



# VICTORIA'S HIGH COUNTRY

## DESTINATION MANAGEMENT PLAN 2013–2023

Prepared by Tourism North East  
Updated March 2016

**TOURISM**  
**NORTH**  
**EAST**





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# EXECUTIVE SUMMARY

## OVERVIEW

Tourism North East (TNE) is the regional tourism board that represents 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 and Mt Hotham.

TNE is charged with developing the long-term strategic vision and direction for the High Country, which includes the development of a Destination Management Plan that looks to identify regional project priorities over the coming decade.

While Victoria’s High Country Destination Management Plan 2013–2023 was originally launched in 2013, a review of the document has been conducted in 2016 in recognition of a number of key changes in the local tourism landscape. The 2016 review has allowed for a finessing of the 2013 document, with the region’s efforts focused on the priority projects best positioned to leverage collaborative efforts and deliver positive tourism results for the High Country.

## REGIONAL PERFORMANCE AND FOCUS

The High Country currently attracts over 3 million visitors who spend \$692 million when in-region. As such, tourism accounts for 20.3% of gross regional product and employs 7,900 people (20.2% of regional employment). This plan looks to generate further growth within the region’s visitor economy by leveraging its key product strengths: cycle tourism, food, wine and beer, snow, nature-based activities, and arts and culture. It will use engaging tourism experiences associated with these product pillars to attract increasing numbers of Lifestyle Leaders to the region, which is a large and high yielding customer segment. In terms of target markets, this Plan focuses on the region’s core intrastate market, supported by efforts in the interstate and international space.

While the Australian tourism landscape is currently impacted by a range of external factors like economic and technology trends, changing demographics and evolving holiday preferences, the region is in a good position to work collectively to improve economic outcomes associated with the tourism offering.

## DESTINATION MANAGEMENT PLAN – OBJECTIVES AND REGIONAL PRIORITIES

The Destination Management Plan looks to deliver on several key objectives over its lifespan. The overarching regional objective is to increase total visitation by 15% based on the rolling five-year average. It also aims to increase the percentage of domestic and international overnight visitors, and grow average spend across all markets. Achieving these objectives will, on average, generate an additional estimated \$295 million per annum into the regional economy by 2023.

The realisation of these ambitious objectives will be reflective of the tourism efforts of the entire region, and will require significant investment in tourism infrastructure, marketing and product development if they are to be achieved. To this effect, the Destination Management Plan process has been used to identify a limited number of priority tourism projects for the region that have the potential to deliver the strongest collaborative outcomes, focusing on eight key projects:

### Priority Project 1: Ride High Country – Rail Trails

The High Country features three iconic rail trails that will be collectively recognised as the best rail trail network in the Southern Hemisphere, acting as a major regional tourism driver. This position will be achieved through enhancing current trails with new and engaging trail installations, and by delivering rail trail extensions and upgrades to complete existing networks. This infrastructure will be supported through the development of new bike hubs that cater for the specific needs of cycle tourists, along with facilitated rail trail experiences and transport options. This project also entails the development of a regional ‘Ride High Country’ bike brand that is used to unite and promote the entire bike offering. Taken to market via a dedicated rail-trail campaign, this brand will be key in driving consumer awareness and bike product uptake.

### Priority Project 2: Ride High Country – Mountain Bikes

The High Country will build on its strong mountain bike credentials to become the Australasian mountain bike destination of choice. This position will be achieved through the development of new mountain bike trails and ride experiences to fill existing gaps, and the improvement and extension of existing trails to establish a world-class regional bike park. Complementing the rail trail project, this offering also requires bike-specific hubs, new transport options and multi-destinational experiences. The mountain bike product will be promoted under the overarching Ride High Country brand, with market exposure enhanced through the securing of high-profile events. The two Ride High Country projects (priority project 1 and 2) will enable the High Country to achieve an ownership position in the Victorian cycle tourism space.

### Priority Project 3: Food, Wine and Beer Industry Innovation

The food, wine and beer market is changing rapidly, so it is essential that the High Country offering continues to evolve and innovate in order to meet consumer demand. This project looks to drive innovation across the region’s key food, wine and beer tourism offering to ensure that it is engaging, contemporary and experiential, and appealing to the Lifestyle Leader market. As such, this is largely a product development project, that may result in the implementation of associated infrastructure, and will need committed marketing and promotion to capture a leadership position in this space.

### Priority Project 4: Alpine Snow Growth

The three major alpine resorts – Falls Creek, Mt Buller and Mt Hotham – offer a snow product that acts as a major tourism and economic driver for the region. As such, it is essential to evolve the winter offering of the resorts to ensure they continue to appeal to the visitor market and drive visitation, yield and job opportunities throughout the High Country. This will be achieved through investment in new infrastructure that will improve the customer experience, diversify the resort activity offering, grow the current capacity of the resorts, and enhance access to and around the villages. This approach will see infrastructure investment complemented by the attraction of new businesses who have the capacity to offer additional resort activities that appeal to their broad customer base.

### Priority Project 5: Alpine Resort Green Season Activation

While the High Country offers a broad range of nature-based tourism experiences, it does not have any true iconic products in this space (outside of the snow season). This project aims to leverage the existing green season (non-winter) strengths of the alpine resorts to establish them as attractive nature-based tourism destinations that act as visitation and yield drawcards for the entire region. This project features significant infrastructure and planning projects at all of the resorts including the Falls to Hotham Alpine Crossing and Mount Buffalo Destination Master Plan. These initiatives will be supported through the development of products associated with experiences that are common across the resorts (like trail running and walking) and can become collective regional strengths, promoted via cooperative campaigns.

**Priority Project 6:  
Inland Waterway Hubs**

This project looks to establish attractive nature-based tourism offerings associated with key regional waterways that have the potential to be future tourism drivers. This includes the development of Lake Eildon's boating facilities and the Tallangatta Holiday Park Redevelopment, supported by efforts to attract businesses capable of developing products that activate key waterways. Associated brand and marketing work will follow this infrastructure and product development.

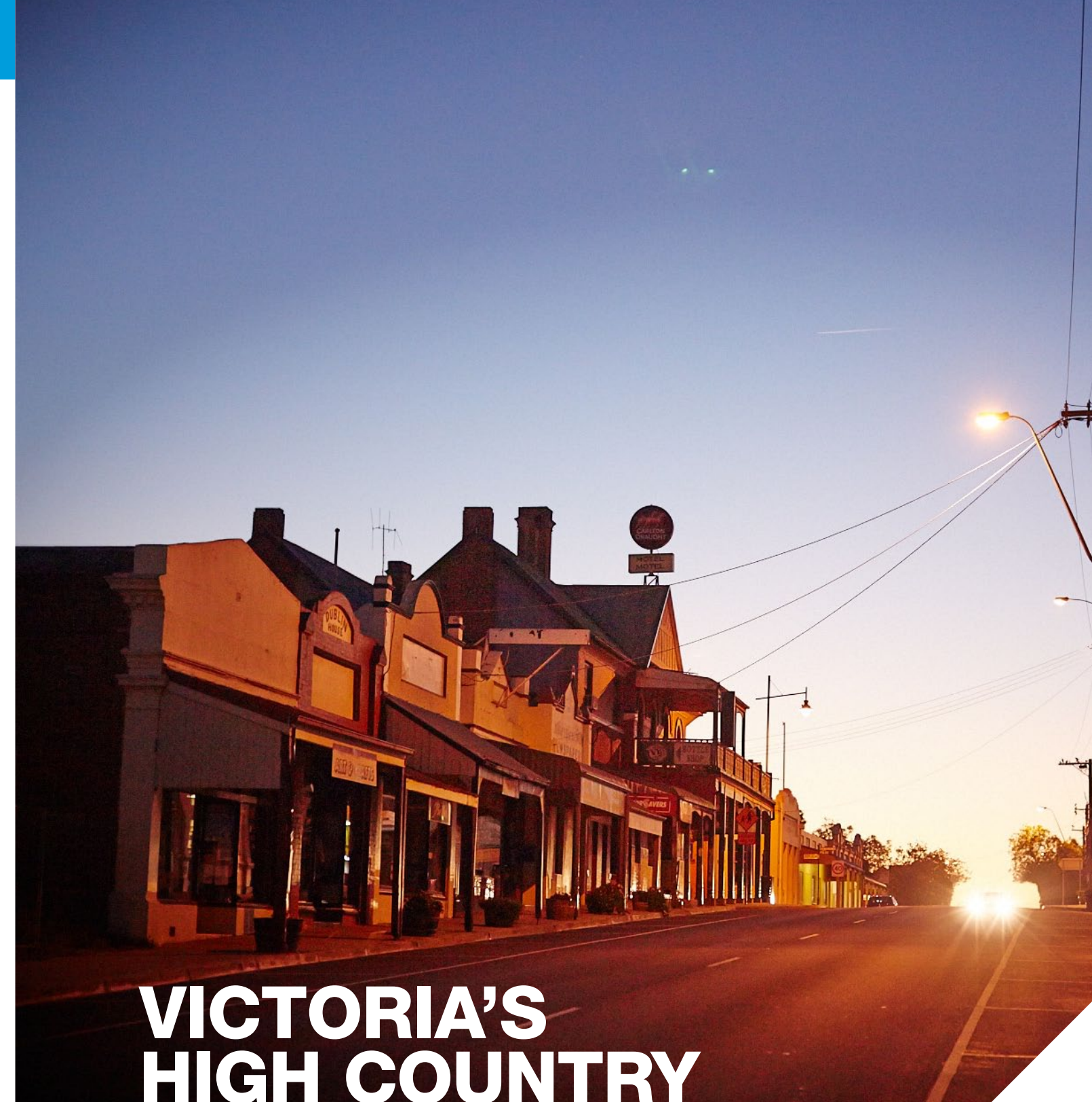
**Priority Project 7:  
Arts and Culture Invigoration**

The High Country has a rich cultural heritage but currently fails to offer the immersive and experiential products that visitors are looking for. This project aims to reinvigorate the region's arts and culture tourism experience via a modern interpretation of the product offering. This includes supporting infrastructure works like the Benalla Art Gallery Redevelopment and Winton Wetlands Connectivity Project, as well as the development of highly engaging products associated with the Ned Kelly story, the local indigenous experience, and a High Country Art Discovery product. Once developed, brand and marketing work will be required to take these products to market.

**Priority Project 8:  
Digital Excellence**

Digital technology is now an essential part of the tourism experience, so the High Country is looking to achieve excellence in this area. This project focuses on using technology to make the High Country experience easier to research, access and enjoy, driving positive tourism outcomes across the region. The project includes achieving excellence and diversification of existing channels (like the regional digital platform), as well as pioneering the use of the latest digital formats across new platforms. Any new or unique digital infrastructure will be supported via marketing.

A whole of region commitment to the support, development and promotion of these priority projects will deliver significant returns to the High Country's visitor economy.



# VICTORIA'S HIGH COUNTRY DESTINATION MANAGEMENT PLAN 2013–2023



## 1. TOURISM NORTH EAST

Tourism North East is one of eleven regional tourism boards established at the directive of Visit Victoria, the State tourism body. Tourism North East (TNE) represents the region in North East Victoria referred to 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 Hotham and Mt Buller.



