



VICTORIA'S HIGH COUNTRY

THREE YEAR STRATEGY
2025-2028

Over the next three years, Tourism North East aims to redefine how tourism can influence positive change and drive future-fit environmental, social and economic outcomes.

But we can't do it alone.

Together, we have the opportunity to maintain and grow a dynamic tourism industry for generations to come.

This is the plan.



We acknowledge the traditional custodians of the lands and waters that are Victoria's High Country and pay our respects to their Elders past, present and future.

We honour their stories, songs, art and culture, and their aspirations for the future of their people and these lands.

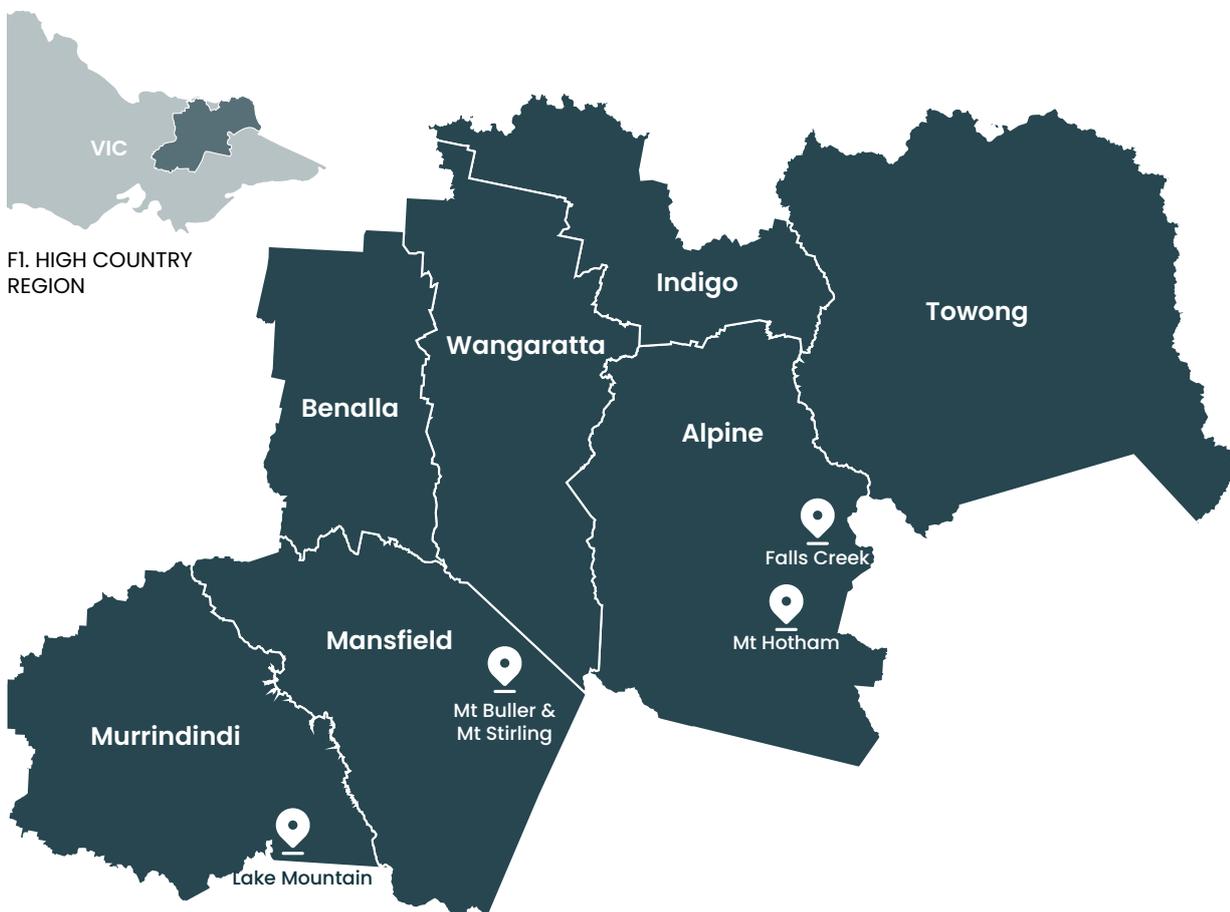
1. VICTORIA'S HIGH COUNTRY

Located in the north-east of the state, Victoria's High Country forms a significant part of Australia's Great Dividing Range. From Kinglake to Corryong, from Mansfield to Rutherglen, this region is unlike any other in Victoria.

It boasts mountainous, alpine and lowland terrain, picturesque villages, rich farmland, world-class wineries and thriving rural towns. Renowned for its physical beauty as well as a rich diversity of visitor experiences, the High Country is home to beautiful landscapes, big blue skies, clear starry nights and clean, fresh air.

It is a high reward destination with flourishing produce, exceptional 'new world' wines including local heroes Prosecco and Muscat, a thriving arts and culture scene, epic snowfields and is known as Australia's Premier Cycling Destination.

In the year ending Sept 2024, the High Country attracted 4.7 million visitors who stayed 7.4 million nights and generated \$1.8 billion in direct visitor spend.¹



Tourism North East is the Visitor Economy Partnership for Victoria's High Country. The organisation focuses on uniting its diverse stakeholder base in a common development path to optimise visitor economy outcomes.

2. TOURISM NORTH EAST

Tourism North East (TNE) is the Visitor Economy Partnership for Victoria's High Country, which encompasses the Shires of Alpine, Benalla, Indigo, Mansfield, Murrindindi, Towong and the Rural City of Wangaratta, and the four major alpine resorts of Falls Creek, Mt Hotham, Mt Buller/ Mt Stirling.

