TOURISM NORTH EAST

THREE-YEAR STRATEGY 2019/20–2021/22

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EXECUTIVE SUMMARY

Tourism North East (TNE) is one of eleven regional tourism boards established at the directive of Visit Victoria, the State's tourism and events entity. TNE represents the region known as the High Country, which includes six shires – Alpine, Benalla, Indigo, Mansfield, Towong and Wangaratta – and the three major alpine resorts of Falls Creek, Mt Buller/Stirling and Mt Hotham. TNE is charged with developing the long-term strategic direction for High Country and establishing it as the lead regional tourism destination in Victoria.

TNE has developed a Three-year Strategy to provide focus for its tourism efforts and to clearly define the organisation's role in realising the strategic objectives outlined in Victoria's High Country Destination Management Plan 2013-2023. This approach has been adopted to provide synergy between the strategic activities of TNE and its local government and industry partners.

The North East currently attracts nearly 3.8 million visitors per annum who spend $1.145 billion when in-region, accounting for 19% of gross regional product and 21% of employment. This Strategy looks to drive continued growth in the region's visitor economy.

To do this, TNE will leverage and enhance the region's key product strengths – cycle, food/drinks, snow, nature-based, and arts/cultural heritage – and take them to market with engaging pillar brands that resonate with consumer segments. In particular, this offering will target the valuable Lifestyle Leader segment, primarily within the region's core intrastate market.

Several trends are expected to impact the tourism landscape over the life of this plan, and therefore affect the outcomes of the Strategy: broader Australian tourism trends, changing demographics, the growth of the visiting friends and relatives market, the growth of the sharing economy, and climate change. Fast moving, high-impact micro trends will also impact the tourism industry: the rise of civic brands, a challenging attention economy, the rise of neo-kinship, the establishment of the optimised-self, and the conflicting forces of social dislocation and re-engagement.

Within this context, TNE is looking to lead Victoria's North East in achieving regional growth at a level reflective of the long-term targets identified in the Destination Management Plan. This includes increasing total High Country visitation by 8%, growing domestic overnight visitation by 2% and increasing domestic overnight and day visitor spending by 4% and 2% respectively (all against the five year rolling averages for each category). Realising these objectives will require the collective efforts of the entire region, including ongoing investment in infrastructure, product development and marketing campaigns of scale.

To achieve these objectives, TNE will look to deliver on seven goals that are consistent with the regional priorities highlighted in the Destination Management Plan:

1. To achieve an ownership position in the cycle tourism space and be recognised as Australia's premier bike destination
2. To lead innovation in the food and drinks space, creating a competitive differentiator for the High Country that drives tourism related visitation and yield opportunities throughout the region
3. To evolve the winter offering of the major alpine resorts to ensure they continue to appeal to the visitor market and drive visitation, yield and job opportunities throughout the region.
4. To develop and promote a range of leading nature-based tourism experiences that are common across the High Country and drive regional visitation and yield.
5. To establish the region's arts and culture credentials to both diversify the demographic attracted to the High Country and increase dispersal
6. For the High Country to set industry best practice for the use of digital technologies across all aspects of the region's offering, delivering a superior consumer experience that differentiates it from competitors
7. Maintain a strong organisation that proactively leads regional tourism efforts and delivers positive outcomes for the High Country

Throughout this Strategy, TNE has defined the strategic approach required to progress and/or deliver on each of these goals, within a set of pillar-specific trends, challenges and considerations. It has noted specific key focus areas under each goal, supported by the key performance indicators and targets required to deliver positive tourism outcomes for the region.

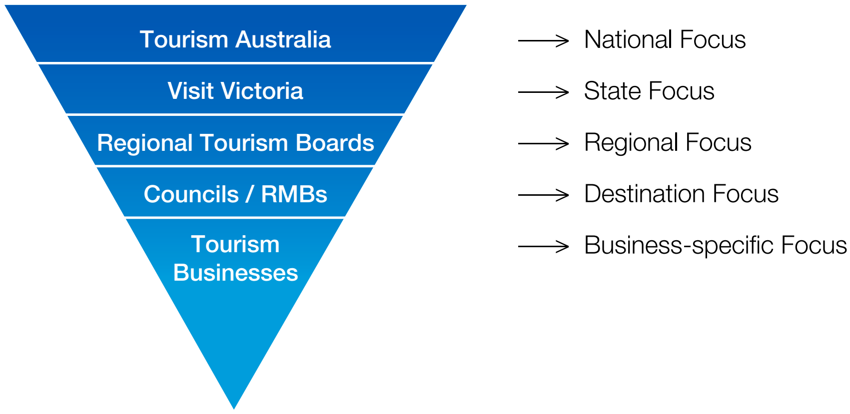
The budget required to deliver on this Strategy will be determined on an annual basis and reflected in an annual Business Plan. This budget is subject to funding secured from Visit Victoria, local government partners (councils and resort management boards), industry and various grant funding opportunities (which currently account for 51% of TNE's budget).

The Business Plan will outline the initiatives required to deliver on the strategies and targets identified in the Three-year Strategy. The Business Plan will be reviewed and reported on quarterly, while the overarching Strategy will be reviewed and reported on annually to allow for ongoing program optimisation.

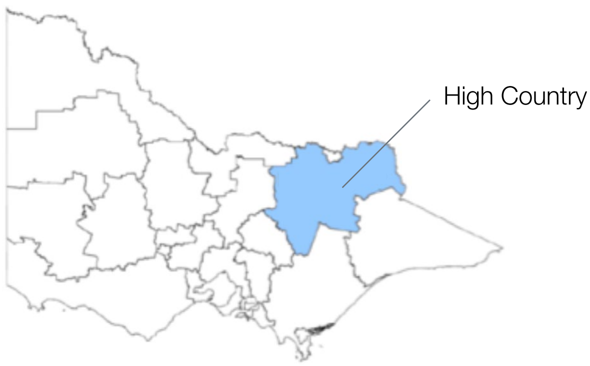
1. TOURISM NORTH EAST

Tourism North East is one of eleven regional tourism boards established at the directive of Visit Victoria, the State's tourism and events body. The regional tourism boards (RTBs) were created to act as the peak tourism organisations for their areas, working in partnership with Visit Victoria, industry and a range of government partners to support and develop regional tourism.

These RTBs sit within a broader Australian tourism industry, which are interrelated but have their own specific focus areas, as noted in the following diagram:



Tourism North East (TNE) is the tourism board that represents the north-east of Victoria, which is the region known as the 'High Country'. This region includes six shires – Alpine, Benalla, Indigo, Mansfield, Towong and Wangaratta – and the three major alpine resorts of Falls Creek, Mt Buller/Stirling and Mt Hotham.



TNE is governed by a Board of Directors that includes the CEOs of all the shires and resort management boards represented in the High Country, along with up to six skills-based appointees, overseen by an independent chairperson. The Board is committed to sound governance principles, and supportive of a collaborative and innovative company culture that allows for effective regional tourism leadership.

TNE is a not-for-profit incorporated association that is primarily funded by the High Country's councils and resort management boards, Visit Victoria and State and Federal Government byway of various grant funding programs.

2. VISION AND SCOPE

TNE is charged with developing the long-term and overarching strategic vision and direction for the High Country region, ensuring a platform for future tourism growth. Its efforts are guided by the following vision and supporting mission statement:

Vision:

To establish the High Country as the lead regional tourism destination in Victoria, with a thriving visitor economy based on diverse and engaging tourism experiences.

Mission Statement:

Tourism North East will work collaboratively with government and industry partners to drive visitor economy growth through the strategic development, enhancement and promotion of the High Country's tourism offering. It will deliver consumer-centric supply and demand side tourism efforts that stimulate visitation, yield and dispersal, and generate strong stakeholder outcomes.

In realising this vision, TNE has several key responsibilities:

> **Regional marketing** – developing regional campaigns that look to drive awareness of the High Country and activate latent demand for its tourism experiences

> **Product development** – identifying gaps in the regional tourism offering and working with local government and industry partners to fill them, particularly in areas where the High Country can achieve differentiated product strengths.

> **Industry development** – working with tourism operators to enhance their offering and ensure long term sustainability, delivering a high-quality and consistent regional tourism product.

> **Promoting tourism investment** – identifying infrastructure and investment opportunities and/or partnerships among private and public entities.

> **Research** – collaborating with local government and industry partners to determine common research requirements that can generate insights used for strategic planning for the region.

> **Advocacy** – uniting advocacy efforts across a variety of areas including funding support and legislative and policy issues.

> **Strategic planning** - leading strategic planning for the region as well as providing consultation for State and Federal tourism plans and programs.

3. THREE-YEAR STRATEGY

This Strategy identifies the strategic focus areas for TNE between 2019/20 and 2021/22. It has been structured to support the regional direction outlined in *Victoria's High Country Destination Management Plan 2013-2023*, a plan that determines tourism priorities over the coming decade and looks to unify government and industry in a common development path.

This Strategy therefore complements the Destination Management Plan by highlighting TNE's specific role in realising the long-term tourism objectives of the region as established in that document. This approach has been adopted to ensure true synergy between the efforts of TNE and its local government and industry partners, with all parts effectively maximising the efforts and outcomes of the whole region.

As identified in the Destination Management Plan, growth in the High Country's visitor economy will come as the result of focus and funding in three key areas – infrastructure enhancement/development, product/industry development and marketing.

TNE supports its tourism partners in the development and delivery of key tourism infrastructure projects, as it is not financed or resourced to deliver on the ground developments, nor does it own or control any land/tourism assets. This involves TNE leading scoping work for new regional tourism experiences, where it develops concepts with supporting feasibility studies or business cases that are then adopted by government and/or industry partners for implementation. It also includes TNE providing strategic and advocacy support for infrastructure projects led by partners that are of significance to the region and its product pillars.

In terms of product and industry development, TNE plays a key role in working with existing and new tourism businesses to activate a broad range of tourism assets and leverage the broader investment that has been made in tourism infrastructure. TNE assists operators with addressing key business issues, capitalising on current market trends, and delivering memorable tourism experiences in support of the product pillars.

As for demand driving activities, TNE leads the delivery of innovative and integrated marketing programs, uniting the regional offering under strong product brands and taking them to market with campaigns that drive awareness and conversion. This work is supported by robust consumer and market insights garnered through comprehensive research and tourism networks.

4. HIGH COUNTRY PERFORMANCE

For the year ending December 2017, the High Country attracted 3.4 million visitors who generated $1.015 billion in direct visitor spend[1]. This is the first time that visitor spend in the High Country surpassed the billion dollar mark, delivering a milestone moment for the region.

