and the accommodation needs attributable to each segment. In addition, there will be the income from individual activities, entry fees and food/beverage purchases. The projected income from all ecotourism activities is shown in Table (2). Details of these projections are in Attachment 1.

Table 2 : Ecotourism Level 3 Scenario Summary

	Scenario Statistics											
Market Segment	Visitors	Visitor days / pa	Market Segment % of Total Visitation	Day Visitation % per annum	% Overnight visitation	Entry fee (Day Users Only)	\$/person/day spent on accommodation	Mean number of Activities/day	\$/person spent on activities	\$/person/day spent on food/beverage	\$ / Market Segment	% Revenue Contribution
Adventure	1200	1600	8	4	4	\$1.50	\$20.00	1.85	\$42.00	\$9.00	\$83,200.00	8.5
Rural Retreat	700	1400	7	0	7	\$1.50	\$41.59	1.55	\$21.00	\$15.00	\$93,927.27	9.6
Backpacker (including working holiday)	1900	3600	18	1	17	\$1.50	\$21.00	1.55	\$24.81	\$18.50	\$185,430.56	18.9
Health/Exec/Indulger Retreat	500	800	4	1	3	\$1.50	\$91.18	1.67	\$20.94	\$37.50	\$95,474.63	9.7
Schools/Uni Groups	400	600	3	1	2	\$1.50	\$12.50	0.69	\$4.80	\$1.50	\$8,120.00	0.8
Travellers	1000	1600	8	2	6	\$1.50	\$28.52	1.50	\$18.13	\$15.00	\$76,947.22	7.8
General Recreation Day Visitors	8000	8000	40	40		\$1.50	\$0.00	1.45	\$31.50	\$9.50	\$340,000.00	34.7
Special Eventers	400	600	3	1	2	\$1.50	\$20.37	1.00	\$6.67	\$7.00	\$15,314.81	1.6
Recreation Stay	900	1800	9	0	9	\$1.50	\$24.81	1.50	\$16.25	\$13.00	\$82,691.67	8.4
Total	15000	20000	100	50	50	\$15,000.00	\$197,921.25		\$519,780.00	\$260,500.00	\$993,201.25	100.0

Table 2 reflects that :

- A range of tourism segments are expected to contribute to the overall character and success of Glen Rock.
- General Recreation Day Visitors are expected to be the most important consumers at Glenrock
- Indulgers are expected to be the highest per capita consumers of Glen Rock services
- Adventurers are expected to participate in most activities per capita.
- That participation in commercial tours/ activities is expected to be the greatest income earner and generally reflects the intention to get people out into the property doing things and enjoying themselves.
- That gross revenue of almost \$1m is possible from level 3 scenario activities

Based on this revenue analysis the following level 3 scenario budget estimate was prepared:

Table 3 Glen Rock Level 3 Scenario Budget Estimate

Scenario Description	Develop infrastructure (eco-village) including wide range of accommodation styles (lodge, hostel cabins, onsite camp) and activities to meet needs or expectations of a range of ecotourist market segments. Assets built by State or Private sector and operated by private sector.		
Capital Investment	<ul style="list-style-type: none"> • Chairlift • Accommodation • Activity sites • Activity equipment 	DNR \$500,000	PRIVATE \$1000000 \$350,000 \$300 000 \$200 000
Asset Maintenance	<ul style="list-style-type: none"> • Capital Items and items in 2 above • Depreciation 	\$115 000	\$150,000 \$70 000
Management strategies/ Operating Costs	<ul style="list-style-type: none"> • On-site presence • Regulation and Interpretation Commercial Activity Fees Operating Costs	\$60,000 \$30,000	\$0 \$30,000 \$150,000 \$250,000
	TOTAL RECURRENT COST	\$205,000	\$650,000
Revenue	<ul style="list-style-type: none"> • Entry fees • Accommodation • Activities • Sales/Consumption • Commercial activity fees 	\$15,000 \$100,000 \$0 \$0 \$150,000	\$0 \$98,000 \$520,000 \$260,000
	OPERATING SURPLUS	\$60,000 on current account in a full year Break even in 10 years	\$228,000 on current account Break even in 5-10 years