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. These efforts are associated with several key areas:

- > Regional marketing – developing regional campaigns that look to drive awareness, dispersal and yield opportunities for the region.
- > 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.
- > Facilitating 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 – leading advocacy efforts across a variety of areas including funding support and legislative and policy issues.
- > Strategic planning – leading the strategic direction of the region as well as providing consultation for State and Federal plans and programs in the tourism space.

Included in TNE's scope is the development of a Destination Management Plan that looks to identify regional project priorities over the coming decade, unifying government and industry in a common development path.

## 2. DESTINATION MANAGEMENT PLAN OVERVIEW

A Destination Management Plan is developed when tourism bodies, government and industry plan for the future of a destination and focus on proactively building and managing the visitor economy.

Victoria's High Country Destination Management Plan 2013–2023 was developed to identify the strategic direction of the region with the aim of uniting marketing, investment, product development and industry development efforts to achieve strong tourism outcomes for North East Victoria.

While this Plan was originally launched in 2013, a review of the document has been conducted in 2016 in recognition of several key changes in the local tourism landscape. This includes a maturing of the relationships between TNE, its local government partners and industry, and a better understanding and support for regional versus destination specific priorities. It also reflects a shift in State and Federal Government tourism priorities, with a growing interest in the development of iconic tourism projects that have the potential to maximise return across multiple destinations and parties.

This review involved consultation with the six Councils and three Resort Management Boards captured in the High Country area. This consultation identified tourism project priorities for the High Country within the context of the opportunities, challenges and tourism environment that the region currently operates. This process also included a review of current research and factored in industry experiences garnered via TNE's ongoing industry communication and development activities.

The 2016 review has allowed for a finessing of the 2013 document, with the region's efforts focused around eight priority projects that are best positioned to leverage collaborative efforts and deliver positive tourism results for the High Country. These projects have been developed with the visitor experience in-mind, and seek to provide an infrastructure, product development and marketing framework in which to move Victoria's High Country – as a destination – forward over the coming 5 – 10 years.

This Destination Management Plan is supported by TNE's three-year Strategic Plan and the tourism, economic development and master plans of the High Country's Councils and Resort Management Boards. All of these parties are responsible for realising the priority projects and broader regional objectives contained within this Plan, and these supporting documents detail how they will do this at an individual organisational level.

## 3. TOURISM AND VICTORIA'S HIGH COUNTRY – DESTINATION PERFORMANCE

Over 3 million people visited Victoria's High Country in 2015, spending \$692 million when in-region. Tourism accounted for 20.3% of gross regional product and employed 7,900 people (20.2% of regional employment). As such, Victoria's High Country is ranked second in the comparative importance of Victoria's tourism across regions (behind Phillip Island).

The High Country's visitors are primarily from the domestic market, including 1.4 million overnight visitors and 1.6 million day visitors. This market is currently also the most lucrative, with overnight visitors contributing \$548 million to the local economy and day visitors generating \$131 million.

In 2015, domestic day visitors to the region were up 5.2% from the previous year, accounting for 5.4% of all domestic daytrips to regional Victoria. The High Country's domestic overnight visitors were up 9.5% from 2014, accounting for 10.2% of all domestic overnight visitors to regional Victoria and 9.7% of domestic visitor nights.

The region also attracted over 24,000 international overnight visitors in 2015, who generated a further \$13 million in local spend. International overnight visitation to the High Country was up 17.6% compared to the previous year, and accounted for 5.3% of all international overnight visitors to regional Victoria.

Analysis of visitation trends over the past nine years shows that domestic visitation has experienced slow but steady growth, while international visitation has remained fairly static.

In terms of visitor satisfaction, 68% of people who visit the region would recommend it as a holiday destination to others, ensuring that visitor satisfaction levels are significantly above industry benchmarks. This result is the fourth highest of 66 studies recorded by the benchmarking agency. The destination performs equally well among repeat and first time visitors.

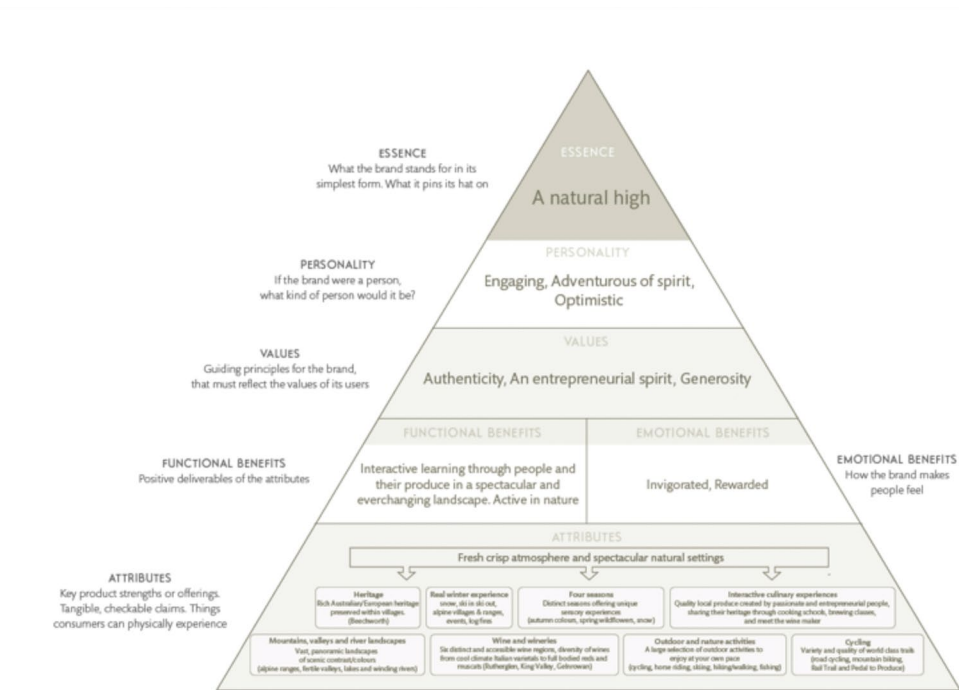


#### 4. HIGH COUNTRY BRAND

“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 High Country brand essence

Visit Victoria has developed clear and differentiated brands for each of the State’s key 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 following brand pyramid<sup>1</sup> represents the sum of the brand’s parts:



Brand research conducted by Visit Victoria shows Victoria’s High Country has the second strongest regional unprompted awareness in Victoria (13.3%) with Bright, Mansfield, Beechworth and the alpine resorts currently driving this awareness, along with key attribute associations of alpine adventure and snow.

Brand and perception research commissioned by TNE<sup>2</sup> also found that people’s immediate associations and imagery of the High Country tend to relate to the alpine areas, however the diverse nature of the region – with its mountains, National Parks, wine-producing areas and waterways – is also a key contributor to the imagery of the North East. The research 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 commented 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 towns. The common thread throughout the qualitative findings was 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.

#### 5. REGIONAL PRODUCT PILLARS

The High Country is defined by its product strengths – the five product pillars that are shared across the region and unique to the local offering:

##### Cycle Tourism

Bikes are a true strength of the region, particularly associated with the disciplines of mountain biking, rail trails and road cycling, which are available throughout the High Country. A robust bike infrastructure network, supported by high-quality bike experiences that are integrated with other key product pillars, ensure that this offering delivers strong tourism benefits to the High Country. The region’s bike product is currently primed for growth, however further development of supporting bike services, central bike hubs and additional infrastructure to improve the network or fill current product gaps is required to ensure this product offering is truly world-class. The High Country also has the potential to achieve an ownership position within the Victorian bike space but must move quickly to secure this position ahead of competitors.



##### Food, wine and beer

The food, wine and beer product is mature and diverse, encompassing winery cellar doors, world-class restaurants, seasonal farm gate experiences, rich local produce, cooking schools, craft breweries 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.



##### 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 range of Village experiences and more. The snow offer is appealing among both domestic and international markets but ongoing product evolution and attraction is required to ensure that the resorts maintain their broad market appeal and future sustainability.



##### Nature-based Experiences

The North East’s unique alpine environments and rich fertile valleys make it a popular nature-based tourism destination. Visitors can participate in fishing, boating and watersport activities on rivers and inland waterways, enjoy hiking, 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. Supported tours, rich experiences, hire services and unique accommodation in sympathy with nature are now required to unite this great diversity of activities within dedicated nature-based tourism hubs.



##### Arts and Cultural Heritage

Visitors associate the High Country with culturally enriching experiences that draw from the history and culture of the area. Aboriginal heritage, the rich gold mining history, the legend of Ned Kelly and the story of the Man from Snowy River are all iconic cultural heritage aspects of the region. The High Country also features unique artworks that capitalise on and draw inspiration from the surrounding landscapes, and a variety of museums and historic sites that celebrate these experiences. This is a product pillar that requires further development to ensure that the region delivers immersive, memorable and experiential arts and culture experiences that meet current visitor expectations.





## 6. CUSTOMER SEGMENTS

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

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

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

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

It is also worth noting that the Lifestyle Leader market is a key focus for Visit Victoria and also strongly aligns with Tourism Australia’s *International Experience Seeker* audience. As such, the region’s efforts in this space are able to leverage broader state-wide and national tourism strategies.

While Habituals are not a marketing focus for the region, as they have largely already predetermined where they will visit so there is little opportunity to influence their travel decisions, the ongoing development and revitalisation of regional products, infrastructure and services is essential to ensure the segment’s ongoing satisfaction and commitment to the High Country.



## 7. TARGET MARKETS

In the year ending Dec 2015, 99% of visitors to the High Country were from the domestic market. Of this market, 53% visited just for the day, spending an average of \$81 per trip. Those who stayed overnight (47%) stayed for an average of 2.8 nights – generating a total of 3.9 million visitor nights – and spent \$141 per night when in-region.

Of the domestic overnight market, 81% were from intrastate with majority being from Melbourne (51%) and the remainder being from regional Victoria. In terms of the interstate market (19% of domestic overnights) NSW was the largest source market.

During the same period, international overnight visitors accounted for 1% of the High Country’s visitor market and generated 365,000 visitor nights. The UK was the region’s largest source market for visitors (29%) followed by New Zealand (13.8%) and Germany (7.8%).

Across all of these markets, the holiday and leisure segment was the primary driver, with an average of 61% of visitors travelling for this purpose, followed by the visiting friends and relatives (VFR) market (24%).

As such, the focus of the region’s marketing efforts is the intrastate market, primarily targeting Melbourne followed by regional Victoria, as it is the largest and most valuable in terms of visitor spend. This approach also places the High Country 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 yielding markets.

From an international perspective, TNE will work with businesses across all of its product pillars to ensure products are developed that meet the needs of international customers, and continue to leverage Visit Victoria and Tourism Australia’s own efforts and considerable budgets in key international markets. TNE will also look at how it can capitalise on the strong VFR market to target international visitors.