Since that time, visitation and spend growth has been maintained. As of September 2018, 3.79 million people visited Victoria's High Country, spending $1.145 billion when in-region. This represents an impressive 17% growth in visitation and spend compared to the same period in 2017[2]. These results ensure that tourism maintains its position as one of the lead industries for the High Country, accounting for 19% of gross regional product and 21% of employment.

The High Country's visitors are primarily from the domestic market. The most lucrative of these is the overnight market, which attracts 1.9 million visitors who generate $911 million in spend, with the daytrip market attracting 1.8 million visitors who contribute $215 million to the local visitor economy.

The region also attracted over 30,600 international overnight visitors in 2018, who generated a further $19 million in local spend. International visitation has remained fairly static for the last decade, despite a steady growth of inbound tourism to Victoria.

5. REGIONAL PRODUCT PILLARS

The High Country is defined by its product strengths – the five product pillars that are shared across the region and are unique to the local offering. To both focus and maximise the effectiveness of TNE's efforts, everything the organisation delivers is in association with these products:

Cycle Tourism

The High Country is acknowledged as having the strongest cycle tourism credentials in Victoria, attracting more cycle tourists than any other regional destination in the State. Building product strengths around three cycle disciplines – road cycling, mountain biking and rail trails – has been key to this success, as very few cycling destinations are able to provide a strength in all three cycling typologies. While the region is experiencing a stage of strategic growth, ongoing investment in the cycle offering is required to fill identified product gaps, meet evolving market demand and maintain the High Country's role as an industry leader. Category ownership will also come from unlocking clear latent demand for the region's cycle tourism offering through large scale marketing campaigns, where immediate action is required to secure first-mover advantage.

Snow

This product category encompasses the vast array of unique snow-based activities available in the alpine resorts, which includes traditional sports like skiing and snowboarding as well as other snow experiences like skidoo rides, snow shoeing, dog sledding and snow tubing. The stunning alpine landscape also forms the perfect backdrop to enjoy food and wine experiences, luxury spa indulgences, a growing arts and cultural heritage offering and a range of other village and activity options. Ongoing experience and infrastructure investment is required to ensure that the resorts broaden their market appeal for future sustainability, and maintain their position as regional economic drivers.

Food and drinks

The food and drinks pillar is mature and diverse, encompassing wineries and cellar doors, world-class restaurants, seasonal farm gate experiences, rich local produce, cooking schools, craft breweries, distilleries and more. This product range has played a vital role in placing the High Country in the minds of visitors as a destination of choice for many years, and is important in that it acts as an anchor strength across all of the other product pillars. However, ongoing innovation within this sector is required if it is to maintain its strong position and continue to meet changing customer expectations.

Nature-based Experiences

The High Country's unique alpine environments and rich fertile valleys make it a popular nature based tourism destination. Visitors can participate in fishing, boating and water sport activities, biking and trail running across the peaks and throughout the valleys, and also take advantage of other adrenalin focused experiences such as micro-lighting, abseiling, caving and gliding. A signature nature-based tourism experience for the region is walking, which encompasses product ranging from low-impact, short walks around town through to challenging, multi-night hikes across the peaks. While this is a truly regional tourism experience, it requires further product development in terms of both hero infrastructure and private sector activation, and increased awareness amongst key target segments.

Arts and Cultural Heritage

The High Country has a rich arts and cultural heritage pedigree associated with its gold mining history, unique Aboriginal ties, and the legend of Ned Kelly and Man from Snowy River. However, this is the product pillar that is least mature or collaboratively developed for the High Country, driven by consumer expectation rather than on the ground product. As such, focus in this area is on the development of the types of contemporary, immersive and engaging arts and cultural heritage tourism experiences that visitors are demanding, meeting the expectations of current visitors and attracting key cultural tourism segments.

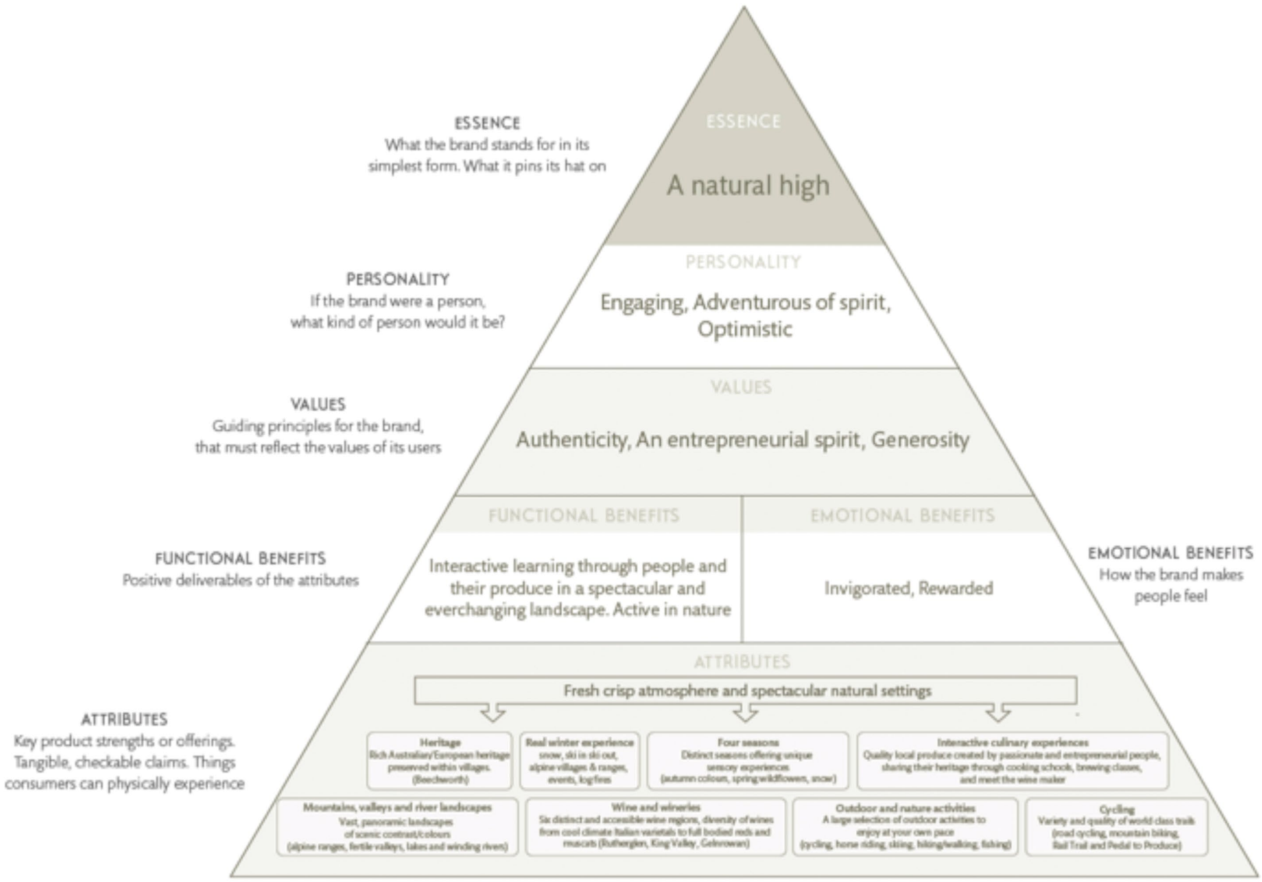
6. HIGH COUNTRY BRANDS

a) Victoria's High Country

Visit Victoria has developed clear and differentiated brands for each of the State's tourism regions. Victoria's north-east is captured by the brand 'the High Country' which points to mountain adventures and a sense of discovery within a stunning and diverse natural environment. The High Country brand essence is defined as follows:

> "No matter the altitude, whether you are in a valley, on a plain or on top of a mountain, it's about invigoration and feeling rewarded by authentic interactive experiences all leading to a natural high. Naturally spectacular and adventurous."

The brand pyramid represents the sum of the brand's parts.



Brand and perception research commissioned by TNE[3] has found that the region's landscape, geography and topography are what set the High Country apart from other destinations. Travellers to the region also frequently comment on the High Country having 'a soul', with its primary associations being nature, food and wine experiences, ski fields, fresh air, clear skies and quaint country villages. The common thread throughout the qualitative findings are that the region has an authentic, peaceful and relaxing feel surrounded by a scenic and pristine environment full of friendly and genuine people that leaves visitors feeling recharged when they leave.

b) Pillar Brands

One of the most significant tourism issues faced by the High Country is lack of awareness. The region's distance from the primary market of Melbourne and knowledge gap about the offering presents a risk of the unknown for potential visitors.

This risk can be mitigated through a sustained marketing effort that is capable of building awareness of the region and inspiring visitation. In order to optimise the success of these marketing programs, TNE has taken the High Country master brand and leveraged its favourable associations to develop targeted pillar brands that have the ability to achieve cut-through with specific market segments. In this way, TNE is able to engage key markets with customised brands and messaging that truly connect with potential visitors and activates the region's product pillars. An additional benefit of this approach is that having multiple High Country product brands in market at the same time amplifies market impact associated with the 'High Country' concept.

These product brands effectively develop an association with a specific activity (pillar) and the region (High Country) that then funnels down into awareness of individual destinations that the region is comprised of. The current regional product brands are as follows:

RIDE HIGH COUNTRY

feast HIGH COUNTRY

WALK HIGH COUNTRY

The Ride High Country brand unifies the cycle tourism category; Feast High Country represents the food and drinks industry; and Walk High Country has been selected as the experience to lead the nature-based tourism pillar. These three brands are currently in market, supported by integrated marketing programs.

A brand has not been developed for the snow pillar as the awareness funnel – that directs consumer awareness from the regional to destination-specific brand – does not apply to the alpine resorts, which enjoy strong awareness independent of a regional brand.

In terms of Arts and Cultural Heritage, the pillar is still in its infancy from a regional perspective with a strong need for experience development before a pillar brand is required to take it to market. However, this is the long-term view for this product category.

7. CUSTOMER SEGMENTS

Lifestyle Leaders is the lead consumer segment for the North East, accounting for 40% of its visitor market. 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 of others. They are higher in affluence and discretionary expenditure than the average Australian, so travel frequently and spend more when traveling.

Across Australia, Lifestyle Leaders account for approximately 32% of the population. In order to address what is essentially a large market segment more efficiently and effectively, Visit Victoria recently commissioned a body of work that looked to align Lifestyle Leaders with more specific consumer segments called Helix Personas. Helix Personas have been developed by Roy Morgan, using deep psychographic insights, far beyond simple demographics, to segment consumers into targetable groups. The tool incorporates values, beliefs and attitudes which are the best predictors of consumer behaviour, allowing for more targeted marketing and product development.

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 communications and effective product development. Furthermore, the size of the segment and the yield it can drive within region through its higher natural spend also defines it as the most valuable market with the potential to drive greatest return on investment.