Charged with developing the strategic tourism direction for the High Country, Tourism North East focuses on uniting its diverse stakeholder base in a common development path to optimise visitor economy outcomes. This work includes delivering a broad range of strategic supply and demand tourism initiatives including regional marketing, product development, strategic planning, industry development, investment prioritisation, research and advocacy.

These efforts are focused on the High Country's five recognised product strengths in Cycle, The Victorian Alps, Nature-Based Tourism; Food, Drink and Produce and; Arts, Cultural Heritage and Events.



Our Long-Term Vision

To sustain and elevate Victoria's High Country as the lead regional tourism destination in Victoria, with a thriving visitor economy based on destinations of choice, and a compelling range of tourism products and experiences.



Our Purpose

To collaborate with government, industry and community stakeholders to facilitate positive outcomes for the High Country's visitor economy.

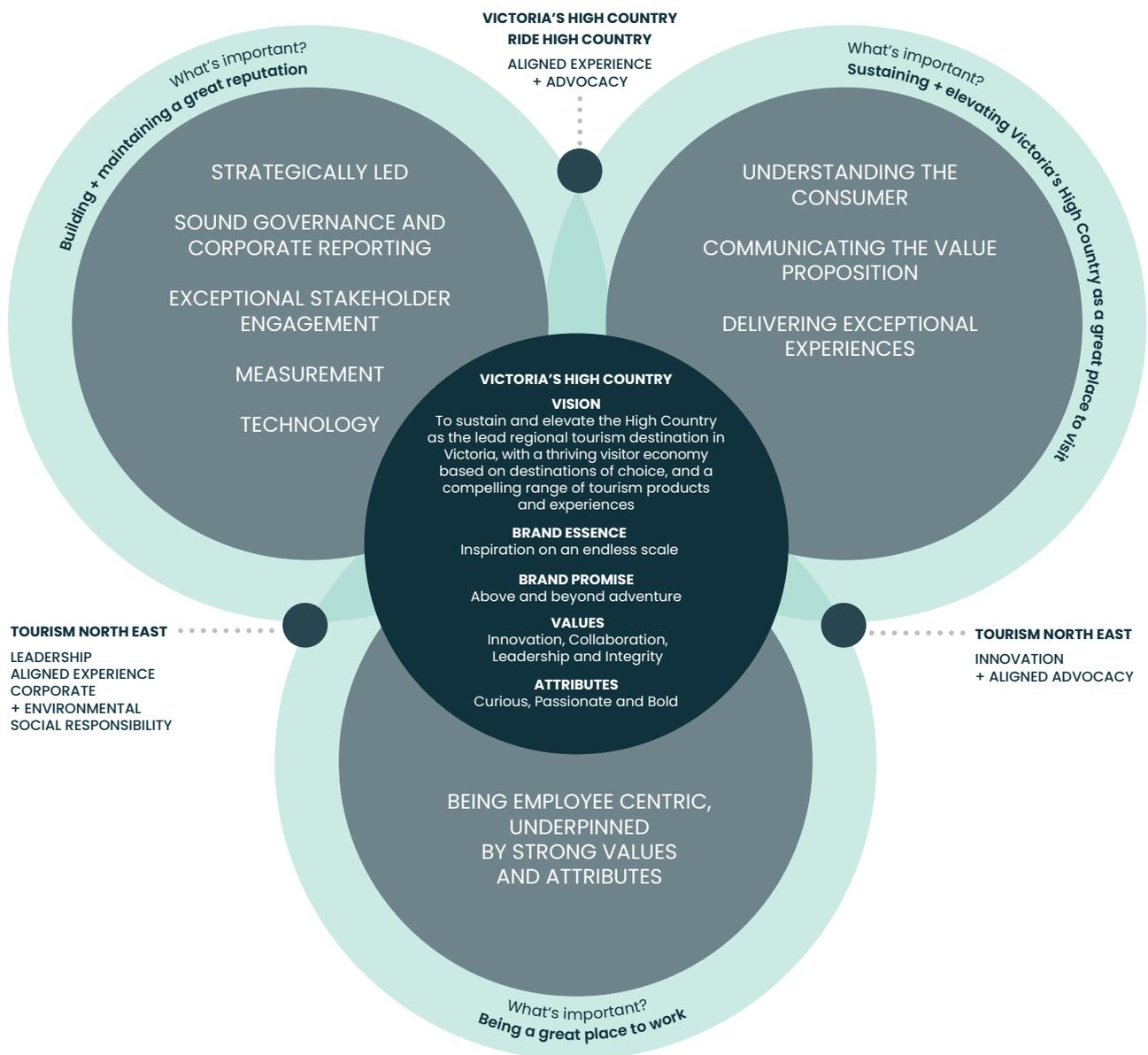
**VICTORIA'S
HIGH
COUNTRY**

Our Brand Promise

Above and Beyond Adventure

Our Culture

As an organisation, Tourism North East strives to employ best practice governance and operating standards to ensure the entity is well respected and is an employer of choice. This approach is based on continuous improvement, adaptability, and a genuine commitment to the wellbeing and success of employees.



F2. TOURISM NORTH EAST OPERATING FRAMEWORK

WHO WE ARE AND THE WAY WE WORK

VALUES

Innovation

Tourism North East optimises supply and demand initiatives through a focus on innovation, seeking new ways to connect with visitors and more effectively meet their needs.

