

DECEMBER
2022

MURRAY REGION DESTINATION MANAGEMENT PLAN

Acknowledgement of Country

We acknowledge the Traditional Custodians of the land and waters that surround the Murray River. We acknowledge and respect their history, culture and continuous connection to country.

We pay our respects to elders – past, present and emerging who have cared for this country for over 60,000 years.

This landscape, rich in story and opportunity, plays a pivotal part in our visitor economy and we thank Victoria and New South Wales' First Peoples for sharing this with us all.



Message from the Chair

As Chair of the Murray Regional Tourism (MRT) Board, I am proud to present our Destination Management Plan (DMP), which will provide a blueprint for the future to drive more visitors to the Murray region.

The five-year outline of our DMP builds on the successes of the 2018 DMP, with a clearly articulated strategic approach to a range of tourism experiences and product development that will ensure continued sustainable growth of the visitor economy.

Providing an overarching tourism strategy, a clear developmental direction, focused product development and support for infrastructure, MRT has set about realising its goal of making the Murray region a must visit destination for visitors. Our success has been due to the strong collaboration between the Murray River communities; a unique cross border partnership.

The DMP is the result of significant consultation and engagement with a broad range of stakeholders, from governments at both the State and local level to tourism operators, large and small.

Tourism draws billions of dollars into local economies, making the sector's growth crucial for all destinations and communities along the Murray River and is the second largest employer providing 20 per cent of the region's jobs.

Our DMP not only meets those challenges but embraces the opportunities cross-border collaboration provides. The focus is very much on the visitor experience and expectation as a community of interest, rather than on borders or geographical boundaries.

The Murray River is an Australian icon and lifeblood of many communities and winds through three States, presenting unique challenges to tourism operators. At the time of finalising our DMP major floods had impacted many of our areas causing significant heartache for communities and substantial losses throughout. The impact on the visitor economy in the lead up to our major holiday period at Christmas/New Year will have dire short- and long-term consequences throughout the region. These hardships are a continuation of three very difficult years with bushfires and the COVID-19 pandemic and the constant border closures that significantly impacted our region.

Our plan identifies six priority themes under which an extensive range of priority development projects are detailed, as well as highlighting marketing opportunities required to grow the visitor economy in the Murray region. The plan continues to build on the significant product that is Murray River Road, an experience led product, highlighting the more than 2500 kilometres of breathtaking scenery which make up the mighty Murray region and the diverse range of key offerings and adventures along the river. Importantly, we would like to assist our First Nations peoples in the development of tourism product should they be interested.

MRT works with all its stakeholders to ensure the visitor economy supports a sustainable environment, underpins sustainable and ongoing jobs and reinforces a balance of economic and social outcomes.


The plan details the way forward for destination management, a critical element for the long term, sustainable growth of tourism along the Murray region with consideration of economic viability, environmental protection and social equity that underpins our strategic pillars to grow the region's visitor economy.

Our strategic plan and annual business plan will more specifically allocate resources and priorities within the DMP.

In developing the plan, MRT partnered with Destination Riverina Murray (New South Wales) to align strategic initiatives across two complementary DMPs for the region. The Murray region plan covers cross border experiences in both NSW and Victoria within our 13 Local Government partner areas, while the Destination Riverina Murray plan focuses on the NSW side of the Murray region only.

We see this plan as a vital tool for the industry, all levels of government and potential investors as we believe it will provide greater certainty for tourism development and investment, and the best possible outcomes for our communities.

Implementation is a partnership responsibility between all stakeholders and by delivering on this plan, we will continue to drive visitation growth, increase visitor expenditure and generate more jobs for the people of the fabulous Murray region.



Wendy Greiner
Chair, Murray Regional Tourism
December 2022

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ACRONYMS

| | |
|------|---------------------------------------|
| AAGR | Average Annual Growth Rate |
| ABR | Australian Business Register |
| CALD | Culturally and Linguistically Diverse |
| DMP | Destination Management Plan |
| IVS | International Visitor Survey |
| LGA | Local Government Area |
| MDBA | Murray Darling Basin Authority |
| MRT | Murray Regional Tourism |
| NVS | National Visitor Survey |
| TRA | Tourism Research Australia |
| VFR | Visiting Friends and Relatives |

GLOSSARY OF TERMS

| | |
|------------------------------|--|
| Daytrip Visitor | Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded. |
| Overnight Visitor | People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS. |
| International Visitor | A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia less than one year and are aged 15 years or over. |

EXECUTIVE SUMMARY

The Murray Region Destination Management Plan has been prepared by Murray Regional Tourism to guide the future of the region's visitor economy between 2023 to 2027. A review and refresh of the 2017 DMP has been undertaken, considering previous projects in this new and ever-changing tourism landscape.