Over the life of this Strategy, TNE will work with Visit Victoria and partners to utilise the new Helix Persona framework to optimise its supply and demand side tourism initiatives. In particular, it will consider how this framework can complement the consumer segmentation research that TNE has commissioned across winery/ cellar door, cultural, walk and cycle tourism, where pillar specific consumer targets have been identified.

8. TARGET MARKETS

In the year ending September 2018[4], 99.2% of visitors to the High Country were from the domestic market. Of this market, 52% visited just for the day, spending an average of $111 per trip. Those who stayed overnight (48%) stayed for an average of 2.8 nights - generating a total of 5.2 million visitor nights - and spent $177 per night when in-region.

Of the domestic overnight market, 79% were from intrastate with majority being from Melbourne (45%) and the remainder being from regional Victoria (34%). In terms of the interstate market (21% of domestic overnighters), NSW was by far the largest source market (11.7%) followed by South Australia (3%).

During the same period, international overnight visitors accounted for less than 1% of the High Country's visitor market, and generated 304,700 visitor nights. The UK was the region's largest source market for visitors (14.2%) followed by New Zealand (14%), USA (10%) and Germany (7.5%).

As such, the focus of the region's marketing efforts is the intrastate market - primarily Melbourne followed by regional Victoria - as it is the largest and most valuable in terms of visitor spend. This approach also places the North East in a good position to leverage Visit Victoria's own intrastate efforts, maximising marketing spend and impact. Consideration will also be given to how campaigns can be extended most effectively into interstate markets like NSW to capitalise on existing visitation from these traditionally longer-stay and therefore higher yielding markets.

While the international market is currently very small for the High Country, it continues to grow at pace for the State. As such, it will not be an immediate focus for the region, however TNE will develop a long-term view of how to grow regional opportunities in this space. This includes consideration for how to best leverage the visiting friends and relatives market, which is inherently linked to the region's core domestic market, and how to integrate with the broader tourism efforts of Visit Victoria and Tourism Australia.

9. EXTERNAL ENVIRONMENT ANALYSIS

Several macro and micro trends are expected to impact the tourism landscape over the life of this plan, and therefore affect the outcomes of the Strategy:

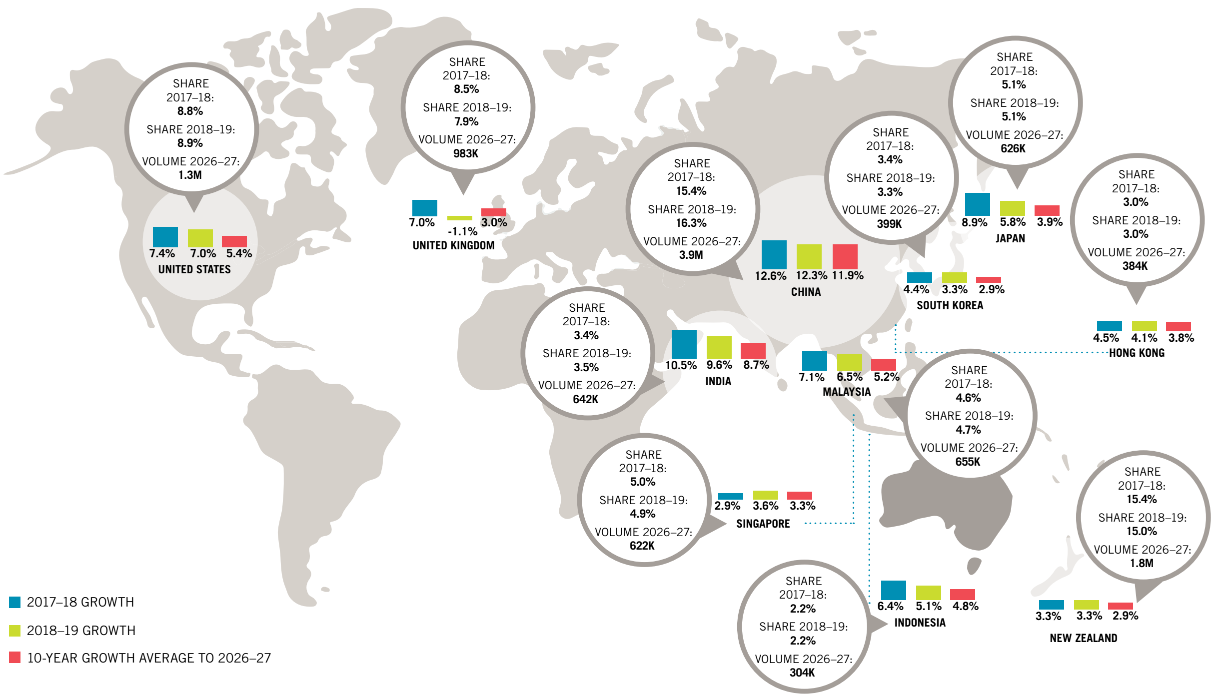
Australian Tourism Trends

Tourism Research Australia forecasts[5] that by the end of 2020, total overnight tourism spend in Australia (excluding day trips) will reach $131 billion, placing the industry slightly above the midpoint of the $115 -$140 billion spend target set under the Tourism 2020 Strategy. By 2026-27 this figure is expected to increase to $151.4billion, which represents a 50% growth from 2016-17 figures or an annual growth rate of 4.1%.

Much of this growth will be fuelled by international visitation, which will increase by 75% by 2026-27. International leisure travel – comprising holiday travel and to visiting friends and relatives (VFR) – will continue to be a major contributor to inbound tourism over this period.

Australia will continue to have a high proportion of its international visitors come from its top five inbound markets – China, NZ, the US, the UK and Singapore. Collectively, these five countries are forecast to provide almost two-thirds (62%) of the additional 6.5 million arrivals expected in 2026–27. Around 2.6 million, or a 40% share of these additional arrivals, will be from China.

ARRIVALS GROWTH AND MARKET SHARE BY MAIN MARKETS, 2017–18 AND 2026–27



By 2026-27, the domestic visitor market is also forecast to grow, with visitor nights expected to increase 25% from 338 million to 421 million nights – an average annual growth rate of 2.2%. This modest growth is reflective of the fact that Australia's population growth is expected to ease and the large baby boomer segment is likely to age, impacting propensity to travel.

Among the states and territories there is little variation in long-term growth rates in domestic visitor nights, except for Victoria where above average growth is expected (increasing 4.4% per year to 206 million nights).

Changing Demographics

While Millennials are often referred to as the youth market, the reality is that they are aging and moving into a new life stage, becoming parents and managers, now constituting the majority of business travellers. The true youth market are Generation Z or Centennials.

Although Millennials and Centennials are both generations emerging right in the midst of the digital age, there are substantial differences between the two. Millennials seek freedom to develop their work and personal projects; they are innovative, question authority and are experts at using technological tools and social networks. In contrast, Centennials are characterised as being self-educated, loyal, creative, favour financial security, and are deeply concerned about their employment options and thus show a much more realistic attitude than the preceding generation on their career conditions.[6]

Travel has become a high priority for many Centennials and Millennials who are prioritising travel experiences and adventures over purchasing material items. Food in particular continues to be a driver for Millennials when they travel, and as parents they are also very conscious of nutritional choices for their families. They have also spent longer than other generations in the family home, and are therefore attracted to multigenerational trips.[7]

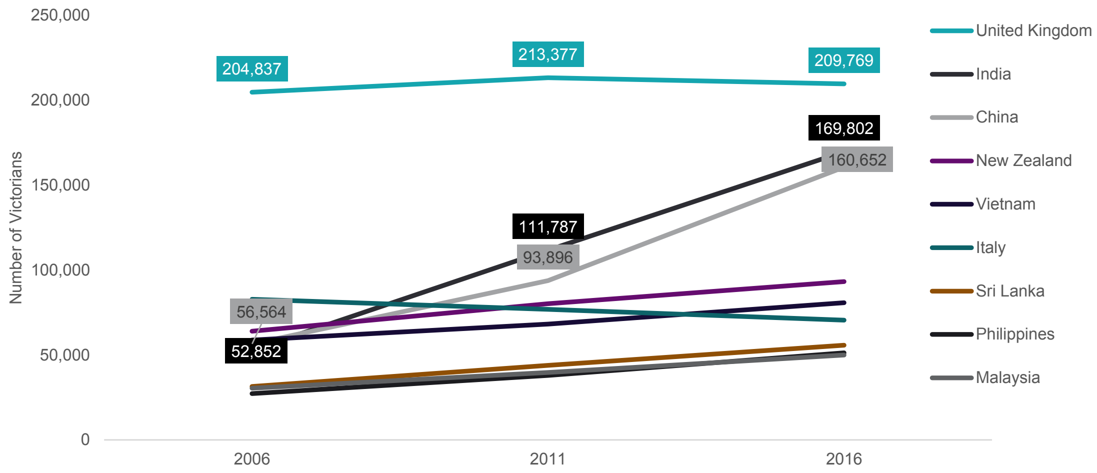
On the other end of the scale are the Baby Boomers, who represent 25% of the Australian population but account for 53% of the country's wealth. They have a strong desire to travel, with the 65-74 age group alone showing an 80% increase in holidaying overseas over the past 5 years. Time rich and with an ever-rising life expectancy, they will be a driving force in the travel industry for the next two decades.[8]

Migration and VFR Growth

Australia continues to grow its ethnic diversity, with the population forecast to comprise of 45 different ethnic groups in the near future. Indeed, in the 2016 Census, 28% of the Australian population was born overseas, but 49% of the population was either born overseas or has at least one parent who is.

Victoria's population is also being strongly driven by migration, with three times as many Victorians born in China and India compared to a decade ago, with an ancestry mix (beyond country of birth) even greater than this.[9]

Victoria by Country of Birth



Source: Australian Bureau of Statistics, Census Data

Visit Victoria notes that those born overseas have different travel behaviours to those born in Australia, and they have little knowledge of the tourism offering outside of Melbourne. This creates challenges in terms of destination awareness but also defines a market with great potential.[10]

In terms of the Chinese and Indian New Melbournian market, particular opportunity is associated with the significant VFR market:

20% of visitors from China and 50% from India are here for VFR

Source: Tourism Research Australia, International Visitor Survey. Year Ending December 2017. Visitors to Victoria by Stopover Reason. Countries with over 100k visitors shown.

The Sharing Economy

The sharing economy has continued to grow, with more than two thirds of Australians now earning and spending money through this channel. Fuelled by organisations like Air BnB and Uber, the sharing economy has shifted social attitudes around ownership and community. This shift has impacted traditional tourism sales channels and created opportunities for new types of visitor experiences as well as innovation of existing ones.