## 8. TRENDS IMPACTING THE AUSTRALIAN TOURISM SPACE

Several key macro and micro trends are expected to impact the Australian tourism landscape, and therefore effect the outcomes of this Destination Management Plan over coming years:

### Economic Outlook

In recent years the Global Financial Crisis impacted both tourism spending and travel trends. However, according to Tourism Research Australia,<sup>3</sup> the global economy continues to recover from this period with ongoing growth forecast. While economic growth is strongest among emerging economies, advanced economies are also slowly strengthening, providing a positive economic backdrop for international visitors in the near future.

The Australian economy continues to grow (although below trend), assisted by lower fuel prices, low interest rates and the decline of the Australian dollar against a number of lead trading currencies. Lower interest rates mean that many households now have more money to spend on discretionary items including travel.

At the same time, the drop in the Australian dollar has made inbound tourism more attractive and has made it more expensive for Australians to travel overseas. This is expected to result in growth in both inbound and domestic travel, going some way to mitigate the impact of outbound travel of Australian residents.

### Australian Tourism

Tourism Research Australia predicts that domestic visitor nights will increase by 3.3% in 2015–16 and 3.7% in 2016–17 to 336 million nights. The 10-year average growth rate is forecast at 2.8%, with visitor nights expected to reach 413 million by 2024–25. Similar growth is forecast for domestic day trips for the next few years and into the future.

While domestic tourism will positively grow, the highest level of growth will be experienced in the inbound tourism market. Inbound visitors are forecast to increase by 5.9% in 2015–16 and a further 5.6% in 2016–17 to 7.9 million arrivals. The 10-year average growth rate is forecast at 4.1%, with arrivals expected to reach 10.6 million by 2024–25. Growth in arrivals from emerging markets like China, India and Malaysia are expected to outpace the global average growth rate, as is growth among leading western tourism markets like the US, UK and New Zealand. China is expected to be the largest source of growth in both inbound arrivals and inbound expenditure.

After strong growth in outbound travel over the last 10 years, driven by low-priced, easily accessible holidays offering the allure of an international experience, Australian resident departures slowed considerably in 2014–15. However, modest growth is forecast for the next 2 years (3.2% and 3.5% respectively) and the 10-year average growth rate after that is forecast at 3.3%, reaching 12.8 million departures by 2024-25; less than previously forecast.

### Tourism Technology

Technology has changed the way people research, book and interpret their holiday experience, and will continue to evolve over the life of this Plan. The digital space is a rapidly changing environment, requiring up to date technology understanding, constant investment in technology enhancements and the resource to generate and distribute great content. Handled correctly the digital space has a significant part to play in the way tourism operators grow their businesses and maintain clients, and for destinations and regions to attract new visitors.

This includes consideration for the changing visitor information environment, with traditional information centres experiencing declining visitation, necessitating a change to servicing models. This has also been matched by the increased prevalence and strength of online information sources and new booking platforms, in particular, the rise of online travel agents, which has led to increased digital disruption amongst traditional sales channels.

Social media is becoming more influential than ever, impacting where people travel, what they do and what they recommend, with 24% of people who use social media researching holiday destinations or travel offers<sup>4</sup>. Social media now ensures that consumers also take an active role in the communication, relationship management and brand development process associated with destinations and their tourism offering. And now, with the introduction of new platforms like Periscope (which has 10 million users since it launched in March 2015), this influence will grow, with travellers now able to see, hear and share in other people's tourism experiences in real time.

### Climate Change

For destinations like the High Country, with a tourism product that is dependent on the strength and diversity of its natural environment, climate change poses a real and significant threat. An increased occurrence of bushfires, issues with water supply and management (including problems like blue-green algae), and environmental degradation are common occurrences impacting the tourism landscape and its ongoing sustainability. In particular, rising temperatures and erratic weather conditions are already effecting the snow resorts, with research conducted by the CSIRO and the Bureau of Meteorology<sup>5</sup> determining that the Victorian snow seasons are becoming increasingly impacted by greenhouse gas emissions, with future seasons likely to start later, finish earlier and decrease in length anywhere between 5-35 days by 2020.

### The Sharing Economy

Linked to growth in digital platforms and social media is the rise of the 'sharing economy' – online platforms that connect buyers and sellers, where people can borrow or rent assets owned by someone else, usually at a lower price than purchasing through standard channels. In Australia, the sharing economy has grown in the accommodation and transport sectors with the proliferation of businesses like Airbnb and Uber. It is changing the way people travel by providing them with new holiday options, but will also change the competitive landscape of the tourism industry with the introduction of new, often unregistered businesses.

### Changing Demographics

Changing demographics and household structures represents both a challenge and an opportunity:

- > Birth rates continue to drop but life expectancy increases, leading to an aging population, with over 65s expected to account for 19% of the Australian population by 2020. This will effect who is travelling and the nature of the tourism experience required.
- > The increase in double income households often provides higher disposable income; however this is regularly offset by greater financial pressure from higher house prices and family care services, and work commitments can lead to stockpiling of annual leave.
- > People are remaining as single and double income earners with no kids (SINKS and DINKS) for longer. Many people are delaying having families and family sizes are shrinking, again impacting the demographic of the traveller.
- > Generation Y has grown up taking international holidays and continues this pattern into adulthood. Traditional domestic holidays, at the beach or visiting friends and relatives are increasingly rare.
- > With almost one quarter of the population born overseas, holiday times are often reserved for visiting relatives. The flow on of this is the growth opportunities in the VFR market when overseas families visit Victorian based relatives.
- > Melbourne is Australia's fastest growing city, with 75,000 people moving there each year who have no knowledge of the tourism offering outside of Melbourne. This creates challenges in terms of destination awareness but also defines a market with great potential.

### Changing Holiday Preferences

A range of changing holiday preferences ensures that visitors are now looking for different holiday experiences and package options:

- > A shift from the social media fuelled 'fear of missing out' (FOMO) to the converse 'joy of missing out' (JOMO) represents a change from trying to include as many things as possible in a holiday experience, to slowing down, unplugging from social media and living in the moment. Closely aligned to this is a desire for holidays offering digital detox.
- > An increase in multigenerational travel, where three generations of family travel together, is a significant opportunity considering the potential size of the travel party.
- > The growing Millennials market (those following Generation X) means that holiday destinations and tourism businesses now need to consider the needs of the youth market. Already accounting for 20% of the world's tourists, this group are looking for unique and authentic experiences and opportunities to learn something new, and are guided by recommendations from friends.
- > According to trend analyst Future Laboratory<sup>6</sup>, consumers are now aspiring to be the best they can be as individuals, leading to a growing demand for product customisation and tourism experiences that support their personal transformation.



## 9. REGIONAL OBJECTIVES

Within this tourism landscape, Victoria's High Country will look to deliver on several key objectives associated with driving positive tourism outcomes for the region.

By 2023, the end of this plan, the High Country will look to increase total visitation by 15% based on the 5 year rolling average, starting from the 2015 visitation average of 2,767,100 annual visitors. Rolling averages are used in this instance as they allow for natural fluctuations within the tourism market and industry, and are therefore more effective and realistic than simply comparing two years' worth of visitation numbers.

Aside from growing the base number of visitors coming to the High Country, the region will also look to enhance the number of overnight visitors travelling to the area and extending their length of stay, along with increasing spend across all markets. Success in all of these areas will also be measured against the applicable five-year rolling averages.

This includes:

- > Growing the valuable domestic overnight market from an average of 44.3% of the total visitor market in the 2011–15 period, to an average of 55% in 2019–23 period. The region will also look to increase average overnight spend from an average of \$141 per night to \$150 in the same period.
- > Increasing the percentage of international overnight visitors from an average of 0.7% in the 2011–15 period, to 2% by 2019–23. The aim is to also bring international overnight spend more in line with domestic overnight spend with a 27% spend increase (from \$59 in 2015 to an average of \$75 in the 2019–23 period).
- > In increasing domestic overnight stays, there should be a resulting decrease in the percentage of domestic day visitors, as one type of visitor converts into another. As such, domestic day visitors should decrease from an average of 54.9% of the visitor market in the 2011–15 period to 43% in the 2019–23 period. This does not mean that less domestic day visitors will visit the High Country (in fact there should be more) just their percentage relative to international and domestic overnights. The region will also look to increase the average spend of the domestic day visitor to \$110 in the 2019–23 period.

As a result of all of these efforts, it is estimated that an average additional tourism spend of \$295 million per annum would be generated for the regional economy by 2023.

The realisation of these ambitious objectives will be reflective of the tourism efforts of the entire region including local government/resort management, industry, Visit Victoria, Parks Victoria and TNE, and will require significant investment in tourism infrastructure, marketing and product development if they are to be achieved.

Success in meeting these objectives will also be influenced by a range of variables including (but not limited to) major changes impacting domestic and international tourism trends, the ability to secure funding to drive regional priorities, and the ongoing collaborative nature of the relationships between the High Country's government and industry partners.

## 10. REGIONAL PRIORITY PROJECTS

Domestic tourism in the High Country has grown at a slow but steady pace over the past five years, and international tourism has been relatively static. If significant tourism outcomes are to be attained for the region, and the growth targets for the 2023 period realised, then considerable investment needs to be made in the development and promotion of the region's tourism offering.

With this in mind, the destination management plan process has been used to identify a limited number of priority tourism projects for the region that have the potential to deliver the strongest collaborative outcomes. This process has focussed on the identification of projects that align with the key product pillars but has also considered initiatives that underpin the pillars, like the importance of a strong digital presence.

When determining these priority projects, the follow areas have been considered:

- > A vision that provides a long-term position that the region is looking to achieve within the relevant product category.
- > An analysis of the opportunity or current market position that the project is looking to capitalise on.
- > A synopsis of the region's current and best product credentials in the space, highlighting any strengths that this plan will look to leverage.
- > The recommended strategic approach to take advantage of the opportunity, including consideration of any infrastructure investment, product development and/or marketing that may be required.
- > An outline of how the project aligns with broader regional or State priorities.

This Plan has attempted to look at projects from the view of the customer, considering what is required to deliver the best possible visitor experience, and provide increased opportunities for expenditure and regional dispersal.