Locating Level 3 Scenario Activities in Glenrock

77 Planning Units were defined in Glenrock by the Management Committee (see Map 3). For Ecotourism purposes, values were assigned to planning units based on the importance of the service or activity to the overall viability (including both interest generating and revenue generating aspects of viability) of the strategy, the proximity of appropriate infrastructure (roads, power, water etc) and the quality/ ambience /marketability of the site. For example

Table 4 Example of ecotourism value calculations

Puid Number.	Market interest	Infrastructure	Site Quality (from Recreation Site Quality Assessment where appropriate)	Site Activity Contribution to scenario cash flow	Overall Ecotourism Value	Activities proposed
	(MI)	(Inf)	(SQ)	(SAC)	(OEV)	
3	9	8	7	6	7	bikes; horses; Campervans / Camp
13	6	10	7	9	7	lodge; farm stay activities, barracks

$$\text{Where OEV} = ((\text{Inf} + \text{SQ}) / 2 * ((\text{MAX}(\text{MI}, \text{SAC})) / ((\text{MAX}(\text{MI}, \text{SAC})) + 0.1))^20) * 1.221$$

In general the Overall Ecotourism Value is the mean of the Infrastructure and the Site Quality (ambience) of the planning unit, reduced by an amount reflective of whether there is likely to be any demand for the activities proposed for this site. All sites were field inspected to ensure the accuracy and viability of assessments made. The Overall Ecotourism Values are mapped in Map 4 attached and were provided to the Management Group for inclusion in their further decisions relating to the management of Glen Rock.

Attachment 1

Table 5 Accommodation Analysis

					Estimated Person Nights Accommodation								
Market Segment	Visitor days / per annum	% of total visitation	Day Visitation %	Overnight %		Camp	Camp / campervan	Campervan / Caravan	Bush Cabin	Cabins	Hostel	Lodge	Total Segment Person Nights Accommodation
					Likely Setting	2-5	6-7	6-7	2-5	6-7	6-7	6-7	
Adventure	1600	8	4	4	6-7	97	242	48	121	48	242	0	800
Rural Retreat	1400	7	0	7	6-7	64	127	191	255	636	64	64	1400
Backpacker (including working holiday)	3600	18	1	17	2-7	680	680	113	567	227	1133	0	3400
Health/Exec/Indulger Retreat	800	4	1	3	6-7	0	0	0	35	212	0	353	600
Schools/Uni Groups	600	3	1	2	6-7	60	140	0	0	0	200	0	400
Travellers	1600	8	2	6	6-7	44	311	444	44	178	89	89	1200
General Recreation Day Visitors	8000	40	40		6-7	0	0	0	0	0	0	0	0
Special Eventers	600	3	1	2	6-7	30	148	104	15	30	59	15	400
Recreation Stay	1800	9	0	9	2-7	267	667	133	333	200	133	67	1800
Profile/Marketing	0												
Total	20000	100	50	50		1241	2316	1034	1370	1531	1921	587	10000

Table 6 Accommodation Scenario Analysis

	Accommodation Style							Total
	camp	Camp / campervan	Campervan / Caravan	Bush Cabin	Cabins	Hostel	Lodge	
Plausible Visitor Accommodation Scenario	20 sites *2.5Adults *10% occ	25 sites *3adults *15%occ	5 sites* 3adults* 20%occ	4cabins* 2.5adults* 10% occ	3cabins* 3adults* 20%occ	1 hostel * 25beds* 20%occ	1lodge* 3rooms* 2 adults *30% occ	
Visitor Nights Accommodated	1825	4106	1095	365	548	1752	548	10238
Construction Cost	\$50,000	\$150,000	\$100,000	\$120,000	\$100,000	\$80,000	\$250,000	\$850,000
Revenue / night	5	5	20	50	50	20	120	
Revenue / Accomm. Style/ annum	\$9,125	\$20,531	\$21,900	\$18,250	\$27,375	\$35,040	\$65,700	\$197,921