Climate Change

Much of the tourism product in the High Country is dependent on the strength and diversity of the natural environment. Climate change poses a real and significant threat with an increased occurrence of bushfires, issues with water supply management, environmental degradation, rising temperatures and erratic weather conditions. The real and perceived impacts of these forces have the potential to significantly impact tourism opportunities and growth.

Civic Brands

Brands are shifting from hierarchical to decentralised, product-led to service-led, and closed to collaborative. As a result, brands need to re-establish themselves as being trustworthy, driven by legacy, and leaders of genuine change. They must stand for something, communicating a real sense of purpose to connect with consumers, even if it puts them at odds with a certain portion of the population.[11] In line with this, the needs of the consumer must be placed at the core of brands and the organisations they represent, and an understanding of what is important to them fostered in order to maintain relevance. From a tourism perspective, industry must develop an intimate knowledge of their current and potential visitor base, and recognise that remaining true to this group and what they stand for will inspire loyalty.

Attention Economy

Consumers now exist in an attention-based economy where the continual wave of stimuli makes it hard for people to concentrate on a chosen subject, understand things in detail or determine what matters and needs to be actioned. Brands and experiences that wish to be truly seen and heard must endeavour to cultivate in-depth focus in order to stand out. However, they not only need to capture attention but work to sustain engagement and forge relationships with consumers.[12] Within the tourism and destination landscape, consideration also needs to be given to establishing a strong sense of calm to encourage visitors to address the focus deficit for their mind and body, easing the anxiety of being ‘always on’.

Neo-Kinship

The traditional nuclear family is rapidly disappearing, replaced by more fluid and complex forms of kinship, facilitated by technology that is deeply embedded into people's lives. While this technology has made life easier and enabled people to connect with others globally, it has impacted their ability to develop meaningful connections. With this in mind, images of idealised families no longer appeal to the majority of consumers, whose relationships are far more complex than the 2.4 children model.[13] Brands need to abandon tired marketing tropes and better reflect reality, acknowledging that relationships are far more complex than ever before.

Moving forward social VR platforms will transform the way consumers form relationships online, making the technology attractive to a far broader audience than just gamers. The embracement of AR/VR and the layering of technology will provide businesses with new ways to engage, entertain and create meaningful relationships with consumers. Consumers are also increasingly comfortable talking to artificial intelligent bots, opening up opportunities for brands to deliver personalised, one-to-one customer service to scale.

Dislocation vs Re-engagement

The world is becoming increasingly dislocated, characterised by distrust, disconnection, disenfranchisement and disorder. While change is inevitable, life is becoming more fragmented and there is a lack of assurance about the future, which has resulted in many people looking to distance themselves from 'the system' and embracing grassroots initiatives more strongly than ever before. This is being countered by a desire for genuine re-engagement, where people are looking to form new communities with people that embody similar values and beliefs.[14] In terms of tourism, destinations must consider how to foster engagement and meaningfully connect with these new communities, and industry must be clear about their purpose not just their product.

The Optimised Self

Consumers are now working to be the best they can be as an individual, rather than relative to others in a competitive sense. People are working towards an 'optimised self' where they are looking to transform their mind, body and emotions to achieve an ever-changing ideal.[15] Looking at the impact this will have on tourism – there will be a growing demand for product personalisation and towards experiences that support people in their personal transformation. The opportunity to work with visitors and develop real relationships through this support is critical to tourism vibrancy.

10. THREE-YEAR REGIONAL OBJECTIVES

Within this tourism landscape, TNE will look to drive High Country visitation growth at a level reflective of the long-term targets identified in the Destination Management Plan – targets that are owned as a region as opposed to an individual entity – and in alignment with visitation results achieved to date.

That is, by December 2021 TNE aims to grow visitation to the High Country by 8% based on five-year visitation averages, starting from a 2018 average of 3,212,610 annual visitors. Rolling averages rather than point-to-point comparisons are used by TNE as they allow for natural fluctuations within the tourism market and industry.

Aside from growing the base number of visitors coming to the High Country, the region will also look to grow domestic overnight versus day visitation by 2% over the life of the plan to increase yield opportunities for the region. During the same period, it will work to grow average domestic overnight spend by 4% and domestic day visitor spend by 2%.

While TNE as an organisation drives the strategic direction of tourism within the region, the achievement of these objectives is one shared by the High Country as a whole. Realising these objectives will require the collective efforts of the entire region, including ongoing investment in infrastructure, product development and marketing campaigns of scale.

As TNE only controls approximately a portion of the expended tourism budget associated with the region, the impact of the collective influence of private operator initiatives and marketing programs of local government, resort management boards and other tourism associations must also be recognised.

11. STRATEGIC FOCUS

To achieve these objectives, TNE will look to deliver on seven goals that are consistent with the regional priorities highlighted in the Destination Management Plan. These goals are:

1. To achieve an ownership position in the cycle tourism space and be recognised as Australia's premier bike destination
2. To lead innovation in the food and drinks space, creating a competitive differentiator for the High Country that drives tourism related visitation and yield opportunities throughout the region
3. To evolve the winter offering of the major alpine resorts to ensure they continue to appeal to the visitor market and drive visitation, yield and job opportunities throughout the region.
4. To develop and promote a range of leading nature-based tourism experiences that are common across the High Country and drive regional visitation and yield.
5. To establish the region's arts and culture credentials to both diversify the demographic attracted to the High Country and increase dispersal
6. For the High Country to set industry best practice for the use of digital technologies across all aspects of the region's offering, delivering a superior consumer experience that differentiates it from competitors
7. Maintain a strong organisation that proactively leads regional tourism efforts and delivers positive outcomes for the High Country

Under each of these goals, TNE will implement a range of initiatives that can be measured by clear key performance indicators (KPIs) and associated three-year targets, ensuring transparency and accountability. The output of these efforts will contribute to achieving the overarching visitation outcomes pursued by TNE and the region.

12. STRATEGIC DIRECTION

A) CYCLE TOURISM

To achieve an ownership position in the cycle tourism space and be recognised as Australia's premier bike destination.

Overview

The High Country aspires to own cycle tourism and be recognised as the premier cycling destination in Victoria. The region currently attracts more cycle tourists than any other regional destination – 105k dedicated cyclists who generate $49 million in visitor spend. Cycle tourism is growing at twice the level of general tourism, with cycle visitor numbers forecast to increase by 155% by 2025.

Category ownership will be realised through optimising visitation opportunities associated with the three distinctive cycle tourism disciplines where the region has proven strengths: mountain biking, road cycling and rail trail riding. In order to provide a focus for these efforts, TNE in conjunction with Regional Development Victoria has developed a Masterplan that looks to optimise cycling opportunities throughout the region, creating world class cycling experiences that drive significant growth to the visitor economy.

The Masterplan identifies a range of priority projects that offer the greatest cycle tourism growth opportunities for the region. These priority projects deliver on four key areas required to achieve cycle tourism category ownership:

> **New and enhanced cycle product experiences:** Deliver an ongoing program of new and enhanced cycle tracks and trails that entice and excite the target markets to visit the High Country region.

> **Cycle friendly region:** Implement world's best practice initiatives that provide a visitor friendly cycling experience for all cyclists with up to date and clear visitor information, orientation points, signage, services, supporting transport infrastructure and bike hubs.

> **Complementary product and experience:** Ensure that complementary food, beverage and accommodation product is continuously developed in the region to meet cycle tourism market needs and expectations.

> **Driving demand in cycle tourism:** Deliver ongoing marketing initiatives and events that position the High Country as a leader in cycle tourism and grow demand for the regional bike offering.

Regional Trends, Challenges and Considerations

Marketing Investment

Research has shown that investment in marketing and activating latent demand will have the single biggest impact on the High Country's cycle visitation[16], so a successful and sustained marketing program over the life of this strategy (and beyond) is key. To this effect a $4.4 million campaign has been committed to promote the Ride High Country brand – a campaign that commenced in 2018/19 but will primarily roll-out over the life of this strategy. This represents a significant marketing spend for the High Country and must be optimised at a regional, destination and business-specific level while available.

Customer Conversion

The call to action for the cycle tourism marketing campaign is the Ride High Country website. Once on this site, customers can view profiles and contact details of regional tourism businesses but there is no mechanism to book single or multiple products and multi-destinational itineraries. Considering that the second half of the Ride High Country marketing program will focus on conversion, a streamlined booking process and seamless customer journey must be implemented to maximise sales opportunities.

Emerging Disciplines
As new cycle disciplines emerge, the High Country must continue to innovate its offering to meet demand and truly own cycling across the category. There has been a significant surge in the popularity of gravel riding, while the steady adoption of e-Bikes (pedal-assisted bicycles) has made riding more accessible to a broader market demographic. Other niche cycle tourism markets are also developing including bike-packing (a form of adventure, multi-day bike touring) and fat-biking (specialised bikes with fat tyres for riding on sand and snow). These new disciplines come with their own product, servicing and marketing needs that the region will need to be cognisant of.

Increased Competition
Many destinations throughout Australia are looking at developing or growing a cycle tourism offering. It is essential that the region move swiftly and decisively to secure a cycle tourism ownership position or it will lose first-mover advantage in this space. This will result from category leading marketing but also from the ongoing evolution and integration of the region's cycle experiences.

Holistic Regional Offering
While the cycle-specific offering holds the strongest appeal to key cycling segments, the supporting regional tourism experiences – particularly nature-based and food/drinks products – have also been identified as a strong motivator. An ongoing focus on using cycle as the pillar lead, underpinned by the broader regional tourism offering will be key to amplifying efforts in this space. Value will also be derived from the promotion of experiences that encompass multiple product pillars (like Pedal to Produce, which crosses cycle with food/wine) particularly amongst the recreational ride segment.

Strategic Approach

The NEVCO Masterplan is a robust, collaborative and strategic body of work that has defined a vision for category ownership. It sets a blueprint for development that captures infrastructure, marketing and private sector activation that is consistent with TNE's own portfolio scope. As such, the Masterplan will guide TNE's three year strategic efforts in this pillar.

In terms of supply, TNE will work with its Government and industry partners to realise the Masterplan priority projects. These efforts will involve providing strategic and advocacy support to realise the implementation of major infrastructure projects, as well as taking the lead in other collective experience and development initiatives.

TNE will look to activate existing and emerging tourism assets through industry, working with them to improve, enhance and diversify their product so the region continues to provide cyclists with innovative experiences that meet their needs. A particular focus will be on the development of cycle experiences in areas where there are identified product gaps.

As for demand, TNE will deliver an integrated and engaging Ride High Country marketing campaign of scale. Delivered over a four-year period, the campaign will look to drive brand awareness in years one and two, and conversion in the second half of the program. TNE will also look at how it can drive demand and reinforce the market leading positioning by working with stakeholders to secure high profile cycle events.