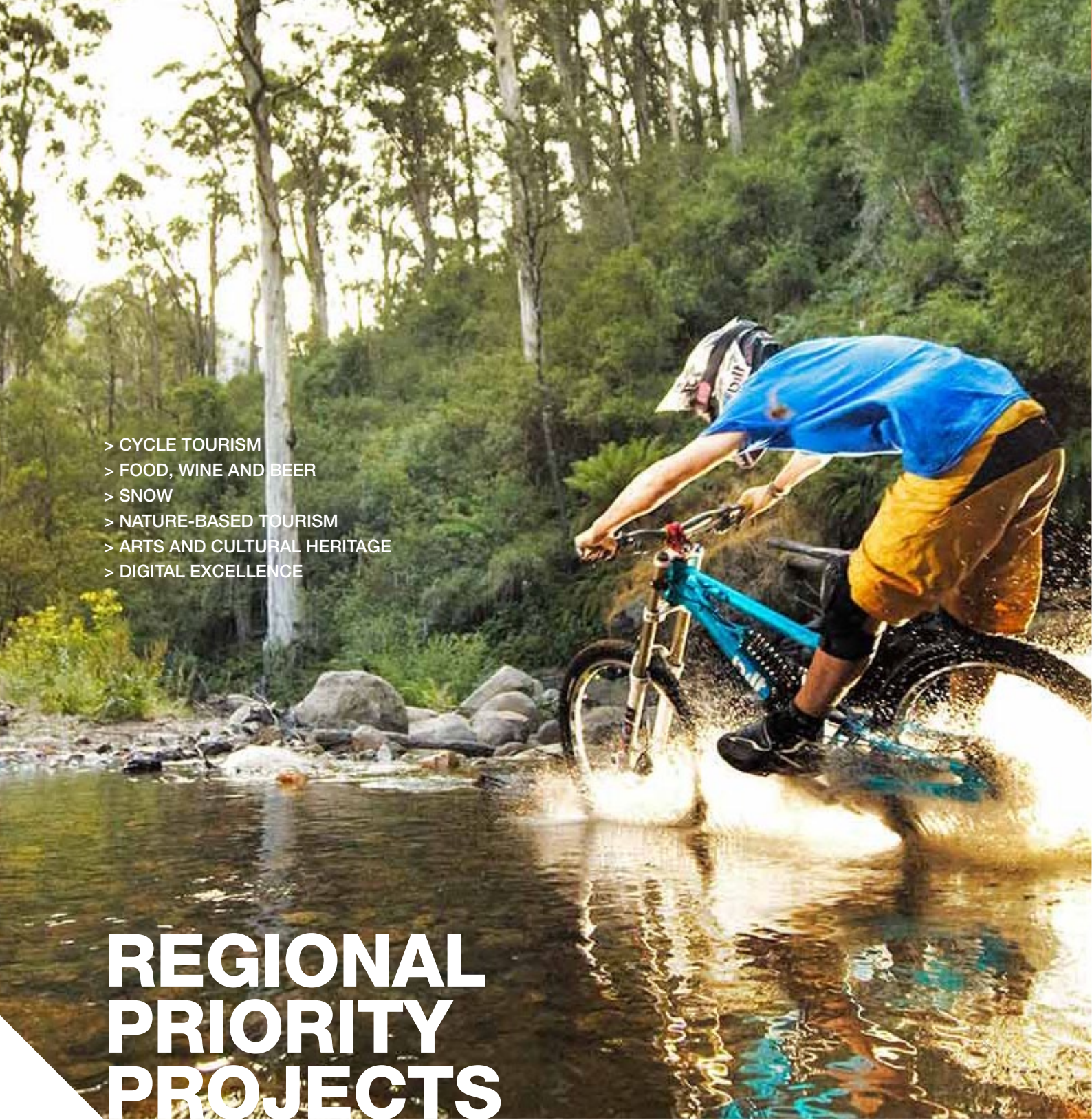
In identifying infrastructure requirements, this document has looked to support large standalone developments, as well as partner smaller infrastructure builds that together will significantly increase the offer of the region within the product category. All of these items are supported by an active proponent, although many are still at concept stage, awaiting scoping. In most cases the initial proponent is a public sector organisation who may manage the project component on an ongoing basis, or look to drive the project to a stage at which it is handed to a community group or private sector investors.

TNE works with the public sector to develop infrastructure concepts, often having active input into the development of new or improved tourist offerings. It also assists with the develop of business cases, management of associated research pieces and grant funding applications, and project advocacy.

While the infrastructure enhancements or developments are driven by the public sector, most product development is coordinated via TNE in conjunction with private entities. These efforts may result in work to secure public investment but the primary proponent is an independent business.

The marketing component is to be driven by TNE, often in conjunction with its local government partners, and in alignment with Visit Victoria and Tourism Australia. Additional funding support will be required to maximise all recommended marketing opportunities.





- > CYCLE TOURISM
- > FOOD, WINE AND BEER
- > SNOW
- > NATURE-BASED TOURISM
- > ARTS AND CULTURAL HERITAGE
- > DIGITAL EXCELLENCE

# REGIONAL PRIORITY PROJECTS

## CYCLE TOURISM

Vision: For the High Country to own cycle tourism and be recognised as the premier bike destination in Victoria.

### The Opportunity

Nearly 4 million Australians ride a bicycle each week, with 86% of them doing so for recreational purposes<sup>7</sup>. The Australian Bureau of Statistics has also determined that cycling/bmxing (which includes mountain biking) is ranked as the fourth most popular activity that Australian's participate in. The size of the Australian bike market alone points to the potential of cycle tourism – presenting riders with new destinations to undertake their chosen leisure activity.

Effectively capturing this market presents a significant opportunity for regional destinations. That is, recent research conducted by Visit Victoria<sup>8</sup> determined that cycle tourists are highly engaged, often travel to regional areas to ride, and participate in a range of activities when in-region, making them a valuable visitor market. However, this research also found that awareness of cycle tourism was low, with 34% of respondents unable to identify which state in Australia was best for a cycling holiday. Of those who could identify a state, Victoria held the strongest credentials and was also identified as the destination most considered for future cycle tourism travel. Within this awareness vacuum, opportunity exists for a destination to become known for cycle tourism, effectively achieving an ownership position within the category by leveraging existing knowledge of Victoria's bike offering.

Visit Victoria's findings are also consistent with the North East Victoria Gap Analysis commissioned by TNE<sup>9</sup> that showed that awareness of the region's signature rail trails was low. Amongst the Lifestyle Leader target segment, 78% were unaware of the rail trail but 74% were likely to visit and use the trails once made aware of them. High level modelling delivered as part of this research showed that a 10% increase in recreational cycling visitation would generate \$28.9 million in regional output, while a 50% increase would generate \$39.4 million, presenting significant opportunities for tourism growth.

The Gap Analysis also identified that there is an unmet demand for bike transport solutions, hire options, facilitated tours and guiding. While the private sector has proactively moved to fill this gap, there are still issues associated with product consistency, accessibility and promotion, ensuring there are many opportunities to both improve the current offering and build new product to meet and grow bike demand.



### Current Product Credentials

The High Country boasts a plethora of high-quality bike experiences, with particular strengths in the mountain biking, rail trail and road cycling space, so is well positioned to assume ownership within this space.

In terms of rail trails, the North East features three iconic products – the Murray to Mountains Rail Trail, High Country Rail Trail and Great Victorian Rail Trail (the longest continuous rail trail in Australia - more than 200kms). These trails encompass six local government areas within the High Country and traverse some of Australia's most unique and spectacular landscapes including hidden valleys, inland waterways, mountain ranges, verdant farmland and natural forests.

The High Country's mountain bike credentials are similarly strong, featuring over 240km of mountain bike trails that offer a true breadth and diversity of experience, from beginner trails to advanced (double black). This includes the world-class bike park at Mt Buller that features the only International Mountain Bicycling Association epic trail in the Southern Hemisphere (the Australian Alpine Epic), new purpose built trails at Falls Creek, and dedicated and spectacular trail networks at Bright, Beechworth and Mount Beauty. The strength of the mountain bike offering in the High Country ensures that it frequently hosts national series and large-scale mountain bike events.

Rounding off the bike experience in the High Country is the challenging and varied road cycling product, with the ascents into the alpine resorts recognised as being the best and most difficult climbs within Australia, and the valley rides noted as a favourite amongst avid cyclists.



### Strategic Approach

While the High Country already has a strong bike offering, significant areas of trail improvements and additions are required to ensure the region's product is considered world-class. This includes the linking, enhancement and optimisation of existing trails, and the development of new trails that both fill current product gaps and continue to evolve the offering to meet visitor needs.

Facilitating access to these trails and activating them through high-quality, multi-destinational facilitated product is also key in attracting visitors to the region to experience the bike offering. As such, development is required to both diversify current businesses and attract new operators to the region that can meet customer needs and maximise yield and dispersal opportunities for the High Country.

In order to create visitation volume and maximise use of the region's trail assets, a considerable marketing effort is required. This includes the unification of the cycle tourism offering under a regional bike brand - Ride High Country - that is taken to market via campaigns specific to each of the ride disciplines.

### Strategic Alignment

*Victoria's Cycle Tourism Action Plan 2011–2015* looks to position Victoria as the country's leader in cycle tourism, with the High Country acknowledged as having the strongest cycle tourism credentials in the State. Similarly, *Victoria's Nature-based Tourism Strategy 2008–12* identifies the vision for Victoria to become the premier State for mountain biking. *Victoria's Regional Tourism Strategy 2013–16* also states the need to increase communication of Victoria's cycle tourism offering and increase the facilitation of cycle related services.

*The Hume Region Significant Tracks and Trails Strategy 2014–23* considers regionally significant trails, which are defined as connecting areas of significant natural, cultural or economic importance, are likely to appeal to international visitors and are also likely to attract economic development opportunities as well as social, health and environmental benefits. The strategy identifies the top ten regionally significant trails in the Hume area (which includes the shires and resorts encompassed by TNE plus Wodonga, Shepparton, Mitchell, Moira, Murrindindi and Strathbogie shires) and this list includes the three aforementioned signature rail trails and Mt Buller Bike Park (including Mt Stirling).

*Victoria's Trails Strategy 2014–24* similarly identifies the Murray to Mountain Rail Trail and Mt Buller Bike Park as trails of both national and international significance, and the growing Falls Creek Bike Park and Great Victorian Rail Trail as trails of State significance. It also acknowledges that the North East is renowned for its cycling experiences.





PRIORITY PROJECT 1:  
RIDE HIGH COUNTRY – RAIL TRAILS

Aim: For the High Country to own the best rail trail network in the Southern Hemisphere, which will act as a major regional tourism driver.