Table 7 Participation Analysis

					Tourism Activities								
Market Segment	Visitor days / pa % visitation day Visitation % pa O/N %				Rural activities	Walk/Nature study/Cultural Tour	Craft (Art, wood turning, sculpture etc) Tour	Bicycle Tour	Horse Tour	4WD Tour	Trail Bikes/ORV's Tour	Ultra lights	Hang gliding
Adventure	1600	8	4	4	60	60	0	240	240	60	120	120	60
Rural Retreat	1400	7	0	7	210	70	70	0	70	70	0	0	0
Backpacker (including working holiday)	3600	18	1	17	95	95	95	190	190	190	95	95	95
Health/Exec/Indulger Retreat	800	4	1	3	25	50	50	0	0	50	0	0	0
Schools/Uni Groups	600	3	1	2	20	20	0	0	0	0	0	0	0
Travellers	1600	8	2	6	100	0	0	0	100	100	0	0	0
Recreation Day Visitors	8000	40	40		400	400	400	800	1,200	800	0	0	0
Special Eventers	600	3	1	2	0	0	0	0	0	0	0	0	0
Recreation Stay	1800	9	0	9	45	45	45	45	90	90	90	0	0
Profile/Marketing					0	0	0	0	0	0	0	0	0
Total visitors/ participants	20000	100	50	50	955	740	660	1,275	1,890	1,360	305	215	155
Assumed fee/session/person					\$50.00	\$50.00	\$50.00	\$30.00	\$50.00	\$50.00	\$50.00	\$50.00	\$100.00
Est. Total Revenue					\$47,750.00	\$37,000.00	\$33,000.00	\$38,250.00	\$94,500.00	\$68,000.00	\$15,250.00	\$10,750.00	\$15,500.00
Plausible Scenarios					10 persons per day on wkends	7 persons per day on wkends	6 persons per day on wkends	12 persons per day on wkends	18 persons per day on wkends	13 persons per day on wkends	3 persons per day on wkends	2 persons per day on wkends	1 persons per day on wkends
Scenario Participation					1043	730	626	1251	1877	1356	313	209	104

Table 7 continued ...

					Tourism Activities							Signature Events				
Market Segment	Visitor days / pa		% visitation	day visitation %	O/N %	Parachuting	Abseil	Swimming	Fishing	Chairlift	Flying fox	Ropes course	Competitive Horse	Bicycle Championships	Total Segment interest (no. of activity participations)	
	Adventure	1600	8	4	4	60	60	600	0	300	240	0	0	0		2,220
	Rural Retreat	1400	7	0	7	0	0	350	0	245	0	0	0	0		1,085
	Backpacker (including working holiday)	3600	18	1	17	95	95	950	0	475	190	0	0	0		2,945
	Health/Exec/Indulger Retreat	800	4	1	3	0	25	250	0	350	25	10	0	0		835
	Schools/Uni Groups	600	3	1	2	0	0	200	0	20	8	8	0	0		276
	Travellers	1600	8	2	6	0	0	500	0	700	0	0	0	0		1,500
	Recreation Day Visitors	8000	40	40		0	0	4,000	0	3,200	400	0	0	0		11,600
	Special Eventers	600	3	1	2	0	0	200	0	200	0	0	0	0		400
	Recreation Stay	1800	9	0	9	0	45	450	0	315	90	0	0	0		1,350
	Profile/Marketing					0	0	0	0	0	0	0	0	0		0
Total visitors/ participants	20000	100	50	50	155	225	7,500	0	5,805	953	18	0	0	22,211		
Assumed fee/session/person					\$200.00	\$10.00			\$20.00	\$10.00	\$50.00	\$25.00	\$25.00			
Est. Total Revenue					\$31,000.00	\$2,250.00	\$0.00	\$0.00	\$116,100.00	\$9,530.00	\$900.00	\$0.00	\$0.00	\$519,780.00		
Plausible Scenarios					1 persons per day on wkends	3 persons per day on wkends	100 persons per day on wkends		60 persons per day on wkends	10 persons per day on wkends	5 persons per quarter	200 persons once a year + 50 per quarter	200 persons once a year + 50 per quarter	15,000 people averaging 2 activities per visit		
Scenario Participation					104	313	10429		6257	1043	40	400	400	30000		