Collaboration

Tourism North East always considers how it can unite a range of different entities in a common tourism path to optimise program outcomes.

Strategic Thinking

Tourism North East develops and acts in accordance with comprehensive strategies that are transparent, accountable and based on sound market insights.

Leadership

Tourism North East sets the regional tourism agenda and leads collective efforts.

Integrity

The organisation, and the people within it, always act within Tourism North East's best interests.

Communication

Tourism North East values high quality, transparent communication.

ATTRIBUTES

We have a mindset of going **ABOVE & BEYOND** and we do this by being **passionate, curious** and **bold**.

Passionate

We love what we do and why we do it.
We are tenacious and celebrate the wins.
We inspire others with the quality of our work.

Curious

We are interested in what is going on and seek to learn new things.
We are humble when searching for the best ideas.

Bold

We challenge the status quo if there is an opportunity to improve.
We are quick to acknowledge our mistakes.
We take smart risks.



3. ENVIRONMENTAL SCAN

There are a range of macro-economic trends impacting the tourism industry, shaping how people travel, where they go, and what they expect along the way.

From economic shifts and evolving consumer preferences to the growing demand for sustainable experiences, the following trends have been evaluated in the creation of Tourism North East's Three Year Strategy.

The top 10 trends are:



CHANGE IN ACCOMMODATION PREFERENCES AMONGST VISITORS

Accommodation preferences have shifted significantly over the years, with travellers increasingly seeking privacy, unique experiences, and flexibility. Factors like the pandemic and the rise of different generations with distinct travel styles have heavily influenced these changes.

- Growth in the use of short-term rental accommodation (STRA), such as Airbnb and Stayz, has outpaced investment in new hotels and motels. In 2017, the number of nights stayed in Airbnb and Stayz in Australia grew 9.6% whilst conventional hotels grew only 5.6%.²
- The proportion of STRA properties that are non-hosted has increased over time, growing from ~70% in 2019 to almost ~80% in 2022.³
- Given commercial accommodation stock in regional Victoria has not traditionally kept pace with visitors expectations, STRA continues to play an important role, filling the gap with high quality properties that attract high spending visitors.
- STRA is also highly suited to families, offering entire homes that allow visitors to be self-sufficient.



CULTURALLY AND LINGUISTICALLY DIVERSE MARKET INCREASINGLY EXPLORING REGIONAL VICTORIA

The culturally and linguistically diverse (CALD) market is a key growing segment for tourism within Australia.

Typically this audience segment gravitates to nature-based environments, seeks an established destination which is 'popular for a reason', and often travels with a group.

It is important for both destinations and tourism operators to understand the needs of this market to meet expectations and support growth in this segment.⁴



SHIFT TOWARDS A PREFERENCE FOR NATURE-BASED VISITOR DESTINATIONS

Nature-based tourism has long been a driver for visitors to explore Victoria. Growth trends in nature-based activity consumption have outgrown every other activity in Victoria in the past ten years.

The High Country is well placed to leverage the growing demand for nature-based destinations and experiences through the numerous assets located within the region, such as the Victorian Alpine Resorts, Alpine National Park and the number of significant waterways.



A NEED TO ENSURE DESTINATIONS ARE INCLUSIVE AND ACCESSIBLE

Accessible tourism, also known as inclusive tourism, ensures that travel and tourism activities are accessible for people of all abilities and diverse access needs. It involves removing barriers and making adjustments to accommodation, transportation, attractions, and services to create an inclusive environment.

By employing universal design principles and promoting equal opportunities and social inclusion, accessible tourism benefits both individuals and the tourism industry.



COST OF DOING BUSINESS

Victoria's tourism industry is facing increased pressure as the cost of doing business increases.

Inflationary pressures such as interest rate rises, increased penalty rates and the climbing cost of general goods and services are putting pressure on profit margins and consumer facing prices, forcing businesses to find operational efficiencies (i.e. close on public holidays or reduce service offerings) and/or charge rates at the top of what is an acceptable price bracket.

Additionally, bushfires present a major hurdle for investment and business operation in the High Country. Much of the High Country is affected by a bushfire management overlay. Insurance in bushfire prone areas for property and businesses adds substantial cost to operators in the region and in some cases is unattainable.

The economic headwinds, increased land tax and short-stay levy are also additional considerations which may impact or limit private sector investment into the future.



WORKFORCE AND HOUSING CHALLENGES

The tourism workforce in Australia grapples with housing challenges that hinder their access to suitable and affordable accommodation. The high cost of housing in popular tourist destinations presents affordability issues, particularly for workers with lower incomes or those employed seasonally.

The seasonal nature of tourism employment further complicates matters, as short-term housing options aligning with employment periods are limited. Additionally, competition with tourists for available housing due to the higher-yielding short-term rental market exacerbates the shortage of affordable options. Geographically isolated regions with remote tourism destinations face an even greater scarcity of housing.

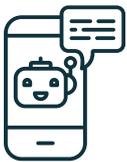
Challenges associated with the planning, funding and implementation of foundational infrastructure, such as sewerage, is constraining growth in residential supply.⁵



DECLINE IN VOLUNTEERISM

Australia has experienced a decline in volunteerism over a sustained period, and the COVID-19 pandemic accelerated this trend. The decline is due to factors such as a change in demographics, increased workforce participation, family commitments and in some cases cost. Volunteering Victoria found that the average out-of-pocket expenses associated with volunteering amounted to appropriately \$1,500 per year (fuel, meals, training).