Outside of the priority projects, TNE will also support industry and partners in activating destination-specific cycle tourism initiatives, particularly those identified as second tier opportunities in the Masterplan. While TNE will not lead these projects, it sees great value in supporting initiatives that add to the depth and breadth of the regional cycle offer and allow destinations to more effectively leverage broader regional efforts.
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Three Year Strategic Focus

Objective	Strategy	KPI	Target
To achieve an ownership position in the cycle tourism space and be recognised as Australia's premier bike destination	Implement an integrated Ride High Country marketing campaign that drives cycle tourism demand and positions the High Country as the lead cycle region in Australia	The delivery of an annual marketing program and realisation of key campaign metrics The level of cycle visitation and spend	One campaign of scale delivered per year with clearly defined metrics for program outputs YOY visitation and spend growth in line with Ride High Country 4-Year Marketing Strategy vitiation and spend targets
	Support LGA/RMB partners to progress and implement Priority Projects identified in the NEVCO Masterplan	The number of infrastructure projects that TNE is involved with from a planning and/or advocacy perspective and the results achieved	Two key Masterplan projects progressed per year with results to vary per project
	Where required, lead the delivery of NEVCO Priority Projects on behalf of regional partners	The successful delivery of TNE managed projects that implements or strategically progresses NEVCO priority projects	The delivery of two significant bodies of work over the life of the Strategy (subject to funding)
	Work with LGA/RMB partners to progress destination specific cycle tourism initiatives (outside of the Priority Projects) that have the ability to diversify/strengthen the regional cycle offering	The number of projects that TNE is involved in and the benefits it delivers to the project	Active support and involvement in one major destination specific project per year
	Work with industry partners to improve and/or diversify the cycle tourism offering and ensure a high-calibre visitor experience	The number of businesses engaged via individual or group development sessions to enhance the regional cycle offering	40 businesses engaged in association with the cycle tourism offering per year
	Support LGA/RMB partners in securing bike events that drive visitation and/or secure the region's position as a leader in cycle tourism	The number of events progressed and secured	Assist partners in progressing one significant event lead per year; and one large-scale event to be secured over the life of the strategy

B) FOOD AND DRINKS

To lead innovation in the food and drinks space, creating a competitive differentiator for the High Country that drives tourism related visitation and yield opportunities throughout the region.

Overview

Of the 22 official wine regions found in Victoria, six of them are located in the High Country. This includes 96 wineries that are highly active, with many offering high-calibre vineyard dining, behind the scenes tours and tastings, and cellar door experiences (both public and private). This is complemented by a thriving and active microbrewery culture, with 13 craft breweries operating in the region and an emerging market of micro distilleries offering gin and whiskey style products.

The High Country is also renowned for its diverse food offering, which includes hatted restaurants, an abundance of quality local produce, an array of hands on cooking classes, a selection of popular farmer's markets and a budding agritourism offering. This product portfolio is supplemented by a growing coffee and café culture that includes four dedicated coffee roasters.

While the food and drinks category has long driven tourism growth in the region, it must continue to evolve in order to maintain relevance and meet the needs of the changing consumer market, which is where TNE focuses its supply and demand side tourism efforts.

Regional Trends, Challenges and Considerations

Awareness Inhibiting Winery Tourism Growth

Consumer segmentation research[17] has identified that the primary factor limiting wine tourism in the High Country is a lack of awareness of the region. Underlying the lack of understanding is that North East Victoria is not first thought of as a wine region. These findings are consistent with research commissioned across other product pillars that points to the need for sustained marketing investment to address issues associated with awareness and remove barriers inhibiting winery tourism growth.

Holistic Regional Appeal

In terms of the High Country winery tourism proposition, there is widespread positivity about the offer as it is favourably associated with being less commercialised, down to earth and authentic. However, when looking at motivators to visit and partake in winery tourism, the regional story is just as important as the wineries and cellar doors themselves, with 62% of the target market attracted to the region ahead of a specific winery or wine[18]. This provides a key insight for market and product development efforts in terms of the need for positioning the winery tourism experience within the broader regional context.

Victorian Wine Product Pillars

While the diversity of the Victorian wine offering is seen as a State strength, it also poses a challenge for marketing efforts. In response, Wine Victoria has looked to elevate product heroes considered competitive differentiators for the State to provide focus for tourism efforts in domestic and international markets. It has defined five wine tourism pillars that aim to bring together premium food and wine experiences, with two of them being in the High Country – Prosecco Road in the King Valley and the Fortifieds Resurgence in Rutherglen. With State and Federal backing, there is now a concerted effort to build Victoria's profile in association with these products, which presents a strong opportunity for the High Country in relation to its winery tourism efforts. Consistency of message and activities between the State, region and associated GIs will be central to optimising outcomes in this space, as well ensuring that the tourism experience on the ground effectively supports State positioning.

Agritourism Yield and Dispersal Opportunities
Consumer segmentation research[19] has demonstrated that agritourism is a yield and dispersal agent rather than a tourism driver. While it will not provide the single motivation for people to visit the High Country, when they are in-region they expect to be able to engage with high-calibre and accessible agritourism experiences, with 68% of all potential visitors looking to partake in these activities. Effectively harnessing this market will enable the region to drive spend (particularly as agritourists have a significantly higher daily average spend than many sectors) and encourage visitation to multiple High Country destinations. With this in mind, the High Country must consider how to communicate the agritourism offering when in-region and arrange products in trails within clusters for ease of consumer access and navigation. This will also assist the region in taking advantage of the casual agritourism interest that defines mainstream engagement with this offering.

Strategic Approach

The food and drinks segment is important in that it underpins all of the High Country product pillars. To ensure that it maintains its relevance and strength among the region's target markets, it is essential that the offering continues to innovate, and that the industry behind it embrace ongoing tourism product evolution.

Under the last three-year strategy, investment was made in several significant pieces of consumer segmentation research – a process that will continue into the life of this plan across this diverse and mature product pillar.

These insights will guide the implementation of Feast High Country marketing programs designed to drive product awareness and demand in association with this pillar. Continued positioning around the 'people, produce and place' concept currently pursued under this brand will allow for market differentiation and operator connection to the program.

From a supply perspective, TNE will work with industry to ensure that the on-the-ground food/drinks experience continues to innovate and appeal to a diverse customer base. This includes working across industry to improve the current available offering, but also working with businesses to develop new market-leading products and experiences. Greatest gains in this area will come from working with industry leaders who have the strongest capacity to innovate and deliver signature food/drinks experiences that the region can be known for.

Three Year Strategic Focus

Objective	Strategy	KPI	Target
To lead innovation in the food and drinks space, creating a competitive differentiator for the High Country that drives tourism related visitation and yield opportunities throughout the region	Implement a Feast High Country marketing program that drives awareness of the innovative High Country food/drinks offering	The successful delivery of an annual marketing program that realises key campaign metrics	At least one Feast High Country campaign per year with annual metrics to be determined in association with campaign budget and scope
	Deliver a research program that provides insights that guide strategic development	The delivery of insightful research projects that effectively guide strategic efforts	Delivery of two research pieces over the life of the plan
	Work with industry to develop innovative products that meet the needs of target segments	The number of new products delivered each year	Two new products developed each year that are supported/ facilitated by TNE
	Work with industry to enhance, grow and/or diversify their food/drinks tourism offering	The number of businesses engaged via food/drinks focused individual and group development sessions	80 businesses engaged for food/drinks development sessions each year
	Support, showcase and advocate for hero operators (individuals and groups) that deliver innovative and best practice food/drinks experiences	The number of hero projects progressed with the support of TNE, and the benefits they deliver	Two major projects progressed each year

C) SNOW

To evolve the winter offering of the major alpine resorts to ensure they continue to appeal to the evolving needs of the visitor market and drive visitation, yield and job opportunities throughout the region.

Overview

The High Country is home to Victoria's three major alpine resorts – Falls Creek, Mt Buller and Mt Hotham – and the smaller, undeveloped resort of Mt Stirling. These resorts are significant contributors to the visitor economy, attracting 762,000 visitors per annum who generate 1.5 million visitor days.[20] As such, winter resort visitors account for 20% of the region's total annual visitation, and are a key source of visitor spend and job creation.

Importantly, the northern resorts continue to experience impressive growth, with visitor numbers up 24% compared to the ten year average, and visitor days up 20%.[21] While this growth sustains the industry, it also generates a number of capacity issues, particularly resulting from the imbalance that often occurs between midweek and weekend visitation. Conversely, there are periods throughout winter – even in peak season – where the resorts have a high degree of availability and need to attract greater visitor numbers and yield.

Ongoing investment in the development and diversification of the winter resort offering, is required to ensure that the resorts can continue to deliver an optimal visitor experience to existing guests and generate strong appeal to new markets.

Regional Trends, Challenges and Considerations

Funding Challenges for Major Developments

The resorts are funded almost entirely by leaseholders and visitor-generated revenue. This self-funding model combined with high operating costs can make it difficult to raise the capital required to invest in tourism infrastructure, particularly the type of large-scale projects that are needed to evolve what is a mature tourism offering. This issue is further exacerbated by the fact that RMBs and resorts are often unable to access the same State and Federal grant funding programs and subsidies as councils, despite being charged with the same responsibilities as LGAs.

Environmental Considerations

The resorts must develop tourism experiences within a unique and sensitive ecological framework. Any development must effectively balance development and growth with the natural and culturally significant values of the alpine environment. This can be challenging, with new tourism opportunities often faced with strict development restrictions, onerous permit and approval processes, and expensive environmental assessments and off-sets.

Climate Change

Predicted increases in temperature and decreasing precipitation due to climate change is likely to result in dramatic changes in the alpine region. This includes a reduction in snow falls, with snow cover already declining by approximately 30% since 1954,[22] but also more extreme weather events that generate a different range of issues. While the resorts proactively plan for climate change via a range of adaptation strategies, including greater investment in snow making and grooming, it still presents a significant tourism challenge for this hero product.

Advocacy Focus

While the resorts are key economic drivers for the region, there is a lack of recognition of the collective impact they deliver to the regional visitor economy. This, combined with the unique political, environmental, financial and governance framework in which they operate, can make development challenging. It will be important to unite the resorts in a common advocacy path that clearly articulates the value of the resorts, tourism development opportunities, and potential for private and public sector investment to accelerate growth.

Growing Culturally and Linguistically Diverse Markets
While the High Country as a whole attracts less than 1% international visitation, the alpine resorts – as individual destinations with a unique Australian product – attract significant numbers of inbound guests. In addition to this, they also hold great appeal to the New Melbournian Resident market, meaning that they are attracting greater numbers of culturally and linguistically diverse visitors. With different travel trends and often little experience with snow, the resorts must continue to diversify their offering to capture these new markets, particularly via yield generating activities.