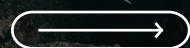


“

The Murray Region will be recognised as Australia's premier inland destination to experience waterways, abundant nature and rich culture.

”

Vision



Destination Management Objectives



The following objectives have been identified to drive the development of the Murray region.

- ▶ Drive regional dispersal and exploration of the region to strengthen emerging destinations and yield.
- ▶ Promote sustainable approaches to tourism with consideration of economic viability, environmental protection and social equity.
- ▶ Support First Nations led development and delivery of tourism experiences.
- ▶ Facilitate partnerships to develop cohesive cross border destinations and identities.
- ▶ Encourage year round visitation growth to support business sustainability.
- ▶ Encourage the development of motivating products and experiences to attract new markets and grow yield from existing markets.

The Tourism Landscape



6.8 M visitors¹



\$1.8 B spend¹

¹Tourism Research Australia's National Visitor Survey and International Visitor Survey data for 2019.

The Murray River and its waterways are the heart of the region, driving visitation along with natural landscapes such as River Red Gum Forests, wetlands and bushlands.

These assets provide a unique backdrop for the region, and generate a range of activities such as boating, water way cruising, walking and cycling, water sports, camping, 4WD and other outdoor and adventure pursuits.

As a cross-border region spanning Victoria and New South Wales, with a number of twin city and town destinations, the Murray region tourism landscape is unique in the context of Australia. This presents a number of strengths and challenges.

Positioning the Region for Growth



The visitor is at the heart of this Destination Management Plan.

The Plan draws on an in-depth consumer research program which explored the expectations, needs and demand from current and future visitors from the Australian market.

This ensures the strategy for the Murray region visitor economy responds to what will drive growth, demand and spend from target markets.



5.1M

Australian Market Size



+3,000

Rooms needed by 2032

Demand for Murray region experiences



51%

Cruising the Murray River by boat



47%

Escape amongst nature



43%

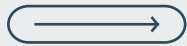
Fishing and camping



41%

Spectacular nature

Destination Management Framework



Murray Region Destination Management Plan Strategic Pillars

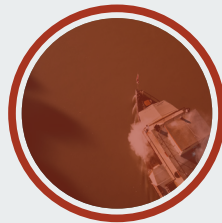
Six strategic pillars and goals have been identified for the DMP. These are the focus areas that will enable the Murray region to achieve the vision and objectives.

The pillars identified respond to unique needs and opportunities for the Murray region, building on themes and priorities of the past DMP. In addition, this aligns to the NSW Visitor Economy Plan 2030 and Victorian Masterplan Directions Paper.



Activate Waterways

Embed waterway cruising and activation into the region as the number one way to experience the Murray.



Invest in Icons

Establish icon assets that drive demand, improve awareness and facilitate destination growth.



Create Vibrant Destinations

Create complete and compelling destinations through investment in amenities, activations and food and beverage.



Elevate First Nations Experiences

Support Traditional Owners to build their capacity to develop products and experiences that connect visitors to cultures.



Drive Demand

Invest in demand driving initiatives and activities which motivate and grow visitation to the Murray region and attract new markets.



Build Capacity & Facilitate Growth

Facilitate visitation growth to the Murray region through investment in infrastructure, marketing and visitor servicing, and industry support and development.

DMP Performance Targets



Economic Growth

- ⦿ Increased visitor expenditure.
- ⦿ Increased visitor length of stay.
- ⦿ Increased visitation, in particular holiday and leisure, family and luxury travellers.
- ⦿ Increased repeat visitation.



Investment

- ⦿ Investment in tourism products, infrastructure, experiences and accommodation by private and public sector.
- ⦿ Improved diversity of product, experience and accommodation offering.



Industry Growth

- ⦿ Increased industry collaboration.
- ⦿ Improved cross border collaboration.
- ⦿ Improved industry performance and health.



Sustainability

- ⦿ Improved health of waterways.
- ⦿ Improved resilience to natural disasters and disruptive events.

MURRAY REGION DESTINATION MANAGEMENT PLAN



1. INTRODUCTION

Murray Regional Tourism (MRT) have developed a Destination Management Plan for the Murray region, to guide the growth of the visitor economy between 2023-2027.

Urban Enterprise have been appointed to review and refresh the 2017 Destination Management Plan. Many projects from the 2017 Destination Management Plan remain relevant, due to the difficulty in delivering these during the COVID-19 Pandemic. These projects have been considered within this new and everchanging landscape.

Murray Regional Tourism (MRT) is the peak tourism organisation for the Murray region, responsible for providing the overarching tourism strategy to guide development of the visitor economy. It is the only Regional Tourism Board with a remit across two States, Victoria and NSW. The 13 Local Government Areas (LGA) that comprise the Murray region have been demonstrated on the map below.