Table 8 Consumption Analysis

	Food Customers			Other Customers		Total	
Market Segment	Liquor	Snack	Restaurant	General Store	Trinkets/Sauvenier	Total	Estimated Average expenditure /person /day/Market segment
Adventure	240	400	80	80	80	880	\$9.00
Rural Retreat	280	70	210	210	210	980	\$15.00
Backpacker (including working holiday)	1440	1440	180	900	540	4500	\$18.50
Health/Exec/Indulger Retreat	280	80	400	40	320	1120	\$37.50
Schools/Uni Groups	0	30	0	30	30	90	\$1.50
Travellers	240	240	240	240	240	1200	\$15.00
General Recreation Day Visitors	400	3200	400	800	800	5600	\$9.50
Special Eventers	30	120	30	60	30	270	\$7.00
Recreation Stay	270	180	270	180	90	990	\$13.00
Profile/Marketing	0	0	0	0	0	0	\$0.00
Total	3180	5760	1810	2540	2340	15630	
Expected expenditure /person /day/product	\$20.00	\$10.00	\$50.00	\$10.00	\$10.00		
Total Revenue	\$63,600	\$57,600	\$90,500	\$25,400	\$23,400	\$260,500	

Ecotourism Images of Glen Rock

Photo 1 : Planning Unit 3 possible camping site



Photo 2 : Planning Unit 4 View from below Mt Philp



Photo 3 : Planning Unit 9 Possible site for swimming hole



Photo 4 Planning Unit 13 Lodge / Cabin Site



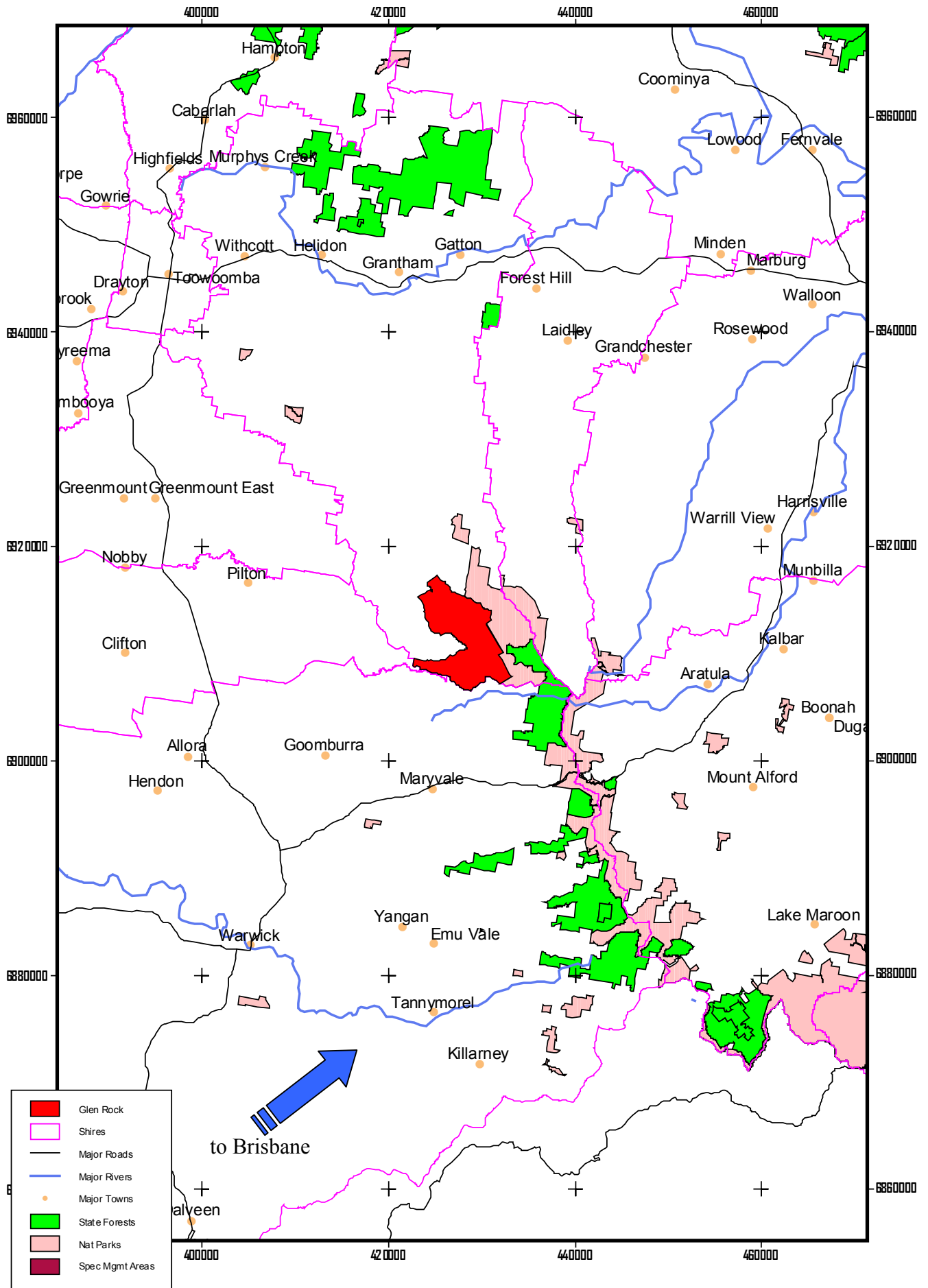
Photo 5 : Planning Unit 15 Glenrock Gully adjacent to possible camp