Strong Brand Awareness
Visit Victoria recently commissioned research[23] that looks to understand top of mind destination awareness amongst the Melbourne market, and also assess consumer knowledge of destinations in context of experiences and regional image attributes. Looking at winter, the major resorts were a standout when naming destinations associated with the season, with Mt Buller (41%), Mt Hotham (23%) and Falls Creek (21%) being the most recognised destinations across the State. As such, the resorts have strong brand awareness, which must be leveraged in marketing efforts.

Collaborative Marketing Management
The collaborative winter marketing campaign, most recently administered by the ARCC, now sits with TNE under the RTB framework endorsed by Visit Victoria. This provides new opportunities for campaign delivery and growth, as well as greater synergy between TNE's demand and supply side tourism efforts. It also provides greater opportunity for a range of industry partners to engage with the marketing program by way of TNE's industry development efforts.

Strategic Approach

The snow offering associated with the three major alpine resorts represents a truly unique selling proposition for the High Country that cannot be reproduced in any other region. Ongoing growth and diversification of the winter offering in Victoria's major alpine resorts is central to both optimising this competitive differentiator and sustaining the broader High Country tourism market.

As the resorts are very mature in their offering and outlook, greatest impact will be had through the implementation of high-impact tourism and infrastructure projects. TNE will therefore work with the resorts, particularly the RMBs, to identify and prioritise visitor economy opportunities, and support stakeholders in driving implementation of associated projects. Such support may include advocacy for funding, identification of new commercial opportunities, or strategic input into new developments.

It will also be important to work with existing resort stakeholders and operators to improve their visitor offering to meet current and emerging demand. This includes looking at how to improve any new tourism investment as well as working with businesses to develop strategies for growth and sustainability, allowing for a continuity of resort product and a more seamless visitor experience. Working with industry to enhance a collaborative mentality will also continue to be a focus to ensure strong strategic alliances between agencies and stakeholders. TNE will prioritise working with operators and resorts where there is a willingness and true opportunity for TNE to impact collective change in this regard.

Now that TNE is managing cooperative marketing efforts it has the ability to work with key resort stakeholders to develop a promotional program that addresses common resort challenges and opportunities, and optimise stakeholder support and buy-in.

Three Year Strategic Focus

Objective	Strategy	KPI	Target
To evolve the winter offering of the major alpine resorts to ensure they continue to appeal to the visitor market and drive visitation, yield and job opportunities throughout the region.	Provide strategy and advocacy support for visitor economy development opportunities for the alpine resorts and their stakeholders	The number of projects that TNE is involved in progressing and the benefits the organisation is able to deliver to the resorts in terms of strategy and advocacy	The production of an alpine resort development plan to guide development/ advocacy efforts; and the progression of two major projects identified within that strategy
	Work with resort businesses to improve their operations and/or visitor offering	The number of winter specific business engaged via individual or group development sessions	40 businesses engaged per year regarding winter opportunities
	Identify new tourism experience concepts that can be activated by the resorts	The number of concepts developed and the level of support given for implementation	One new concept to be developed each year; and TNE to support associated stakeholders with the implementation of two experiences over the life of the plan
	Take a lead role in collaborative snow marketing efforts to drive awareness and conversion associated with resort priorities	The successful delivery of an annual marketing program that realises key campaign metrics	One winter marketing campaign delivered per year with annual metrics to be determined in association with campaign budget and scope

D) NATURE-BASED TOURISM

To develop and promote a range of leading nature-based tourism experiences that are common across the High Country and drive regional visitation and yield.

Overview

In the year ending December 2017, there was a total of 14 million visitors to and within Victoria who engaged in at least one nature-based activity on their trip, accounting for 18% of all visitors to the State. This represents an 8% increase from the previous year, and a 36% increase over a prior three-year period[24].

With an abundance of natural assets, the High Country is well positioned to cater for these visitors. The region offers a broad range of nature-based tourism experiences that includes horse riding, water sports and fishing through to more niche adrenalin focused experiences like micro-lighting, abseiling and gliding.

As this product pillar is so diverse, one product is used to provide focus for current marketing and experience development efforts – walking. The walk offering encompasses everything from low-impact town walks, through to multi-day hike across the peaks, with the High Country exhibiting natural credentials and diversity of product in this space. This is a tourism experience that is common across the region, and one for which there is high existing uptake across all of the High Country's target pillar segments, so the region is well positioned for collaborative growth.

Regional Trends, Challenges and Considerations

Walk Product - Consumer Perceptions

Walk consumer segmentation research commissioned by TNE[25] shows that the High Country is viewed favourably as a walking destination, with 43% seeing it as very favourable ("a great place for me") and 51% seeing it as somewhat favourable ("an OK place for me"). In driving growth of this product, the region does not have to overcome any negative perceptions about the offering but does need to address clear issues associated with lack of awareness, particularly in light of the strong competitive position owned by Grampians as the only true top-of-mind walking destination in Victoria.

Falls to Hotham Alpine Crossing

Design work is underway for an iconic walk product for the region - the Falls to Hotham Alpine Crossing – which will act as a hero for the category amongst national and international markets. When completed, this walk will also be part of a branded portfolio of four distinctive long-distance walks called Walk Victoria's Icons, representing a significant tourism opportunity for both the High Country and the State. This product has the potential to be the jewel in the crown of the region's walk offering, supported by Visit Victoria and Tourism Australia's marketing efforts. Building a strong position for the region in this space in readiness for the launch of this product will be key.

Nature-based Tourism Operators

People are looking for experiential and engaging nature-based tourism experiences that offer high levels of interpretation, services and accommodation. There is also growing demand for facilitated experiences, particularly activities that allow for some level of learning or skill-building.

Current nature-based tourism operators have relatively small operations with limited ability to innovate or diversify their product to meet these needs, or to take their offering to market via diverse sales channels. Efforts are further hampered by high operating costs associated with insurance and meeting safety/regulatory requirements.

Nature-based Accommodation

In the broader nature-based tourism space, there is a demand for accommodation that is unique and located within natural surrounds – in forests, near water or showcasing natural assets to enable visitors to feel closer to nature. Options range from basic eco-style accommodation or glamping, through to larger five-star development delivered in sympathy with the natural environment. This includes opportunities at Mount Buffalo, particularly in association with the activation of the Mount Buffalo Chalet and surrounding destination. This product gap points to opportunities for relevant and astute tourism operators and investors.

Strategic Approach

Over the life of this plan, investment in sustained Walk High Country marketing efforts will be key to driving product and destination awareness and stimulating latent interest in the offering. TNE will lead efforts to deliver a multifaceted campaign that leverages both Visit Victoria and Tourism Australia's efforts in this space, and develop a known and competitive position against current destination leaders.

While there is a great diversity of walk product available through the High Country, there is a need for concerted focus on enhancing this offering to build on its hero pillar status. To this effect, TNE will assist partners with developing and growing signature walk product over the life of this plan, which includes the delivery of high-quality trails supported by appropriate signage, services and interpretive experiences. Of particular focus will be opportunities within the alpine resorts, as is reflective of the focus of the Destination Management Plan.

Key to efforts in this space will also be working with industry to create experiences that activate existing and emerging assets, and create a commercially leverageable walk product. This work will be important in creating a strong consumer and product base prior to the launch of the Falls to Hotham Alpine Crossing in future years. While the walking product has been elevated to lead efforts in this pillar, it is important that TNE continues to support nature-based tourism operators outside of the walk space. This will ensure that the region maintains its natural pedigree within this pillar, and sustains a diversity of offering.

In a similar manner, TNE will also look at how it can drive strategic growth in terms of the region's waterway product, which is considered a longer-term nature based tourism opportunity common across a number of LGA and even RMB partners. Preliminary work in this space under the last three-year strategy indicates that opportunities for the development of new waterway experiences to meet the needs of the Lifestyle Leader segment are still limited. As such, TNE will achieve the greatest level of return in this area through working with local government partners on larger scale strategic opportunities that have the ability to impact change.

Three Year Strategic Focus

Objective	Strategy	KPI	Target
To develop and promote a range of leading nature-based tourism experiences that are common across the High Country and drive regional visitation and yield	Implement a Walk High Country marketing campaign that drives awareness of the region as a diverse and appealing walking tourism destination	The successful delivery of an annual marketing program that realises key campaign metrics	Deliver one Walk High Country marketing campaign per year with annual metrics to be determined in association with program budget and scope
	Work with industry and stakeholders to develop a suite of walking experiences that establish the High Country as a lead walking tourism destination	The number of strategic projects that TNE is involved with and the benefits it delivers	The progression of one major walking project per year; and the implementation of one walking experience per year
	Work with relevant LGA/RMB partners to develop strategic waterway tourism opportunities	TNE involvement in the progression of strategic tourism waterway projects	TNE to be involved with and/or progress at least one strategic waterway project per year
	Work with tourism operators to enhance, diversify and/or improve their nature-based tourism offerings	The number of businesses engaged for nature-based tourism via individual or group development sessions	20 businesses engaged per year for nature-based tourism purposes

E) ARTS AND CULTURAL HERITAGE

To establish the region's arts and culture credentials to both diversify the demographic attracted to the High Country and increase dispersal.

Overview

Tourists travelling for arts, culture and heritage pursuits have seen steady global growth, as it offers an appealing way for visitors to engage with the destination they are visiting. Importantly, research has shown that these types of tourists are looking for experiences that are contemporary, immersive and experiential, and enable them to connect with people and places in a meaningful and memorable way.

Amongst domestic cultural tourists, interest in Australian history is almost universal. There is also strong demand for sites with significant historical importance, which presents a strong opportunity for the High Country. The High Country has a rich history associated with mountain cattleman, the legend of Ned Kelly, gold mining heritage, and ties with a unique indigenous culture. The region is also known for its range of quaint historic towns and villages, which feature charming streetscapes that allow visitors to immerse themselves in a bygone era. As such, it is well positioned to enhance its offering to capitalise on interest in these types of experiences.

Evolving the artistic, cultural and historic assets of the High Country to meet the current experience expectations of visitors will be key to capturing this high value market.

Regional Trends, Challenges and Considerations

Destination Competition and Experience Development

'Arts and Culture' is a product pillar of Melbourne, and one that it delivers on with a true depth and breadth of experiences. If the High Country is to attract cultural tourists out of Melbourne – the region's core visitor market – then it must be via a range of engaging products that are either specific to the High Country, or strongly leverage one of the region's unique product strengths.

There are also a number of other regional destinations that are front of mind with the core Melbourne market in the arts and cultural heritage space, like Bendigo and Ballarat. The development of hero products that can differentiate the High Country offering will be key to competing with these regions.