Project features		Detail	Status	Lead agency
Infrastructure enhancement/development	Rail Trail Enhancements	Develop new and innovative trail features (like viewing platforms, interactive displays and art installations) that engage consumers, improve their experience and drive digital interaction/promotion. These features will first be applied to the Murray to Mountains Rail Trail, and then considered for the High Country Rail Trail and Great Victorian Rail Trail, each with their own unique look and feel.	Scoping stage for Murray to Mountains  Concept for High Country Rail Trail and Great Victorian Rail Trail	TNE in conjunction with Alpine, Indigo, Mansfield, Towong and Wangaratta shires
		Murray to Mountains trail extension from Beechworth to Yackandandah	Advanced Design	Indigo Shire
	Rail Trail Extensions	Murray to Mountains trail extension from Yackandandah to Huon	Scoping stage	Indigo Shire and Towong Shire
		High Country Rail Trail extension to Murray River Adventure Trail through Wodonga's central business area including surface upgrades from Bandiana to Sandy Creek	Scoping stage	Parklands Albury Wodonga and Wodonga Council
		Winton Wetlands to Glenrowan extension, effectively linking the Murray to Mountains Rail Trail with Benalla shire and the Glenrowan Wine Region	Scoping stage	Benalla Rural City, Rural City of Wangaratta and Winton Wetlands Committee of Management
	Trail and Surrounds Upgrade	Bright to Porepunkah Rail Trail upgrade including widening the trail and implementing new signage	Implementation stage	Alpine Shire
		Huon Reserve Redevelopment involving improving the location where the Murray to Mountains Rail Trail meets the High Country Rail Trail, effectively marking the transition between the two iconic offerings	Concept stage	Indigo Shire
	New Recreational Trail			
		Development of a new King Valley recreational ride that follows the river, effectively linking key wineries and driving cross-promotion between product pillars	Concept stage	Rural City of Wangaratta

Project features		Detail	Status	Lead agency
Product Development	Bike Hubs	The creation of centralised facilities at key bike destinations that support bike hire, servicing, tours, a social space and other bike-related information and booking services to support the needs of bike riders	Concept stage	TNE to coordinate with private entities (like Beehive) and government partners)
	Transport services	The development of a consistent and comprehensive transport service along the Rail Trail that facilitates point to point riding and the needs of varying user groups; as well as supporting transport between key bike and regional hubs	Concept stage	TNE to coordinate with private entities and government partners
	Facilitated tours	The development of facilitated tours that bring new visitors into the area from domestic and international markets, and provide a link between the available range of regional tourism experiences	Concept stage	TNE to coordinate with private entities and government partners
Marketing	Ride High Country brand development	Development of an overarching regional bike brand that encapsulates the entire bike offering	Concept stage	TNE
	Market Research	Commission research to segment the market, understand brand/product awareness, and demonstrate the economic return of local rails trails to assist with all aspects of the project and guide product-market strategies	Concept stage	TNE
	Rail trail specific marketing campaign	Take the regional product to market under a united and collaborative marketing campaign	Concept stage	TNE





**PRIORITY PROJECT 2:**  
**RIDE HIGH COUNTRY – MOUNTAIN BIKES**

Aim: To establish the High Country as the  
Australasian mountain bike destination of choice.

Project features		Detail	Status	Lead agency
Infrastructure enhancement/development	New trails and offerings	<b>Mt Buller Bike Park – Master Plan Phase 2</b> A range of iconic gravity trails, a jumps course and beginner MTB product designed to enhance the region’s hero product	Concept stage	Mt Buller Mt Stirling RMB
		<b>Falls Creek MTB project</b> Falls Creek /Bogong/Mt Beauty trail linking the three Villages, plus a pump track and new downhill trails	Partially scoped	Falls Creek Resort Management
		<b>Dinner Plain Intermediate MTB Network</b> Complementing existing beginner Village loops with a new intermediate network	Concept stage	Alpine Shire
	Trail enhancements and extensions	<b>Mt Beauty MTB Park</b> New supporting tourism infrastructure and facilities, and enhancement of existing trail network including signage and mapping	Concept stage	Alpine Shire
		<b>Alpine Community Plantation Trail Network</b> Enhancements of existing trail networks to raise the quality of the offering	Concept stage	Alpine Shire
		<b>Yackandandah to Beechworth MTB Trails</b> Enhancement of existing local trails to bring them up to tourism quality including a link between the Beechworth and Yackandandah MTB Parks	Partially scoped	Indigo Shire

Project features		Detail	Status	Lead agency
Product Development	Bike Hubs	The creation of centralised facilities at key bike destinations that support bike hire, servicing, tours, a social space and other bike-related information and booking services to support the needs of bike riders	Concept stage	TNE to coordinate with private entities (like Beehive) and government partners
	Bike friendly transport options	Facilitate access both into and around the region, linking key mountain bike parks	Concept stage	TNE to coordinate with private entities and government partners
	Multi-destinational product	Work with businesses to develop and package multi-destinational products across the High Country region	Concept stage	TNE to coordinate with private entities and government partners
Marketing	Ride High Country brand development	Development of an overarching regional bike brand that encapsulates the entire bike offering	Concept stage	TNE
	Market research	Commission research to segment the market, understand brand/product awareness, and identify any further product or infrastructure gaps to assist with all aspects of this project and guide product-market strategies	Concept stage	TNE
	Mountain bike specific marketing campaign	Take the regional product to market under a united and collaborative marketing campaign	Concept stage	TNE
	Secure high profile, world-class events	Secure events to maximise product exposure and drive visitation	Various between events	Councils/RMBs with TNE assistance



## FOOD, WINE AND BEER

Vision: For the High Country to lead innovation in the food, wine and beer space, creating a competitive differentiator that drives tourism related visitation and yield opportunities throughout the region.

### The Opportunity

According to trend analyst Future Laboratory<sup>10</sup>, the global food and wine market is experiencing growth in demand for premium alcohol (including small-batch regional spirits), craft beers and clean produce that is fresh and additive free. Against this backdrop, consumer food, wine and beer trends are also evolving.

In terms of food, consumers want to explore new flavours presented to them in exciting formats, so they are surprised and delighted by their culinary experience. Pressed for time, there is also growing demand for premium-casual food options available at low price points. In addition, people now want to know more about the provenance of their food, including an understanding of sustainable sourcing as well as how cooking waste can be used and reimaged.

As for drinks, there has been a resurgence in older and more traditional varieties, with current trends favouring vermouth, absinthe and the rediscovery of other classic drinks. Wine is also changing its image, moving away from its pretentious roots to become an everyday social beverage, which also impacts the way it is being consumed.

Similar to the Future Laboratory report, Tourism Australia has found<sup>11</sup> that visitors are now “culinary explorers” looking for local, authentic and high-calibre experiences that are driving a strong gourmet tourism that will drive growth across the country’s food and wine industry. They are also looking to engage with the produce and production processes, seeing where food is grown and meeting the growers, chefs and wine makers. With this in mind, Tourism Australia is working to increase overnight tourism spend in this space to be worth \$140 billion annually by 2020.

The greatest opportunity facing the High Country is to take advantage of these growing trends, innovating and evolving its offering to meet consumer demand, and even become a leader in this space.

Looking at wine tourism alone, even small gains in this space can deliver considerable benefits, with the market in Victoria worth \$1.04 billion<sup>12</sup>. The State attracts nearly 1.6 million domestic wine visitors per year, with 49% of this market staying overnight and generating 3.2 million visitor nights<sup>13</sup>. As for international visitors, research shows that ‘great food, wine and local cuisine’ is now a major factor in holiday decision making, ranking third ahead of ‘world class beauty’ and ‘natural environments’.<sup>14</sup>



### Current Product Credentials

The High Country features an incredibly diverse and mature offering within this product pillar.

Of the 21 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 6 craft breweries operating in the region.

The High Country is also renowned for its diverse food offering, which includes hatted restaurants (one restaurant with 2 hats, and three with 1 hat), 11 restaurants listed in The Age Good Food Guide, and an abundance of quality local produce that is used and distributed throughout the region, a great array of hands on cooking classes, a selection of popular farmer’s markets and a growing agri-tourism offering. This product portfolio is complemented by a growing coffee and café culture that includes 4 dedicated coffee roasters.

The food, wine and beer product offering is supported by a strong and varied events program that adds weight to this category being a strength for the region, including the High Country Harvest Festival, which is the leading regional food and wine event in Victoria, showcasing the breadth of the region’s offering.





Strategic Approach

The food, wine and craft beer 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 High Country’s target markets, it is essential that the offering continues to innovate, and that the industry behind it embrace ongoing product evolution.

The High Country’s food, wine and beer industry as a whole is well networked, collaborative and has capacity for growth, however not all businesses in this category have the capacity to embrace innovation. The approach taken as part of this plan is to identify businesses within the product pillar who have the greatest potential to innovate, and work with them to develop/enhance tourism products that can engage and excite visitors, and act as distinctive product heroes.

Innovation will also be achieved through driving growth in emerging product markets, with the region particularly well positioned to achieve a leadership position in the agri-tourism space.

While innovation will be supported by new infrastructure work, it will largely be driven by product development – across food, wine, beer and spirits - and promoted by dedicated marketing campaigns.

Strategic Alignment

Victoria’s Regional Tourism Strategy 2013–16 acknowledges that ‘food and wine’ as a category is a strength of regional Victoria, pointing to a depth and breadth of quality products that includes cellar doors, hatted restaurants, craft breweries and more, all of which are offered in abundance in the High Country.

Victoria’s Regional Tourism Statement<sup>15</sup> notes that government is supportive of growing food & fibre and tourism products throughout regional areas, and has committed to developing a Wine Victoria strategy that looks to provide a clear direction for the sustainable growth of wineries in Victoria (including access to associated grant funding).

The Upper, Central and Lower Hume Sub-Regions Food Opportunity Strategy 2015–18<sup>16</sup> sees agri-tourism and its links into the region’s wineries, breweries and local food outlets as being a key economic driver in the future. However, it also comments that tourist expectations of the experience have grown but the product offering is failing to meet their expectations, noting a “dire need” for industry skill building in this space. It also identifies the need for a greater winery retail offering via cellar doors, and the importance of local outlets using and promoting local produce to meet consumer demand for food with Australian provenance. All of this is supportive of the need to drive innovation within this product category.



PRIORITY PROJECT 3:  
FOOD, WINE AND BEER INDUSTRY INNOVATION

Aim: To drive innovation across the region’s key food, wine and beer offering to ensure that it is engaging, contemporary and experiential, and appealing to the Lifestyle Leader market.

Project features		Detail	Status	Lead agency
Infrastructure enhancement/development	Rutherglen Economic Revitalisation Project	This project will enhance infrastructure to support the movement of visitors into and around the retail, food and beverage operators of Rutherglen and its surrounds	Implementation	Indigo Shire
	Wine Region Accommodation	Develop new accommodation in the High Country’s wine region to fill a significant gap in the current offering	Concept	Industry
Product Development	Food innovation	Drive innovation and growth in the agri-tourism space, as well as working with food businesses to increase links to food provenance and diversification of offering	Concept	TNE and industry
	Wine innovation	Drive innovation amongst wineries with the greatest potential to evolve their tourism offering to meet changing consumption trends, and work with key GIs to help them develop unique selling propositions that increase market appeal	Concept	TNE and industry
	Beer innovation	Work with existing and new industry partners to enhance their beer experience to enable the High Country to maintain a leadership position in the brewery space	Concept	TNE and industry
	Distillery innovation	Encourage new and innovative distilleries to develop operations in the High Country region	Concept	TNE and industry
Marketing	Market Research	Research opportunities in the food, wine and beer space, looking at market segmentation, best practice analysis and demand drivers among key segments	Concept	TNE and industry
	Marketing	Implement marketing campaigns that celebrate the diversity and innovative nature of the High Country’s food, wine and beer offering	Concept	TNE



## SNOW

**Vision:** 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.

### The Opportunity

Over the last decade, the Victorian Alpine Resorts attracted an average of 674,000 winter visitors per year who generated 1.3 million visitor days in the resorts<sup>17</sup>. As such, the alpine resorts are a major contributor to the Victorian economy, with an estimated GSP of \$570 million and 5,800 Full-Time Equivalent jobs being attributable to alpine resort winter activity. They are also significant contributors to regional economies, resulting in a \$130 million boost to the Gross Regional Product of Alpine Shire, and \$89 million to Mansfield Shire.<sup>18</sup>

While the alpine resorts already act as significant tourism drivers for the High Country and surrounds, they still experience capacity issues particularly in terms of mid-week and/or off-peak visitation, suggesting there is further growth potential currently available. Harnessing this availability and maximising visitation will drive tourism opportunities not only for the alpine resorts but the entire High Country area.