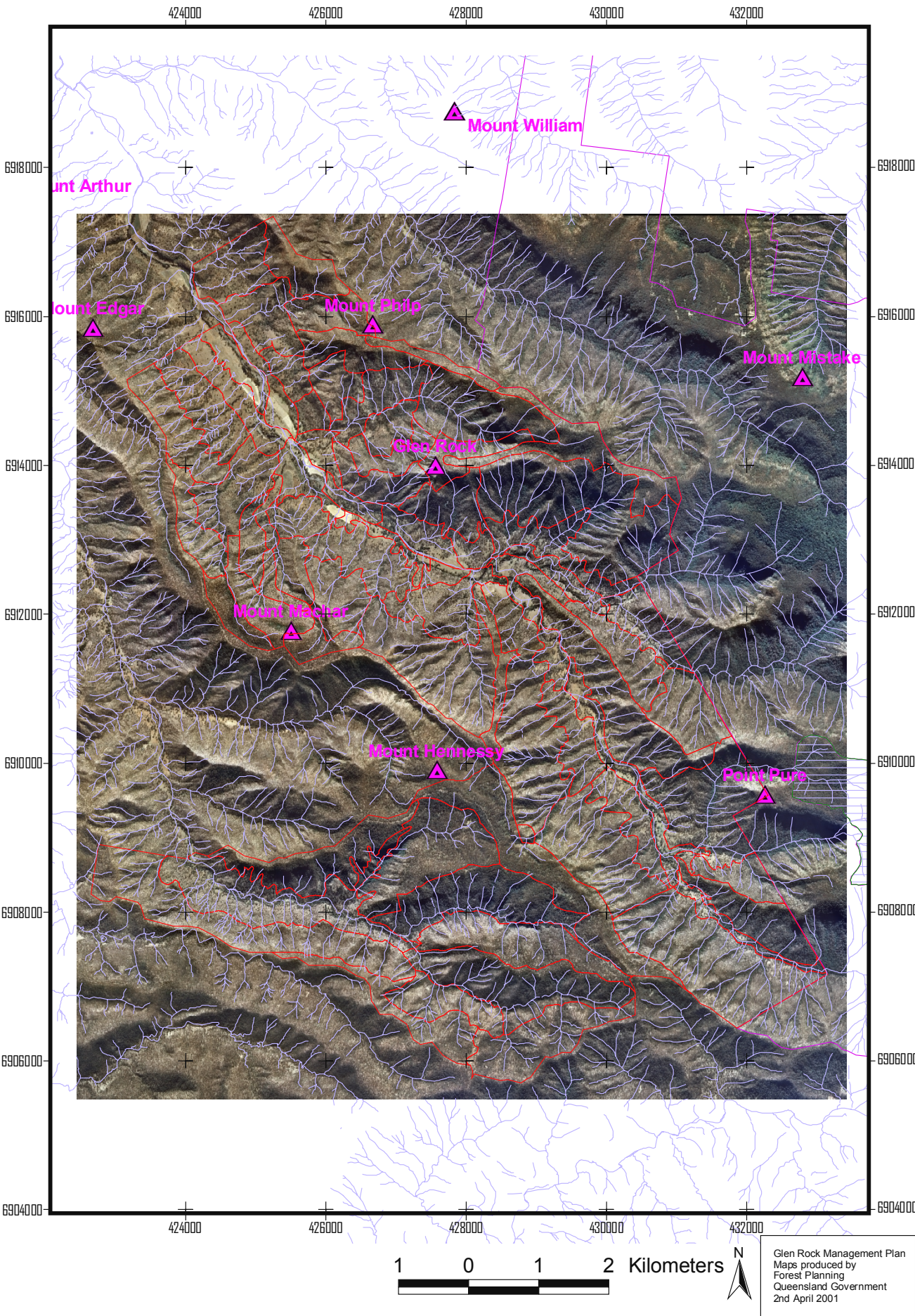
Photo 6 : Planning unit 42 possible Bush Cabin site