Ned Kelly Unique Selling Proposition

The High Country is in a unique position in that it effectively owns the Ned Kelly story, with the most pertinent parts of the Kelly history occurring within the region. As such, it has the potential to develop a Kelly tourism experience that is a distinctive selling proposition for the region – a competitive differentiator that will act as a compelling tourism driver if developed and delivered to meet market demand. Indeed, cultural tourism segmentation research[27] commissioned by TNE found that 70% of the target market said they were interested in finding out more about the Ned Kelly story. In-line with this, the optimal execution will be immersive, where the attraction is worth visiting for more than just the story itself.

Aboriginal Tourism Experiences

72% of cultural tourists are open to engaging with the Aboriginal culture of North East Victoria, seeing it as an opportunity to establish real and authentic connections with Traditional Owners on-Country.[28] The development of cultural experiences in this space will require a long-term tourism vision, supported by dedicated product development resource (including capacity within the RAPs) and entrepreneurial programs that provide tourism training and development for a population with high youth representation (55% of Aboriginals living in the Hume are under 25)[29].

Historic Assets

From a consumer perspective, the High Country has a natural pedigree in the historic assets space which has strong market appeal. The ability to offer an immersive experience that enables visitors to 'stand where it happened' provides strong opportunity in this space.

Strategic Approach

The arts and cultural heritage pillar is in a product development phase, whereby the focus is on establishing the types of tourism experiences that meet consumer expectations. As pillar research demonstrates, this focus necessitates replacing static, one dimensional and interpretive products with rich, immersive and experiential opportunities.

In line with this, TNE's focus will be on working with industry and partners to develop signature products that can act as pillar heroes for the region. This work includes enhancing existing assets to better connect with target markets, as well as the creation of new tourism experiences that can reinvigorate the offering. Work in this space will be guided by a focus on game-changer projects – those that have the ability to lead the pillar and demonstrate true credentials in the arts and cultural heritage space.

The implementation of market leading experiences will then allow for a focus on the development of smaller-scale activations and products that can both support and leverage these signature experiences, creating a critical mass for the pillar.

Over the life of this plan, TNE will also look to develop strategic partnerships for the region in this space that optimise current projects and provide a platform for future market growth.

Three Year Strategic Focus

Objective	Strategy	KPI	Target
To establish the region's arts and culture credentials to both diversify the demographic attracted to the High Country and increase dispersal	Work with industry and stakeholders to develop signature arts/cultural heritage experiences that are contemporary, engaging and immersive and meet the needs of target segments	The number of products developed and/or enhanced per year	Over the life of the plan: implementation funding secured for one new signature project; and one existing signature experience significantly enhanced
	Work with industry to develop arts and cultural heritage experiences that support the hero products (as established) and leverage other product pillar strengths	The number of businesses engaged via individual/group development sessions in association with arts and cultural heritage experiences	15 business engaged each year of the plan; and two new experiences developed with industry per year.
	Develop strategic partnerships in the arts and cultural heritage space that can be leveraged for the benefit of the region	The number of relationships developed and the benefit they deliver to the region	One strategic relationship secured per year with the benefit delivered assessed on a per-partnership basis

F) DIGITAL EXCELLENCE

For the High Country to set industry best practice for the use of digital technologies across all aspects of the region's offering, delivering a superior consumer experience that differentiates it from competitors.

Overview

The High Country aspires to achieve digital excellence, setting industry best practice for the use of digital technologies in all aspects of the region's tourism offering. It is envisaged that these efforts will ensure that the High Country delivers a superior visitor experience that differentiates it from competitors, and drives strong outcomes to the visitor economy.

While the advantages of digital leadership and the demand from the consumer perspective is clear, the High Country is limited in its ability to meet these expectations. Regional internet coverage is inconsistent, inhibiting communications and business operations, while the poor digital skill-set and online presence of a large proportion of the tourism industry is limiting tourism growth.

Against this backdrop, digital disruption continues at a significant pace. The sharing economy is moving from strength to strength, OTAs are growing their sales channel monopoly, and social media is influencing brand equity and corporate identity like never before.

Significant strategic intervention is required to maintain market relevance, and position the region to progress in the digital space.

Regional Trends, Challenges and Considerations

High Country Digital Divide

According to the Australian Digital Inclusion Index[30], the Northern Victorian region (which encompasses the High Country) has the lowest level of digital inclusion in Victoria, sitting 10 points below the national average and 13.1 points below Melbourne. This is reflective of the region having the lowest index ranking in terms of: ability including basic skills, attitudes and internet activities; affordability and value for expenditure; and access, relative to the internet, internet technology and data allowance. This digital divide is particularly evident in the tourism industry.

Limited Online Booking Availability

Across the High Country's tourism operators, approximately 40% have little to no online presence. Of those that are online, their ability to convert consumer interest to bookings is often limited. For instance, 63% of tour/hire business are not online bookable, and 29% of accommodation businesses offer phone or a booking-form as their primary booking method. These figures demonstrate the High Country's tourism industry is completely out of step with current consumer expectations and demands, who want to both research and book their travel experiences online, in real-time.

Limited Digital Marketing Capacity

The quality of operator websites is often poor, and the level of confidence in the digital marketing/social media space is relatively low. Indeed, research conducted in the agritourism space identified a lack of marketing knowledge being a key inhibitor to tourism business growth. Building digital marketing skill-set will be important in optimising business opportunities for the region and enabling operators to effectively build a presence in domestic and international markets.

Destination Website Management

Since the last three-year strategy, the Regional Digital Platform (RDP) has been migrated from a proprietary to Open Source system that has delivered a range of benefits in terms of functionality, security, cost-effectiveness and growth. In turn, this has improved the manageability of the destination websites supported by the RDP and delivered a new range of site benefits to users. While TNE hosts and provides technical support for these websites, the sites themselves are managed by LGA/RMB partners, some of whom lack the skill-set or resource to optimise site outcomes.

Changes in the Technological Interface
Speech is becoming the key interface for technological interaction in the home, which means that consumer reliance on screens and keyboards is starting to transition away. As this occurs, consumers will become increasingly reliant on the content and advice provided by these chat-bots. A recent study by Weber Shandwick[31] revealed that more than half of respondents were happy for AI to undertake tasks like offering advice on finance and health. This shift may challenge the dominance of current search engines and will introduce a new requirement for 'verbal' content to be part of the digital content mix.

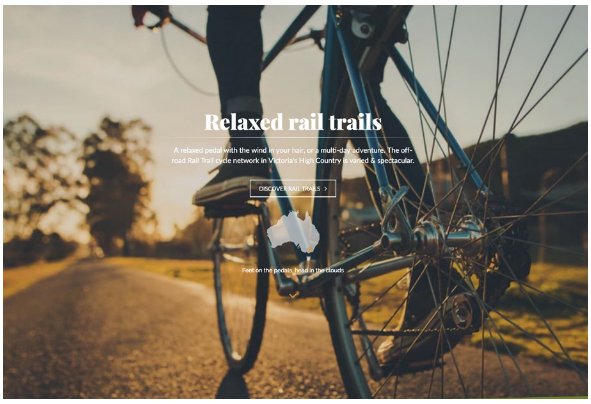
Strategic Approach

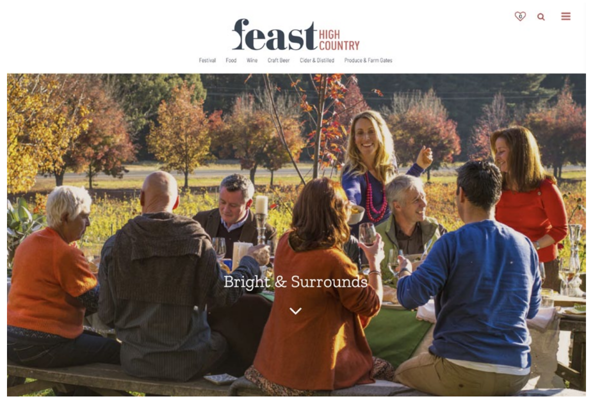
The digital divide is particularly evident within the region's tourism industry, where the current digital skill-set is very low. Most operators only have a rudimentary understanding of the digital landscape, lacking the skill-set or confidence required to engage with customers in this space, indicative of a significant skills gap. This capacity issue means that the region's digital presence and e-commerce capabilities are limited, impacting opportunities for tourism growth in both domestic and international markets.

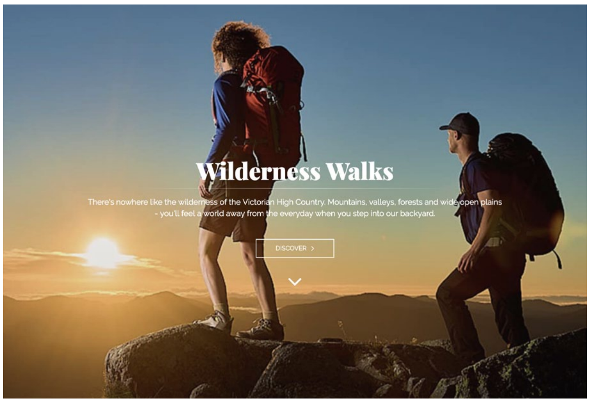
With this in mind, TNE will focus on working with industry to build their digital capacity, enabling them to optimise online opportunities for both their businesses and the broader region. TNE will also look to support the region's LGA/RMB partners in improving the digital offering for their respective destinations, both through building their internal digital capacity and active involvement in site management and growth.

Optimising digital outcomes for the High Country will also result from the implementation and enhancement of engaging, functional and targeted regional digital assets. This includes optimising key pillar website and social channels, but also developing new collaborative digital solutions that address regional issues and opportunities through a consumer-centric lens.

TNE will also work with regional partners, particularly the Ovens Murray Regional Partnership, to advocate for infrastructure improvements to support effective digital operations across the High Country.







Three Year Strategic Focus

Objective	Strategy	KPI	Target
For the High Country to set industry best practice for the use of digital technologies across all aspects of the region's offering, delivering a superior consumer experience that differentiates it from competitors	Build industry and stakeholder knowledge and skill-set to optimise digital outcomes for the region	The number of businesses/ stakeholders engaged via digitally focused development sessions The amount of online bookable operator product	40 businesses/ stakeholders engaged via individual or group digital sessions per year 10% growth in online bookable product across the regional tourism product over the life plan
	Raise the regional digital presence through working with LGA/RMB partners to optimise destination-specific digital channels	Positive growth against key site metrics associated with TNE intervention	Target to be set annually in accordance with initiative and budget
	Establish and grow strong pillar brand websites that drive awareness and attract strong visitation	YOY session and engagement growth across pillar sites	Annual pillar site targets to be determined based on YOY performance and campaign budget
	Manage engaging pillar-based social media platforms that inspire and motivate visitors	Best practice engagement metrics based on Facebook and Instagram algorithms	Brand advocacy and fan acquisition targets established for all social accounts annually
	Develop digital solutions – either independently or in conjunction with specific industry/stakeholder groups – that improve how visitors research, book and experiences the High Country offering	The number of solutions implemented and the benefits they deliver	Two solutions implemented over the life of the plan with benefits assessed on a project-by-project basis
	Enhance and extend the functionality of the regional digital platform to meet changing consumer and technological requirements	The level of new or enhanced functionality implemented on the platform and the benefits they deliver	One major enhancement implemented per year, supported by a suite of smaller enhancements as agreed to with RDP partners

G) ORGANISATIONAL GROWTH

Maintain a strong organisation that proactively leads regional tourism efforts and delivers positive outcomes for the High Country.