Research shows that the 'ski fields/skiing and snowboarding' and winter sports are the primary product associations that people have with the High Country region (55% and 22% of the market respectively). Snow is seen as a must do experience while in the region, so it is essential that it maintains its leadership position to continue to drive tourism benefits to the High Country.



### Current Product Credentials

The High Country is home to all three of the State's major alpine resorts, so effectively owns snow in Victoria. The alpine resorts are accessible, feature a diverse range of snow activities, and offer a truly unique Australian tourism experience.

Mt Buller is the most popular snow resort, claiming 40% of the alpine resort visitor market. Located an easy three hours' drive from Melbourne and its domestic and international airports, Mt Buller attracts a large day trip market, as well as a strong contingent of internationals who visit the resort as part of their broader Victorian travel itinerary. Mt Buller has over 30 bars, cafes and restaurants, more on-mountain accommodation than any other resort, and a diverse snow offering.

Falls Creek owns 19% of the alpine resort visitor market and is known for its beautiful village in the snow and progression perfect terrain. Visitors can enjoy a broad array of available snow activities ranging from the traditional ski and snowboard offering through to snow mobile rides, snow biking and tubing, as well as a strong food and wine offer. The resort is accessible from Albury Airport (2 hours' drive) and offers lift passes that are also valid at Mt Hotham.

Mt Hotham owns 16% of the visitor market, and has built a reputation as a skier's mountain with steep alpine slopes and advanced remote terrain. Mt Hotham also boasts some of the most scenic beginner terrain with plenty of intermediate slopes to assist with skills progression. Hotham is complemented by the picturesque nearby village of Dinner Plain, which offers a variety of snow play activities, learn to ski/snowboard facilities and a spa retreat. Hotham has its own regional airport and can also be accessed from Albury Airport.





Strategic Approach

The ongoing sustainability and growth of the winter offering in Victoria’s major alpine resorts is recognised as being central to a vibrant tourism market in the High Country. As such, it is essential to continue to evolve the resort product to meet current and emerging consumer demands, ensuring that the resorts remain economic drivers for the region. It is also important to enhance the breadth of experience offered in the resorts so that they maintain relevance and interest among a broad customer base.

Such evolution will be achieved through investment in new infrastructure that will improve the customer experience, diversify the resort activity offering, improve the current capacity of the resorts, and enhance access to and round the villages.

This approach will also see infrastructure investment complemented by the attraction of new businesses who have the capacity to offer additional resort activities that appeal to the customer segments identified and prioritised as part of the Snow Victoria segmentation research.<sup>19</sup>

Strategic Alignment

The *Alpine Resorts 2012 Strategic Plan 2012* aims to establish the resorts as vibrant, growing and sustainable destinations that provide alpine tourism experiences that are available to all. In order to achieve this, it points to a need for continued investment in new activity infrastructure, and the importance of maintaining quality tourism services and assets.

The *Hume Strategy Regional Plan Key Priorities 2015–17* specifically identifies the Mt Buller Water Storage Project as a shovel ready essential infrastructure project, and the Hotham redevelopment as a priority project that is ready to advance. Both projects are seen as key in delivering iconic tourism facilities, addressing product gaps and building the visitor economy.

*Victoria’s Regional Tourism Strategy 2013–16* acknowledges the strength of the snow season offering as a nature-based tourism product, and *Victoria’s Regional Statement 2015* points to the resorts’ importance in driving significant tourism activity for the region.



PRIORITY PROJECT 4:  
ALPINE SNOW GROWTH

Aim: To develop new and enhanced tourism offerings within the alpine resorts that broaden their appeal and make them more attractive, engaging and accessible to a broad range of visitors.

Project features		Detail	Status	Lead agency
Infrastructure enhancement/development	Growing Mt Hotham Project	Development of a new commercial, leisure and recreation hub, which will also offer a focus for visitor servicing including ticket sales, visitor centre, ski hire/ ski school etc. It will also provide a central point for tourist orientation with opportunities for year-round functions and interaction with the Hotham environment.	Concept included in resort master plan	Mt Hotham RMB
	Mt Buller Horse Hill Snow Play Park and Visitor Facilities	Development of an iconic Snow Play Park that will encompass a tube park, snow adventure park and family snow playground, complemented by a day visitor facility offering tube and clothing hire, visitor amenities and food and beverage offerings	Concept included in resort master plan	Mt Buller Mt Stirling RMB
	Mt Buller Water Storage Project	Enhancing Mt Buller’s water storage to enable it to produce more man-made snow for product consistency and season longevity	Scoped and seeking funding	Mt Buller Mt Stirling RMB
	Falls Creek Nordic Bowl Altitude Training Field	Development of a centre offering cross seasonal training facilities that will diversify the resort’s activity and event offering	Scoped and seeking funding	Falls Creek RMB
Product Development	New business attraction	Identify new products that can be delivered at the resorts and secure new businesses to deliver them, diversifying the winter offering	Concept	RMBs in conjunction with TNE
	Destination Action Plan Activation	Activating the key products identified as part of the Destination Action Plan process	Scoping stage	RMBs in conjunction with TNE
Marketing	Snow Victoria campaign	Deliver engaging winter campaigns that drive awareness and uptake of the Victorian snow offering	Seasonal Implementation	RMBs in conjunction with ARCC and/or TNE



## NATURE-BASED TOURISM

**Vision:** For the High Country to feature a range of attractive nature-based tourism hubs that act as visitation and yield draw cards for the entire region.

### The Opportunity

Economic modelling released in March 2016<sup>20</sup> shows that nature-based activities add \$6.2 billion per year to Victoria's economy, supporting 71,000 jobs or 2% of Victoria's total workforce. This report itemises this contribution by tourism region, identifying the High Country and Great Ocean Road as equally contributing the highest gross value to the State - \$1.1 billion each. The High Country is the stand alone leader in sustaining employment opportunities associated with nature-based activities and recreation, supporting 13,200 FTE. The same report also found that participation in nature-based outdoor activities provides avoided healthcare system costs to the Victorian economy worth at least \$265 million a year, proving that the benefits of this type of recreation stretches beyond tourism and into community wellness and well-being.

From a tourism specific perspective, Victoria received 8 million nature-based tourism visitors in 2014, with 46% staying overnight and 54% visiting just for the day. Visitors who stayed overnight stayed for an average of 3.8 nights generating a total of 14.1 million visitor nights. This was an increase of 12% in visitors and 16% in visitor nights compared to the previous year, significantly above the national average (8% and 6% respectively).<sup>21</sup> As such, nature based tourism represents a large market with strong destination potential.

*Victoria's Nature-based Tourism Strategy 2008–12* references a perception survey that looked to understand people's destination associations with natural attractions. Of those surveyed, 31% could not name a destination in Victoria associated with a natural attraction. Respondents who could name a destination ranked the High Country as the second highest region in Victoria to be associated with natural attractions. Similarly, this survey also showed that while the Grampians and High Country were the regions most associated with adventure activities (10% and 7% respectively) an overwhelming 72% of respondents could not name a Victorian destination associated with adventure. Once again, there is opportunity for a destination to fill this awareness void and become known for its nature-based activities and experiences.

This same strategy also notes that Victoria has a lack of nature-based tourism experiences that offer high levels of interpretation, services and accommodation, and that development of appropriate infrastructure, products and strong nature-based destinations – particularly those with unique points of difference - will significantly enhance visitation and yield potential in this area. As such, opportunity exists to develop rich and highly engaging nature-based activities that a destination can become known for.

In line with this, the North East Victoria Gap Analysis noted that the profile of the High Country's visitors is changing, generating an increasing demand for nature-based experiences particularly those that are facilitated rather than self-guided. While there are some private businesses operating in this space, there are many opportunities to develop experiential products to meet demand.

The Gap Analysis also identified demand for accommodation that was unique and located within natural surrounds – in forests, near water or showcasing natural assets to enable visitors to feel closer to nature. This could include basic eco-style accommodation, or be a larger five-star development delivered in sympathy with the natural environment. This product gap also points to opportunities for relevant and astute tourism operators and investors.

### Current Product Credentials

The High Country features an abundance of stunning natural landscapes that provide the perfect backdrop to enjoy a range of nature-based activities. Indeed, the High Country is unique in the diversity of nature-based experiences that it offers – from fishing on wide open lakes and rock climbing over ancient boulders, through to camping in bushlands.

In the High Country, the alpine resorts are regarded as true nature-based tourism assets featuring signature mountain bike trails, the highest inland lake in Victoria, a snow offering that is unique in Australia, and some of the best hiking opportunities available in the region. All of the resorts, including Mt Buller, Mt Hotham, Dinner Plain, Falls Creek and Mt Buffalo, can support a diverse range of nature-based tourism experiences, particularly in the green (non-winter) period.

The region also features some major inland waterways including Lake Hume, Murray River, Mitta Mitta River, Ovens River, Dartmouth Dam, Lake Catani, Winton Wetlands, Lake Benalla, Lake Sambell, Lake William Hovell and Lake Eildon, which support water sports, house boating, fishing, camping and more.

The High Country is also known for its range of adventure-based activities that sit within the nature space including horse riding, abseiling, rock climbing, kayaking and paragliding.

Importantly, all of these experiences are very accessible.





### Strategic Approach

While the High Country offers a broad range of nature-based tourism experiences, it does not have any true iconic heroes in this space (outside of the snow season, which is profiled in a separate product pillar). That is, a lack of either standalone hero products or destinations that can act as strong nature-tourism hubs.

With this in mind, this plan looks to create strong nature-based tourism assets that are focused on particular destinations that have the potential to offer a myriad of products. The alpine resorts, with existing strengths in this space, are ideally suited to fill this product gap, with particular benefit to be gained from high-profile offerings like the Falls to Hotham Alpine Crossing.

Driving growth in green season tourism across the resorts will ensure that they act as tourism drawcards for the entire region, particular the valley towns located at their base. Work in this space will also assist in establishing the resorts to operate year-round, offering future viability in the face of climate change and its expected impact on the winter offering.

In order to become true nature-based tourism destinations, the resorts will need to develop infrastructure and products that enable them to meet the criteria that Visit Victoria has identified as being crucial to being successful in this space: attractions, access, activities, amenities and accommodation.<sup>22</sup>

In tandem with this approach, this plan also looks to develop new nature-based tourism offerings in association with key inland waterways that - with investment in significant tourism infrastructure - have the potential to become major nature-based hubs in the future. While water sports can be undertaken in a range of locations outside of the region, this work must look to emphasise how the High Country offering differs from competitors in terms of its unique natural offering.

### Strategic Alignment

*Victoria's Regional Tourism Strategy 2013–16* identifies the need for further investment in hero nature based tourism infrastructure and product development, specifically highlighting the need to complete the Falls to Hotham Alpine Crossing Master Plan and progress the development of the Mount Buffalo Chalet.