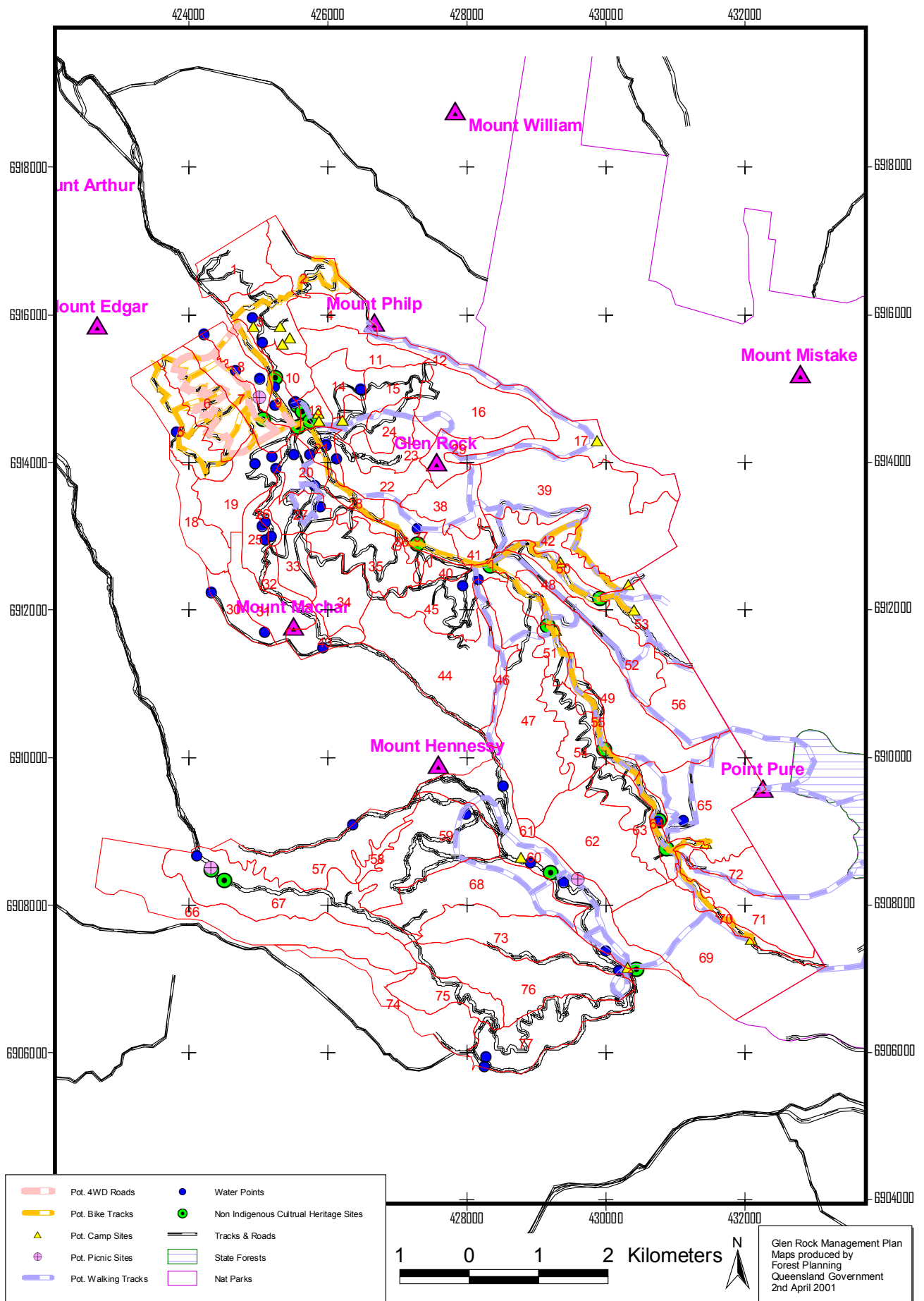
Map 1 Glen Rock Location



Map 2 Glen Rock Landscape



Map 3 Planning Units & Points of Interest



Map 4 Ecotourism Values