Despite an overall decline in volunteerism, there is a macro-trend of people moving away from structured volunteering to 'informal volunteering'. However, this cultural shift presents challenges for the tourism industry which has traditionally relied on volunteers to staff visitor information centres, festivals and events.⁶



ROLE OF ARTIFICIAL INTELLIGENCE

Artificial Intelligence (AI) has emerged as a game-changing technology with far-reaching implications across various industries. In recent years, AI has begun to reshape the travel and tourism sector, enabling enhanced personalisation, streamlined operations, and improved customer experiences.

As is the case with many examples of new technology, the undeniable opportunities of AI and data centers must be weighed against risks to employment and the environment.



CLIMATE CHANGE

For destinations like the High Country, with a tourism product that is dependent on the strength and diversity of its natural environment, climate change poses a real and significant threat, particularly through increased frequency of bushfire events, high rainfall and flood events and declining snowfall due to increased average temperatures. Severe weather events are becoming the norm, and it is critical that adequate emergency response is provided to these events. In addition, ensuring industry is resilient and that businesses plan for interruptions in trade will be important for sustainability of the visitor economy in the High Country.

Bushfires

Bushfires are an ongoing risk for the visitor economy in the High Country, the severity and occurrence rate has increased substantially over the past twenty years. Bushfires have had a significant impact on the visitor economy, tourism infrastructure and other assets in the High Country, with six major bushfires affecting parts of the High Country since 2003. Industry and communities need to continue to develop and refine bushfire management plans that reflect the high visitation some destinations experience over the peak fire periods.

High rainfall, flood and storm events

There has been an increasing number of high rainfall, flood and storm events which have had major impacts on the High Country in recent years. High rainfall events provide some benefit in filling the region's lakes, however impacts on infrastructure such as roads and bridges are detrimental and costly. High rainfall in 2022 caused the Falls Creek landslip and resulted in closure of the road and restricted access to Falls Creek over the 2022/23 green season.

Declining snowfall

CSIRO modelling shows that snowfall is likely to continue to decline over the next 30 years with an increase in global temperatures. Historic tracking of snow levels also highlights trends in declining snowfall. The Alpine Resorts in the High Country contribute over \$1 billion in expenditure to the region's visitor economy. The impacts of declining snowfall present a real risk to the viability of the Victorian Alpine Industry's winter product offering.

Continued investment in snow making infrastructure and development of green season products is needed to strengthen the sustainability of the High Country's Alpine Resorts and ensure that the Alpine Resorts continue to drive the region's visitor economy.



SUSTAINABLE TOURISM

Sustainable tourism in the High Country needs to consider the environment, economy and community. The impacts of the visitor economy need to be managed to ensure a triple bottom line approach is achieved, securing long term viability of the industry and the industries and attributes that support it.

Environment

Environmentally sustainable tourism aims to minimise negative impacts on the environment from the visitor economy. A large part of the High Country region consists of bushland, rivers and alpine areas that are unique ecosystems of exceptionally high environmental value. Managing visitor impacts on the environment is important for the long-term preservation of the pristine nature within the High Country and to support visitors into the future.

Economy and Business

When we consider sustainable tourism in the context of the economy, ensuring business financial sustainability is the key element to this. The tourism industry is built on micro and small businesses in the High Country, which are often vulnerable to external impacts. Reducing these impacts and improving sustainability, having a skilled workforce and a supportive business community are all important for enhancing sustainability of visitor economy businesses and an 'only in the High Country' offering.

Community

One of the risks to the visitor economy is the impact on community liveability. Some locations in the High Country have exceptionally high peaks in visitation which create congestion for services such as retail and infrastructure.

Permanent and affordable housing is also critical for supporting sustainable communities. Strengthening year round visitation to the High Country, reducing peaks in visitation and focusing on visitor yield are ways to reduce these risks on the community, improve social ROI and generate net benefits to local residents





4. STRATEGIC RISKS

There are several strategic risks that have the potential to impact the Australian domestic tourism industry. These risks can significantly impede the industry's growth, sustainability, and resilience.

Strategic risks that are relevant to Victoria's High Country include but are not limited to:



ECONOMIC RISKS

- **Economic:** Economic uncertainty and / or instability can potentially reduce discretionary spending, leading to lower domestic travel demand.
- **Rising Costs:** Increases in fuel prices, accommodation costs, and living expenses can make domestic travel less affordable, pushing Australians to seek cheaper international options.



REGULATORY AND POLICY RISKS

- **Changing Government Policies:** Shifts in tourism-related regulations can indirectly affect domestic tourism. i.e. the recently (Jan 2025) introduced 7.5% short stay levy and associated vacant residential land tax could profoundly impact the volume of accommodation stock in the High Country with investors and holiday home owners exiting the market.
- **Overregulation:** Excessive restrictions on activities, land use, or cultural sites have a high potential to limit tourism development. This includes retrospective overlays such as bushfire and flood mapping.
- **Red Tape and Cumbersome Processes:** Lengthy and complicated local government requirements and difficulties working with Council organisations has the potential to discourage private sector investment.



MARKET AND COMPETITIVE RISKS

- **Changing Consumer Preferences:** A shift towards sustainable, eco-friendly, or experiential travel means traditional tourism operators may struggle if they don't adapt.
- **International Competition:** Australians may prefer to travel overseas if international destinations offer more attractive or affordable options post-pandemic. i.e. international winter sports destinations such as Japan are attractive to Australians due to their favourable conditions, cultural offering, perceived value for money and accessibility.