*Victoria's Trails Strategy 2014–24* sets out the need for investment in the development of trails, and points to their appeal among with domestic and international travellers who are seeking nature-based and adventure tourism experiences. The Falls to Hotham Alpine Crossing is acknowledged as being one of four Walk Victoria's Icons walks that will drive visitation and spend in regional Victoria.

As per *Victoria's Nature-based Tourism Strategy 2008–12*, Visit Victoria aims to establish the State as the leading nature-based tourism destination in Australia, renowned for diverse and accessible natural attractions. This strategy acknowledges that Victoria's key natural attractions include Mount Buffalo and the Alpine region, which offer a range of self-guided experiences but have a lot of future scope for the development of high-yielding nature based tourism experiences.

This document also highlights three regions for staged nature-based tourism development, of which Victoria's High Country is one. Priority areas include work on a public-private partnership infrastructure upgrade at Mount Buffalo Chalet and establishing the alpine resorts as attractive and world-class, year round, nature based and adventure activity hubs.

*Victoria's Regional Statement* comments that strengthening the alpine resorts as all-season destinations will be key to growing nature-based tourism in the region, and also highlights the ability to enhance tourism opportunities associated with the major waterways.

The *Hume Strategy Regional Plan Key Priorities 2015–17* report identifies the development of Lake Eildon Recreation Boating Facilities Improvement Plan as a tourism priority that will contribute to the provision of major tourism facilities and building the visitor economy.





**PRIORITY PROJECT 5:  
ALPINE RESORT GREEN SEASON ACTIVATION**

Aim: To leverage the existing green season strengths of the alpine resorts to establish them as leading nature-based tourism destinations.

Project features		Detail	Status	Lead agency
Infrastructure enhancement/ development	Falls to Hotham Alpine Crossing	Develop an iconic alpine walk that will attract both domestic and international visitors, and be a hero product for the alpine region	Scoping stage	Parks Victoria
	Falls Creek Rocky Valley Lakeside & Trail Head Development	Redevelopment of Lakeside Precinct to include new trails, water sports (accessed by a jetty and boat ramp), food and beverage options and create a memorable and iconic arrival/departure point for the Falls to Hotham Alpine Crossing	Concept stage	Falls Creek RMB
	Mount Buffalo Destination Master Plan	Develop a long-term vision for Mount Buffalo as an attractive and engaging tourism destination including planning for the future of the Mount Buffalo Chalet and business case development for the Gorge	Concept stage	Mount Buffalo Destination Advisory Group
	Mt Buller Summer Product, Activities and Events Master Plan	Development and implementation of a 5-year masterplan to drive green season infrastructure, product and event development	Concept stage	Mt Buller Mt Stirling RMB
	Hotham Tracks and Trails project	The development of a range of new trails along with enhancements that take visitors to iconic viewing points and destinations that caters for the needs of recreational walkers. This includes the Davenport enhancement.	Scoped and seeking funding	Mt Hotham RMB
Product Development	Trail running product	Develop facilitated product associated with the existing 7 peaks run initiative which is a common offering across the resorts and one that can be built to a collective strength	Scoping stage	RMBs in conjunction with TNE
	Walking/ hiking product development	Develop facilitated product associated with walks/hikes – a common offering across the resorts – which also supports signature walking trails (existing and emerging)	Scoping stage	RMBs in conjunction with TNE
	Destination Action Plan Activation	Activating the key products identified as part of the Destination Action Plan process for the resorts	Scoping stage	RMBs in conjunction with TNE
Marketing	Product marketing campaigns	The delivery of collaborative campaigns that drive awareness and uptake of the alpine resort's product strengths (like the 7 Peaks campaigns)	Delivered but scope to enhance	TNE
	Brand Work	Brand development for the 7 Peaks Walk offering	Scoped	TNE

**PRIORITY PROJECT 6:  
INLAND WATERWAY HUBS**

Aim: To establish attractive nature-based tourism offering associated with key regional waterways that have the potential to be future tourism drivers.



Project features		Detail	Status	Lead agency
Infrastructure enhancement/ development	Lake Eildon Recreational Boating Facilities Improvement Plan	Identify gaps in current boating infrastructure and develop a coordinated approach to the provision of new tourism facilities	Scoping stage	Mansfield Shire Council
	Tallangatta Holiday Park Redevelopment	The redevelopment of accommodation on the foreshore of Lake Hume that will activate the entire area, including facilitating access to water sports, offering new walk/bike trails around the waterway, and developing amphitheatre and glamping offering	Scoped and partially funded	Towong Shire Council
Product Development	Key waterway hub products	Attract businesses to develop new products to activate rivers and inland waterways	Concept	TNE with industry and Council support
Marketing	Brand and marketing	Brand and marketing work to follow infrastructure and product development	Concept	TNE



## ARTS AND CULTURAL HERITAGE

Vision: Establish the region's arts and culture credentials to both diversify the demographic attracted to the High Country, and increase dispersal throughout the region.

### The Opportunity

Cultural tourism visitors are defined as those who have attended a theatre performance, a concert or other performing arts, a cultural festival, fair or event, visited a museum, art gallery, or a history or heritage site or participated in a craft workshop while on their trip. Cultural tourism has seen steady growth over the past decade with long term growth particularly forecast among domestic visitors, who currently dominate this market.<sup>23</sup>

Much of this growth is forecast to be amongst younger visitors, so an opportunity exists for destinations to develop engaging, contemporary and innovative offerings in this space to capitalise on this trend. In particular, *Victoria's Arts, Theatre & Cultural Heritage Tourism Action Plan 2010–14* notes the importance of using digital technologies to facilitate and enhance product delivery, as technology is now often central to consumer engagement with these type of products. This opportunity is important as cultural tourists are valuable, typically staying at a destination for longer and having a higher than average spend than non-cultural visitors.

Research cited in *Victoria's Aboriginal Tourism Development Strategy 2013–23* also found that Victorian visitors are looking for indigenous tourism experiences that are positive, future focused, highlight unique cultural components and are a part of wider Australian cultural heritage experiences. Again, the opportunity exists to develop engaging product that effectively meets these needs, underpinning other High Country product pillars with an experiential indigenous offering. If this can be done effectively, the region will also be in a better position to leverage broader Tourism Australia and Visit Victoria marketing efforts both within Australia and abroad.

The North East Victoria Gap Analysis found that visitors to the region are looking for immersive arts and culture products that include rich and often interactive/experiential interpretations of regional stories. They want modern and relevant experiences, so there is great potential to enhance the region's offer in this area.



### Current Product Credentials

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 offering that includes the alpine areas. The North East is also known for its range of quaint towns and Villages, which feature charming historic streetscapes that allow visitors to immerse themselves in a bygone era.

Benalla Rural City has looked to position itself as a leader in the arts space, with a waterfront gallery featuring a range of both contemporary and traditional displays, 'Wall to Wall' street murals, a number of small museums and commitment to developing an indigenous offering, particularly at Winton Wetlands.

Other pockets of arts, cultural and heritage product can be found throughout the region, each offering a unique experience including outdoor art installations, historic huts and sites, museums, and local arts and culture displays.





Strategic Approach

The High Country’s rich history and artistic leanings means that it has huge potential in the arts, culture and heritage space. However, few North East destinations have moved beyond the traditional interpretation of cultural heritage, and what is on offer is largely limited and lacking cohesion, with no stand-alone hero products in this space.

To address this issue, this plan will look to develop innovative arts and culture products that allow for a modern interpretation of the category. This includes reimagining the Ned Kelly story, linking the disparate items and interpretation of the legend throughout the region to create an engaging and contemporary product.

In a similar manner, this approach includes the identification of key art products throughout the region that are dynamic and iconic – particularly those that are outdoors and set against the natural landscape that the region is so renowned for - and linking them via a touring route. This will include installations like the new enhancements recommended for the Murray to Mountains Rail Trail, new arts and culture based installations at Winton Wetlands, Mt Beauty sculptures and plenty more.

The region will also look to develop an indigenous offering that again offers a modern interpretation of the local story that is meaningful and representative of local communities.

In line with the findings of the Gap Analysis these experiences will be immersive, memorable and experiential.

Strategic Alignment

Victoria’s Arts, Theatre & Cultural Heritage Tourism Action Plan 2010–14 points to the rejuvenation and reimagining of existing cultural tourism products including infrastructure, services and product development as being central to success in the cultural tourism space. In particular, it notes that the greatest opportunity for regional Victoria is linking cultural tourism products with other products strengths like food and wine, other attractions and events – an area which is a strength for the High Country

Victoria’s Aboriginal Tourism Development Strategy 2013–23 also acknowledges that indigenous experiences are key to driving visitor dispersal throughout regional Victoria, and sets a key directive to develop and promote regional Victorian indigenous offerings, particularly those that are rich and align with existing tourism initiatives.



PRIORITY PROJECT 7:  
ARTS AND CULTURE INVIGORATION

Aim: To reinvigorate the region’s arts and culture tourism experience via a modern interpretation of the product offering.

Project features		Detail	Status	Lead agency
Infrastructure enhancement/ development	Benalla Art Gallery Redevelopment	Development of additional exhibition space including the repositioning of the current café	Scoped and seeking funding	Benalla Rural City
	Winton Wetlands Connectivity Project	Develop trails linking the Wetlands with surrounding areas including a boardwalk across the wetlands, supported by the activation of nodes along the journey delivering an engaging and dynamic digital, arts and cultural visitor experience	Scoped and seeking funding	Benalla Rural City and Winton Wetlands Committee of Management
	Wangaratta Arts and Culture Precinct	Expand and intensify existing cultural infrastructure to create an arts and cultural destination of regional significance	Scoping	Rural City of Wangaratta
	Bullawah Trail Project	Installations on a 2.4km trail along the Ovens River celebrating indigenous culture and heritage including sculptures/public art, native plantings and interpretive signage	Implementation – completed by end of 2016	Rural City of Wangaratta
Product Development	Ned Kelly Alive	Unify the disparate Ned Kelly offering that sits across the region to provide an engaging and interesting interpretive offering	Concept	TNE in conjunction with relevant Councils and other entities
	High Country Indigenous Offering	Develop an engaging and meaningful indigenous offering that is interpreted in a modern way	Concept	TNE in conjunction with relevant Councils and RMBs
	High Country Arts Discovery Product	Identify and link the contemporary art offering throughout the High Country, with a focus on outdoor installations that underpin other product pillars	Concept	TNE in conjunction with relevant Councils and RMBs
Marketing	Product brand and marketing work	Once arts, culture and heritage products have been developed, brand and marketing work will be required to take them to market	Concept	TNE
	Market Research	Commission research to segment the market, understand brand/product awareness and gain further insight into visitor needs in this space	Concept	TNE



## DIGITAL EXCELLENCE

Vision: The High Country will set industry best practice for the use of digital technologies in all aspects of the region's offering, delivering a superior **visitor** experience that differentiates it from competitors.

### The Opportunity

Digital technology is now an essential part of the tourism experience. Digital channels are used to research and book travel plans, facilitate and/or complement the tourism experience, and also to engage with customers pre, during and post visit.