Overview

TNE is a strategic, innovative and well-respected organisation that provides strong tourism leadership for the region. Operating across a complex and diverse group of stakeholders, TNE has a reputation for delivery and collaboration, optimising outcomes for the High Country visitor economy. TNE is also a robust organisation that enjoys strong support from its funding partners, and is well resourced to deliver a range of both supply and demand side tourism initiatives.

However, ongoing focus and strategic growth is required to ensure TNE remains effective and able to lead regional tourism efforts effectively. Similarly, the region is only as strong as the industry it encompasses, so TNE must also ensure the ongoing sustainability and growth of tourism operators.

Regional Trends, Challenges and Considerations

Visit Victoria

At the start of the 2016/17 financial year, Visit Victoria was established, uniting Tourism Victoria, Victorian Major Events Company and Melbourne Convention Bureau under the one company and brand. Following a period of considerable change, Visit Victoria is moving with strategic purpose to reach its 2025 target of a State visitor economy worth $36.5 billion in terms of visitor spend. Working closely with Visit Victoria will enable the High Country to optimise its own supply and demand side tourism efforts, and access markets and opportunities that it could not realise independently.

RTB Review

At the commencement of this strategy, the tourism landscape is experiencing significant change. The November 2018 State elections resulted in the appointment of a new Tourism Minister (albeit under the same Government) and Visit Victoria is reviewing the structure of the Regional Tourism Boards within the context of current funding arrangements. With change comes challenges but also new opportunities for growth and diversity, which TNE welcomes.

Impacts of Rate Capping

Rate capping continues to impact the scope of LGAs, some of which face a growing tourism scope with dwindling resources and budget. Under such a scenario, cooperative investment in shared tourism services delivered by TNE is strategically sound, with the organisation being well positioned to supplement LGA economic development efforts with its own sizeable team. However, TNE recognises the need for it to provide consistent and sustained value to its LGA partners to secure ongoing investment in regional initiatives versus destination-specific priorities.

Workforce Acquisition and Retention Issues

The High Country faces a growing workforce issue as tourism businesses struggle to attract and retain quality tourism staff. As a result, operators face a difficult task maintaining and growing their businesses due to: an inability to spend adequate or necessary time on business development; operator fatigue resulting from covering roles that cannot be filled; and reduced investment because businesses are reluctant to grow if they cannot manage staffing for additional services and products. From a consumer perspective, staffing issues impact the level of service and visitor experience provided which also brings reputational risk for the individual business and the region as a whole. This issue is further exacerbated by the seasonal nature of much of the regional tourism offering, limited availability of staff housing and poor transport options.

Operator Viability

The High Country is currently enjoying a period of sustained and significant tourism growth. While some businesses are thriving, others are still struggling to achieve viability. Changing consumer demands, growing digital disruption, increased competition and limited investment capability represents significant challenges to a number of businesses.

Strategic Approach

TNE will focus on maintaining the strong, nimble and innovative nature of the organisation so that it is able to effectively navigate the fast-changing tourism landscape. It will do this by ensuring that the organisation is financially stable, minimises risks that have the potential to impact organisational success, and through implementing strategies aimed at maintaining a productive team.

TNE will work with its partners to ensure that it is effectively meeting their tourism needs and continues to add value to their own tourism efforts. This will maximise the impact of collaborative initiatives, drive strong outcomes for the regional economy and ensure support for TNE's strategic tourism efforts. In line with this, TNE will foster greater understanding of its strategic efforts through proactively communicating with stakeholders about its role, the programs it delivers and its achievements.

Looking outward, it is essential that TNE maintains strong relationships with State and national tourism entities and supporting organisations. This will enable TNE to actively influence broader strategic efforts that impact the High Country, and also position it best leverage tourism opportunities that amplify regional efforts. Maintaining a strong and proactive presence in key areas of the tourism industry will also deliver better outcomes for TNE should RTB structural change occur within the term of this strategy.

Strengthening the High Country tourism industry will remain a key focus for TNE. While most activities with industry are defined within this strategy in conjunction with specific pillars, there are a range of industry initiatives that TNE will deliver that apply to all product pillars. This includes working with the accommodation sector – which underpins the entire regional offering - to improve its current product but also attract new experiences to the region, particularly in areas where there are known accommodation deficits. It also involves taking a strategic lead in addressing common problems across the region, whether that be workforce issues, proactively leveraging the sharing economy or taking collective action to remove emerging tourism barriers.

Taking a long-term view for international market growth, driving regional and product awareness through cross-pillar PR activities and supporting the region in times of crisis are also all areas where TNE is well positioned to drive collaborative efforts.

Three Year Strategic Focus

Objective	Strategy	KPI	Target
Maintain a strong organisation that proactively leads regional tourism efforts and delivers positive outcomes for the High Country	Maintain the financial stability of the organisation to ensure it can continue to lead regional tourism efforts	Net profit as reflected in the quarterly P&L report	Maintain a positive net profit position and a healthy reserve
	Maintain a happy, safe and productive team capable of driving regional tourism efforts	Level of satisfaction with TNE as an employer	Overall staff satisfaction level with TNE as an employer to be rated 8 or above.
	Manage organisational risk by mitigating any threats posed to TNE or its tourism activities	Maintenance of a risk register	Risk register updated quarterly
	Review organisational performance to ensure that it is fit for purpose and meets the needs of stakeholders	Level of stakeholder satisfaction with TNE performance as gauged via annual stakeholder feedback survey	Maintain a primarily 'highly satisfied' rating relative to overall satisfaction with company performance; and drive YOY improvements against other key performance components

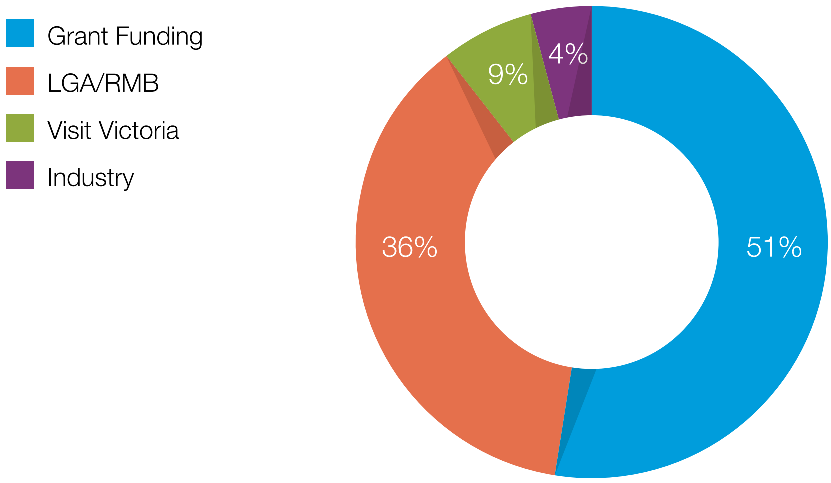
Three Year Strategic Focus

Objective	Strategy	KPI	Target
Maintain a strong organisation that proactively leads regional tourism efforts and delivers positive outcomes for the High Country	Actively engage stakeholders regarding TNE initiatives/ efforts to ensure the role and deliverables of the organisation are understood and valued	The implementation of a communication and engagement plan	Plan to be implemented annually and to deliver positive relationship/ perception outcomes for TNE
	Leverage the tourism efforts of Visit Victoria and other peak entities to generate strategic outcomes for the High Country	The number of broader initiatives leveraged each year	One significant initiative each year (subject to the availability of relevant external opportunities)
	Actively engage with regional, State and national tourism organisations to progress the tourism industry	The number of major tourism organisations engaged with and the benefits they deliver to the region	Active and regular engagement with all key tourism bodies
	Lead projects that identify and look to resolve common regional tourism business barriers	The delivery of strategic projects that address regional barriers	Two projects delivered over the life of the plan
	Ensure that the region is prepared to deal with crisis	The maintenance of a crisis communications strategy that is fit for purpose and active participation in regional emergency planning	Crisis communications strategy reviewed and updated annually; and involvement in applicable regional planning/response activities
	Work with industry to improve and diversify the standard and type of accommodation offered across the region	The number of businesses engaged via individual/group development sessions or accommodation specific initiatives	30 accommodation providers engaged for this purpose per year
	Work with industry and stakeholders to implement the recommendations of the High Country's International Tourism Strategy	Successful implementation of the International Tourism Strategy	Implementation of short term recommendations identified in the Strategy by the end of this plan
	Support industry through effective PR campaigns that drive cross pillar promotion among relevant markets	The number of media clips secured each year	10% YOY growth in the number of clips secured

13. BUDGET

TNE's budget consists of operational and activity funding contributions from Visit Victoria, local government partners (councils and resort management boards) and industry. TNE also commits significant resource to leveraging local spend to secure State and Federal grant funding.

TNE Revenue Sources



TNE's budget is largely determined on an annual basis, subject to available partner funding and grant opportunities. Over the life of this plan, TNE will look to optimise potential funding opportunities and visitor economy outcomes through continuing to deliver integrated tourism strategies that: are reflective of the region's five product pillars; of relevance to funding partners and industry; and capitalise on State and Federal tourism focus areas. TNE will also consider where there are opportunities to partner with other entities, both within and outside of the tourism space, to deliver joint projects that maximise investment.

Program expenditure will be determined on an annual basis, reflective of the level of revenue derived from key funding sources. This expenditure will be noted in TNE's annual Business Plan, submitted to the TNE Board for review and approval by May each year.

14. MEASUREMENT AND CONTROL

While this three-year Strategy defines the overarching direction of TNE's demand and supply side tourism activities, an annual Business Plan will identify the initiatives required to deliver on the KPIs outlined in this document.

The Business Plan will be reviewed on a quarterly basis and reported to the TNE Board. This quarterly review of the Business Plan will ensure that key strategic areas are progressing as planned, and also allow for strategic intervention if required to optimise plan outcomes.

At the close of each financial year, TNE will develop a report that considers the deliverables of both the annual plan and three-year strategy, and note key learnings that will influence the development of the coming Business Plan to ensure long-term organisational and regional objectives are met.

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