INFRASTRUCTURE AND CAPACITY RISKS

- **Inadequate Infrastructure:** Poor transport links, limited accommodation options, or lack of digital connectivity in regional and remote areas can inhibit delivery of services and erode the visitor value proposition.
- **Overtourism:** High visitor numbers in popular spots can strain local communities and ecosystems, leading to negative experiences and reputational damage.



LABOR SHORTAGES

- **Limited Acquisition and Poor Retention:** A lack of skilled workers in hospitality, transport, and tourism services can affect service quality, especially in regional and remote or seasonal areas.
- **Introduction of Artificial Intelligence (AI), reducing entry level jobs:** The introduction of artificial intelligence poses a significant risk to entry level customer service, retail check out and data processing positions. While the advancement in technology could support addressing labour shortages in some businesses and/or locations, the use of AI has the potential to severely limit opportunities for young people as they enter the tourism workforce. Furthermore, potentially influencing perceptions of hospitality and guest services as viable career pathways and opportunities.



ENVIRONMENTAL RISKS

- **The increased demand on resources:** (water, energy) to service rapidly growing technologies such as AI.
- **Rising temperatures:** Associated with climate change.
- **Increased extreme weather events:** Such as heatwaves, droughts, mega storms and bushfires all severely disrupt travel plans and have the capacity to damage infrastructure.
- **Environment degradation:** From over-tourism and /or introduced species. High tourist traffic and/or specific animals (i.e. wild Brumbies) can impact the natural environment and habitat loss for native flora and fauna, especially in fragile environments.

5. OBJECTIVE + KEY PERFORMANCE INDICATORS

It is the objective of Tourism North East to establish the High Country as the lead regional tourism destination in Victoria, increasing the value of the visitor economy from \$2.3 Billion in 2023 to \$5.9 Billion in 2033.

We aim to transform the region from a mini-break destination into a true holiday destination by increasing the percentage of overnight visitors, sustainably growing the length of stay and average spend across all markets.

MINI-BREAK DESTINATION



TRUE HOLIDAY DESTINATION



5.1 OBJECTIVES

Strengthen Tourism North East's position as an industry leader	<ul style="list-style-type: none"> Be strategically led Focus on building trust with our network of industry operators to create a 'team' culture Conduct regular consumer research, arming industry operators with current insights to improve business operations Set annual SMART objectives (specific, measurable, achievable, relevant, and time-bound) that deliver tangible outcomes for our stakeholders at all levels
Improve awareness of Victoria's High Country in the hearts and minds of visitors	<ul style="list-style-type: none"> Develop and deliver a comprehensive go-to-market strategies that enables high impact destination marketing to drive visitation and length of stay Support stakeholders to secure event funding for regionally significant events that grow awareness of High Country destinations Support businesses within the visitor economy ecosystem to take their individual offering to market
Operate a fiscally responsible organisation to maximise every dollar spent	<ul style="list-style-type: none"> Strategically direct resources to maximise return on investment Operate a balanced budget Proactively seek funding opportunities that deliver strategically relevant outcomes for both the visitor economy and our local communities

5.2 ENABLERS

Building + maintaining a great reputation	<ul style="list-style-type: none"> Employ sound governance and corporate reporting Strive to achieve exceptional stakeholder engagement Use the right tool and technology for the job Maintain a financially sustainable organisation Measure our progress
Sustaining + elevating Victoria's High Country as a great place to visit	<ul style="list-style-type: none"> Understand our existing and potential visitor markets Communicate our value proposition in engaging and entertaining ways that capture the hearts and minds of our target markets Support our industry to deliver exceptional products and experiences
Ensuring Tourism North East is a great place to work	<ul style="list-style-type: none"> Be employee centric by creating a workforce underpinned by trust, strong values and attributes Provide the right tools for the job Provide opportunities and growth

5.3 KEY PERFORMANCE INDICATORS

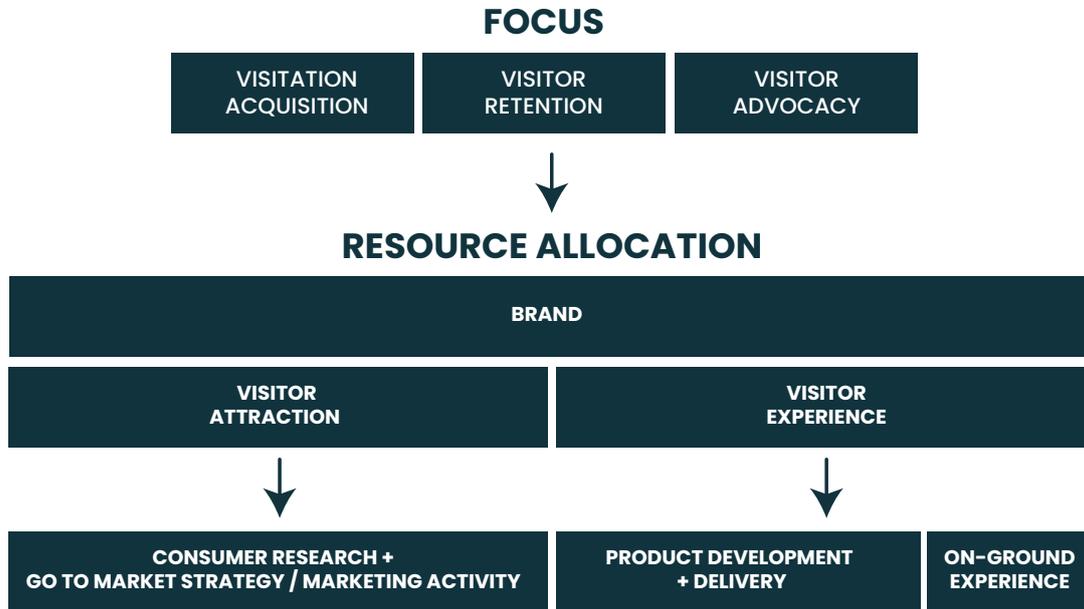
By the YE June 2028, Victoria's High Country aims to achieve the following objectives:

	2023	2026	2027	2028
Day trip visitor spend (spend per trip)	\$154	\$190	\$200	\$210
Overnight visitor spend (Spend per trip)	\$766	\$927	\$972	\$1,019
Average length of stay (nights)	2.9	2.9	3.0	3.0
Cycling Visitors	205,000	245,000	259,000	275,000
International Visitation	2%	2.5%	3%	3.5%
Value of the High Country visitor economy (\$B)	\$2.3 B	\$2.74 B	\$3.05 B	\$3.39 B

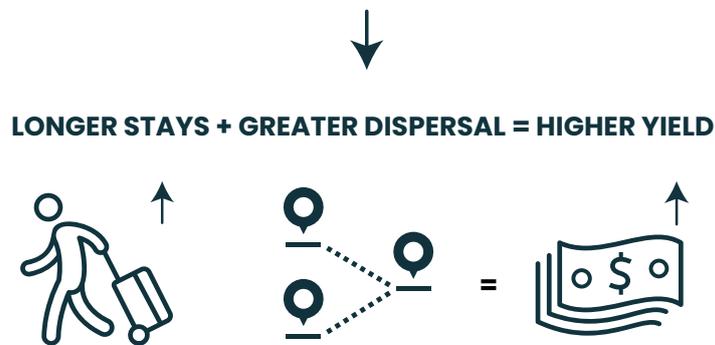
Urban Enterprise, High Country Success Metrics for 2025 to 2028.⁷

6. KEY INITIATIVES

To achieve a meaningful increase across each of the key performance indicators, over the coming three years, Tourism North East will anchor the organisation’s focus on visitor acquisition, visitor retention and visitor advocacy. As such, resources will be directed into two verticals – Visitor Attraction and Visitor Experience.



*Making it as easy as possible for people to
dream, book and do Victoria’s High Country*



VISITOR ATTRACTION

1. UNDERSTANDING OUR TARGET MARKETS

High Country visitors are characterised by two key segments – Lifestyle Leaders, who account for 40% of the region’s visitors, and Habituals who make up 28% of visitor numbers.

Lifestyle Leaders are progressive, educated and professional individuals who actively seek out new experiences. They enjoy an active social life and have extensive social networks in which they are viewed as trusted advisors and influencers. They are higher in affluence and discretionary expenditure than the average Australian, so travel frequently and spend more when traveling.

The Habituals are travellers who come to the High Country each year (sometimes many times a year) and tend to return to a consistent location and often travel with the same group. They are heavily influenced by the recommendations of friends and family members, prioritise value for money, and are often motivated by familiarity with a destination. Both Habituals and Lifestyle Leaders are primarily self-drive markets.

The High Country primarily focuses on Lifestyle Leaders as their propensity to travel, experience new things and consider multiple destinations when they travel means that there is a strong ability to influence them with focused and motivating marketing communication and effective product development. Furthermore, the size of the segment and the yield it can drive within region by way of its higher natural spend, also defines the Lifestyle Leader market as the most valuable market with the potential to provide the greatest return on investment for the High Country.

Although the broad Lifestyle Leader market is a focus, there are several niche markets that make up the overall visitor base, and each of these segments are targeted through strategic communications that highlight relevant and compelling experiences.

2. FOCUSING ON CULTURE OVER CATEGORY

We don’t want the High Country to be another destination on someone’s list. Our goal is to embed the High Country, its welcoming vibe and breadth of products and experiences into the psyche of our past, current and potential visitors. It’s not just a place you want to visit – it’s a place you *need* to visit.

We will achieve this by:

Delivering all brand communications inline with the master brand of ‘Victoria’s High Country’ and our secondary brand ‘ Ride High Country’, hero’ing the five pillars of;

- The Victorian Alps
- Food, Drink and Produce
- Arts, Cultural Heritage and Events
- Cycling
- Nature-Based Tourism; and the specific destinations in which these activities can be enjoyed.