When considering a holiday, 80% of travellers use the Internet to plan their trip<sup>24</sup>, with visitors who book online reviewing an average of 32 websites in the inspiration/plan/book cycle, and those who book offline referring to 22 sites in the same cycle. When planning for a holiday, search engines are used by 60% of people as their primary information source. Once they have arrived at their destination, 84% of travellers will use a search engine on a mobile device to find available activities and excursions, and 36% of them refer to the destination website or app.

However, technology is not only being used for information and booking purposes – it is also being used to positively impact all facets of the customer journey as well as enhance the on-the-ground tourism product. It is now used for ticketing, way-finding, connecting with like-minded travellers and facilitating products like guided tours, just to name a few. Indeed, the fact that people carry a mobile device with them at all times creates a range of opportunities to deliver personalised tourism experiences and services, which includes both new offerings and a revitalisation of traditional products.

Social media is also a crucial part of the experience, used for researching, capturing and promoting the tourism offering. That is, 52% of travellers were so influenced by social media that they changed their original travel plans, while 62% of leisure travellers want to see a video before they make a final holiday decision. Furthermore, 76% of social media users post vacation photos to their social networks.<sup>25</sup> As such, social media channels are now central to influencing booking decisions, product and brand development, and word of mouth promotion of the tourism offering.

Taking advantage of these trends provides immense opportunities in terms of maximising visitation, the visitor experience, repeat visitation and ongoing promotion and exposure. Establishing legitimate credentials in this space can be a destination game-changer.

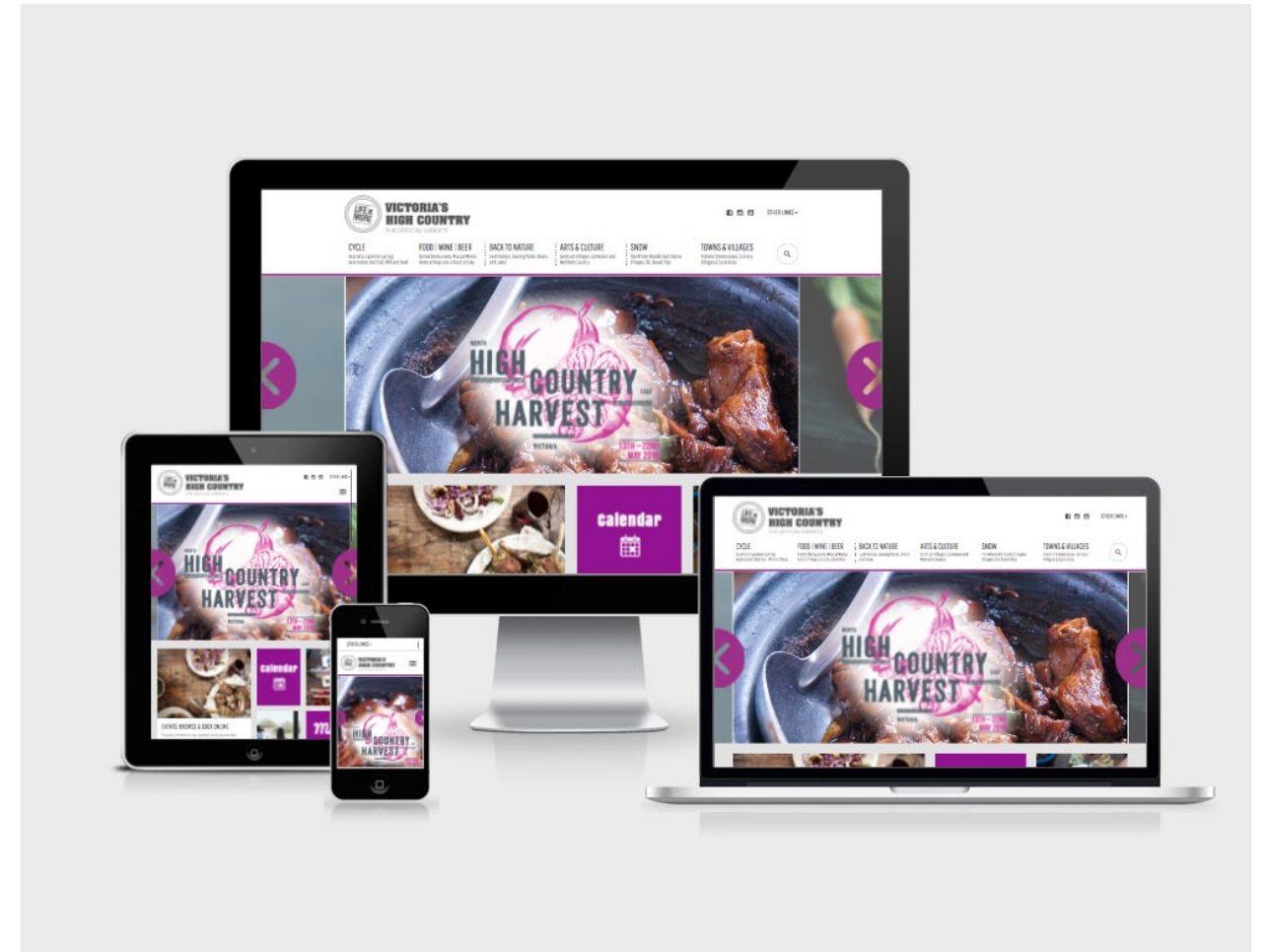


### Current Product Credentials

The High Country destination and product offering is represented online via the Regional Digital Platform - a collaboratively built, maintained and enhanced technology platform that delivers multiple destination and regional tourism websites with consolidated online booking capabilities.

From a consumer perspective, this platform provides visitors with access to information about the entire High Country region, ensuring that all destinations, hero products and businesses are represented by current and engaging websites. These sites have online booking capabilities, provide customers with timely and accurate information, and also allows them to access details about the broader complementary regional offering. Importantly, these sites are optimised for use on different devices, including PCs, tablets and mobile phones, meaning that destination and product information is immediately and easily accessible.

The roll-out of this platform has meant that the industry as a whole has up-skilled to maximise their online presence, which has also lead to an improvement in the region's social media presence to meet current visitor demand. Success in this space is reflected in the increase of individual site followers and growth in engagement and interactivity.





Strategic Approach

Under this category, the region will look to achieve digital excellence across its existing digital channels as well as pioneer the use of the latest digital formats across new platforms.

While the High Country has a range of digital assets, there is still a great deal of capacity and opportunity associated with optimising their functionality and effectiveness, particularly in association with the Regional Digital Platform. For existing destination and hero product websites, this includes finessing existing features, introducing new and engaging functionality, and also improving content creation and delivery across the region. It is important that the region also works towards a time when the breadth of the High Country tourism offering is available for booking online, including accommodation, tours and activities, transport and product hire.

As part of the Digital Activation project, the High Country will also lead the way in delivering information about the destination, current activities and events, and wayfinding when visitors are in-region. This will be delivered via a range of new information dissemination nodes, points and channels, as per the findings of the Digital Activation research scheduled for 2016-17, and will present new dispersal and yield opportunities to local businesses.

The High Country will pioneer the development and installation of new and innovative digital offerings. This includes the identification of technologies (existing and emerging) that can be applied to the tourism landscape to enhance the customer experience or even become the product itself, like augmented and virtual reality. It also involves working with existing businesses to improve their offerings via digital channels.

In this way, the High Country aims to use technology to deliver a high-quality and integrated digital experience across all aspects of the tourism experience, achieving excellence in this space.

Strategic Alignment

*Victoria's 2020 Tourism Strategy* identifies digital excellence as being one of seven priority areas for the State over coming years, noting that visitors now expect seamless and accessible digital experiences. *Victoria's Regional Tourism Strategy 2013–16* also identifies digital excellence as being one of the five key strategic areas that must be delivered upon to ensure growth across the State's regional tourism offering.

The *Hume Strategy Regional Plan Key Priorities 2015–17* report prioritises building digital infrastructure capacity across the region, particularly flagging support for local government digital readiness strategies.

In its *2020 Strategy*, Tourism Australia notes that building strong digital capacity is essential for the marketing and distribution of the tourism product, however only one third of Australian tourism operators have online booking and payment facilities.

PRIORITY PROJECT 8:  
DIGITAL EXCELLENCE

Aim: Use digital technology to make the High Country experience easier to research, access and enjoy, driving positive tourism outcomes across the region.

Project features		Detail	Status	Lead agency
Infrastructure enhancement/development	Digital Activation Implementation	Implement new and enhanced channels to disseminate destination content when in-region, assisting visitors in navigating the destination and/or product experience	Scoping stage	TNE
	Improving the Regional Digital Platform	Enhance and extend the existing platform to improve the customer experience	Concept	TNE
	Digital Dominance Project	Identify market leading technologies and apply them to the High Country tourist offering to deliver new visitor experiences and take the lead in the digital tourism space	Concept	TNE
Product Development	Digital Diversification	Enhance existing products and services through the addition of digital technologies and applications	Concept	TNE
Marketing	Marketing	Marketing to follow the launch of new and unique digital infrastructure that significantly enhances the tourism experience	Concept	TNE



## 11. PLAN IMPLEMENTATION

The implementation of all eight of these priority projects requires significant investment from public and private entities. However, collective support of these priorities will focus regional efforts and maximise returns to the local visitor economy.

The timeline for the realisation of each of these priorities will vary, which is a reflection of the fact that multiple parties are associated with their implementation and that relevant experience, funding and delivery capability will also differ between projects. However, the High Country will work towards meeting the 2023 timeframe defined by this Plan, with a view to delivering significant tourism gains for the region.

Indeed, infrastructure and product development and enhancements across all of these projects are expected to provide people with more reasons to visit and travel throughout the region, and engage with an offering that is relevant to their needs. New and enhanced products also provide greater opportunities for market exposure, ensure that visitors have a more enjoyable experience when in-region, and provide additional reasons to visit again.

From a marketing perspective, the collective commissioning of relevant market research and development of associated product brands will ensure that the High Country is able to effectively capture customer awareness and interest. Investment in dedicated and high-profile marketing campaigns of scale will also ensure that the High Country and its priority projects sit front of mind with existing and potential visitors, effectively driving conversion among key segments.

The combination of these infrastructure, product development and marketing efforts is expected to increase the number of people visiting the High Country, create more opportunities for yield via an increased range of tourism experiences, and provide a breadth of offering that necessitates overnight stays. These efforts will place the High Country in the best possible position to meet its visitation, source market and yield targets, and become a true leader in Victoria's regional tourism space.

## 12. MONITORING AND CONTROL

Progress against the priority projects noted within the Destination Management Plan will be reviewed on an annual basis. TNE will coordinate the review, working with Councils and Resort Management Boards to analyse how they have advanced the Plan initiatives for which they are the lead agency, as well as noting TNE's own efforts in delivering the components of the Plan that it is responsible for. This progress report will also provide an overview of how the priority projects are contributing to the overarching regional visitation objectives, as well as make recommendations for any broader reviews and updates required of the Destination Management Plan itself.

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