BRAND HIERARCHY



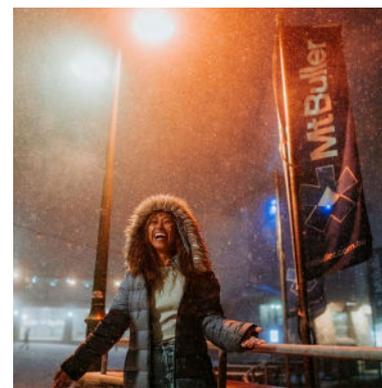
F3. THE VICTORIA HIGH COUNTRY BRAND HIERARCHY



COMMUNICATIONS HIERARCHY



F4. THE VICTORIA HIGH COUNTRY COMMUNICATIONS HIERARCHY

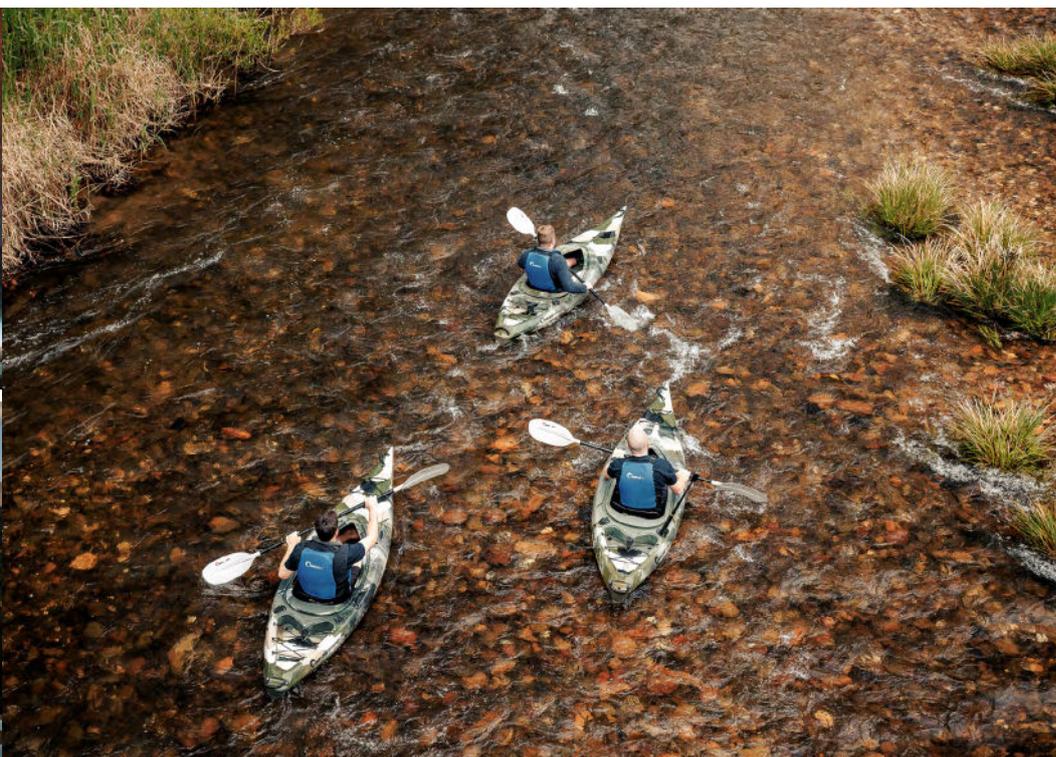


3. ENHANCE PRODUCT POSITIONING, USING COMPELLING MESSAGING WITH THE HIGH COUNTRY'S UNIQUE TONE OF VOICE

Good quality information is imperative to the success of everything we do. As such, Tourism North East will direct resources to improve the quality of information across our owned, earned and paid channels.

We will do this by:

- Clearly defining the High Country's value proposition through the use of clear and compelling messaging utilising the High Country's unique tone of voice
- Leverage the personality of the High Country to tell the stories of the incredible people, places and products that are on offer
- Ensure consistency in brand execution across all channels



VISITOR EXPERIENCE

1. ENHANCING THE CONSUMER EXPERIENCE

Develop and execute initiatives in collaboration with industry operators that directly enhance and/or improve the visitor experience for people of all abilities inline with current market expectations and trends.

We will do this by:

Understanding our core consumer markets better than anyone, including their key motivators, wants and needs, to ensure the High Country delivers a contemporary and desirable product mix that exceeds expectations – resulting in repeat visitation and advocacy for the region.

2. INVESTMENT PRIORITISATION

Collaborate with public, private and industry stakeholders to support investment into flagship projects as per the High Country's Destination Management Plan 2023-2033.

We will do this by:

Prioritising investment into 8 priority initiatives to ensure that every dollar activated within the region will optimise efforts to date, and deliver a strong triple bottom line (social, economic and environmental) return for the community and visitor economy alike.

Flagship projects include:

- Ride High Country
- Activating King Valley Prosecco Road
- Developing the visitor economy of the Victorian Alpine Resorts
- Activating lake Eildon Master Plan
- Creative Industries Invigoration
- First People's Collaboration
- Optimising the visitor experience
- Workforce Attraction, retention and access to appropriate housing

3. DESIGNING FOR IMPACT

Co-create meaningful and memorable, high-quality experiences by working with both private sector and Local Government stakeholders. Through an improved on-ground experience, visitors are more likely to become advocates, resulting in strong word of mouth, repeat visitation and improved dispersal.

We will do this by:

- Streamlining and optimising the delivery and content across all channels
- Improve navigation and access to information
- Employ best practice use of technology aligning with current traveller purchase behaviour
- Leveraging and optimising available national resources. i.e. Australian Tourism Data Warehouse (ATDW)
- An always-on focus of improving our partnership with industry operators and working with them to become the visitor concierge of choice
- Challenge ourselves to continuously improve



7. THE ROADMAP

The following three-year roadmap captures the key themes that will be the focus for each year, providing the strategic foundation for implementing the objectives outlined in Tourism North East's Destination Management Plan (DMP).

Detailed activities to support each of the key themes will be captured in TNE's annual business plan, noting that the progress of selected initiatives is subject to funding.

YEAR 1 2025/26:

Back to Basics.

Expand Reach, Strengthen Community and Align Priorities

Initiative	Output	Outcome
Q1.		
Conduct an audit on the CRM to review the industry database and identify gaps in communication.	Establish a targeted list and strategy to engage with businesses who may not know about TNE or currently do not engage with the organisation.	Grow awareness and unify regional activities and efforts.
Redefine and launch the Ride High Country Preferred Program 2.0.	Develop and deliver a dedicated B2B program to rejuvenate the Ride High Country Preferred program, aimed at increasing bike friendly businesses across the region.	Improved customer experience across the network of accommodation and hospitality businesses. Resulting in a unique selling proposition for the High Country.
Commence an Environmental, Social and Governance (ESG) materiality assessment and identify the most relevant ESG issues for TNE, creating a framework with manageable goals.	An ESG roadmap to support TNE in incorporating ESG into decision making, risk assessments, strategic planning and performance evaluations.	A way of working that underpins everything we do, ensuring TNE continues to demonstrate next-generation leadership across the sector.
Q2.		
Establish a pipeline of networking opportunities that are aimed at delivering genuine value and strengthening the relationships between private sector operators and TNE.	Building a more informed industry leveraging customer insights and behavioural data.	Building trust and alignment across the stakeholder ecosystem, as well as confidence and motivation to improve products, experiences and investment.
Q3.		
Commence a full SWOT review of the NEVCO strategy.	The production of the North East Victoria Cycling Optimisation [NEVCO] Plan 2.0.	A comprehensive strategic roadmap to underpin the next phase of investment and evolution across the cycling disciplines of Road, Gravel, Mountain Bike and Recreational cycling, including but not limited to innovative service and trail management models.
Commence the development of a High Country Waterway Strategy that includes an operational framework to support the private sector leverage key waterways across the region.	A comprehensive strategy that reviews each of the major waterways in the High Country, their management structure and outlines a private sector activation methodology.	An enabling process to support the private sector to activate business opportunities that leverage the waterways of the High Country.
Q4.		
Develop a next-gen product pipeline of priority projects in collaboration with LGA partners, leveraging the High Country DMP 2023-2033.	A regional experience diversification strategy including details of how each investment opportunity will support the High Country to be a competitive destination into the future.	A public and private pipeline of priority projects and complementary prospectus on future-state opportunities for investment.

YEAR 2 2026/27:

Deepen Engagement and Enhance Visitor Experiences

Initiative	Output	Outcome
Q1.		
Lead visitors through the High Country, with location aware place-based content via the High Country App.	Improved editorial content that seamlessly integrates with physical signage.	Delivering more meaningful experiences to visitors, inspiring them to stay longer and spend more.
Q2.		
Stakeholder and Industry Innovation Lab Forum.	Introduction of an annual summit that brings together LGA, Industry and Visitor Information Staff to share visitor feedback and participate in the development of experience improvement strategies.	Improved collaboration across public, private and community stakeholders.
Q3.		
Showcase High Country people, places, products and experiences through experiences and packaging.	An industry supply and demand program targeted at packaging.	An increase in bookable products, focused on stay and play packages with a single POS.
Q4.		
Renewal of the product pipeline of priority projects in collaboration with LGA partners, leveraging the High Country DMP 2023-2033.	A regional experience diversification strategy including details of how each investment opportunity will support the High Country to be a competitive destination into the future.	A current public and private pipeline of priority projects and complementary prospectus on future-state opportunities for investment.

YEAR 3 2027/28:

Sustain, Innovate and Review

Initiative	Output	Outcome
Q1.		
Conduct an assessment of source markets to identify diversification opportunities.	A source market gap analysis that identifies growth opportunities.	Reduction of 'hot spot' dependencies and improved consistency of year-round visitation.
Commence a 12 month rolling roster of product co-creation sprints with the private sector.	Increased and improved products.	More bookable products that encourage dispersal and yield.
Q2.		
Development of a High Country events strategy.	A three-year events strategy for the High Country aimed at attracting marquee events and defining a growth strategy of local destination driving events.	Consolidated events proposition for the region and strategic events calendar.
Q3.		
Launch of a visitor acquisition campaign grounded in storytelling.	A content rich, integrated marketing campaign showcasing how to get the most out of your High Country trip.	An increase in interstate visitation over a 12 month period.
Q4.		
Renewal of the product pipeline of priority projects in collaboration with LGA partners, leveraging the High Country DMP 2023-2033.	A regional experience diversification strategy including details of how each investment opportunity will support the High Country to be a competitive destination into the future.	A current public and private pipeline of priority projects and complementary prospectus on future-state opportunities for investment.



REFERENCES

1. Tourism Research Australia Data
2. Deloitte Access Economics, 'Tourism and Hotel Market Outlook', 2018
3. https://news.airbnb.com/wp-content/uploads/sites/4/2024/01/FINAL_JAN24_Report_STRA-and-Housing-in-Australia-2023.pdf
4. Quantum Market Research, 'CALD Visitor Research', 2023
5. SGS Economics & Planning, 'North East Workforce Management and Appropriate Housing Discussion Paper', 2022
6. Professor Amanda Davies, Head of School at The University of Western Australia's School of Social Sciences, "How can we bolster Australia's depleted army of volunteers to match the soaring demand for their services?", 2023 (www.uwa.edu.au)
7. Urban Enterprise, High Country Success Metrics for 2025 to 2028

Published, November 2025

HIGH
COUNTRY
^ thing.

  @seehighcountry

tourismnortheast.com.au

victoriashighcountry.com.au

ROLL		T
A09		
Director	N. RICHMOND	SCENE
Camera	S. FAWCETT	1
Date	24.08	B