The Murray region is a diverse and rich region that encompasses across both sides of the New South Wales-Victorian border. The Murray River connects the region, and is the source of much of the existing visitation to and awareness of its surrounding townships. The Murray region is subject to unique land and waterway management, given the vested interest of two States, numerous Government authorities and 13 local government authorities.

This Destination Management Plan (DMP) has been developed through the application of best practice principles. A rigorous process of research, in-depth stakeholder engagement and assessment was undertaken to inform the project. This has been summarised in Appendix A.

F1. THE MURRAY REGION



2. MURRAY REGION TOURISM LANDSCAPE

The Murray River and its waterways are the heart of the region, driving visitation along with natural landscapes such as River Red Gum Forests, wetlands and bushland experiences. These assets provide a unique, picturesque backdrop for the region, and generate a range of activities such as boating, water way cruising, walking and cycling, water sports, camping, 4WD driving and other outdoor and adventure pursuits.

As a cross border destination spanning Victoria and New South Wales, the Murray region tourism landscape is unique in the context of Australia. This presents a number of strengths and challenges, as demonstrated below.

F2. MURRAY REGION TOURISM LANDSCAPE



The Murray region is in the destination growth phase, drawing on a foundation of habitual visitors. A large proportion of destinations are, however, in their infancy and have major growth potential.



Strong domestic overnight market of 3.3 million, driving 74% of domestic spend. Opportunity to substantially grow this with investment in new accommodation stock aligned to market demand and expectations.



The Murray River, its tributaries, lakes and other waterways drive existing boating, watersport, fishing and cruising visitation to the region. There is potential to broaden market appeal of these activities through investment in commercial activations, cruising and water-based experiences and supporting infrastructure.



Emerging strength in culture and heritage, drawing on post settlement paddlesteamer heritage, and growing First Nations experiences and cultural destinations.



Golf, sporting and recreation are a key motivator for travel to the region. Some facilities have seen major re-investment, however there remains further opportunity to improve amenity and quality of experiences to keep pace with competing destinations.



Quality and diversity of the food and beverage scene is growing, however there remain gaps in the offering across the region's destinations. Across the region, there is significant opportunity for growth in agritourism experiences and strengthening of the Murray River produce brand.



There is a small but growing number of boutique and luxury food and accommodation experiences beginning to attract high-yield visitors. Continued development of higher-end product will strengthen the appeal of the Murray in target markets.



Unique challenges are faced by Murray region operators a result of the scale of the region, and the nature of being a cross-border region. Unclear visitor economy governance structures, roles and responsibilities impact upon co-ordinated delivery of local and regional investment and marketing activities.

Workforce shortages, skills and housing continue to be a major issue facing the region, impacting growth now and into the future.

3. DESTINATION MANAGEMENT

What is Best Practice Destination Management?

Destination Management Planning is based on the holistic consideration of a region's tourism industry, and the tourism industry's position in the State and National economy. Destination Management Plans (DMPs) reflect the attributes of each destination, providing a blueprint for future investment in tourism including new experiences and attractions, and infrastructure requirements (roads, parks, technology) to support visitor growth.

Successful destination management is a holistic process that ensures tourism adds value to the economy, social fabric and ecology of our communities. It is achieved through strong leadership with consideration of people, product and place.

The Murray Region Destination Management Plan follows the Guide to Best Practice in Destination Management, as developed by the Australian Regional Tourism Network (ARTN). This ensures MRT can support visitor economy growth and sustainability by considering all destination management needs.

The 3 Key Elements of Destination Management



Place

Defining the destination in the eyes of the visitor and communities of interest and understanding the visitor journey to and within the region.



People

Cohesive governance and strong leadership, engaged industry and qualified and experienced labour force.



Product

Motivating products, quality infrastructure and experiences on offer that draw visitors and provide to visitor needs.

Role of Murray Regional Tourism in Destination Management

Regional Tourism Boards are independent local organisations which were first established in 2008, with 11 now operating across Victoria. They set regional strategic directions and work with industry, Local Government and the Victorian Government to drive tourism in their region.

MRT is the Regional Tourism Board for the Murray region, which spans across NSW and Victoria. The organisation is jointly funded via its 13 stakeholder councils and two State agencies.

The role of Regional Tourism Boards are to act as a key conduit in supporting local tourism products and services in building capability and providing them with marketing opportunities to amplify destination awareness¹. They receive funding from State and Local Governments.

Murray Regional Tourism Board works in collaboration with Local Government partners to undertake regional planning, investment attraction and marketing.

Local Government, by contrast, are responsible for acting as an enabler for the visitor economy by providing the foundations, including community infrastructure, planning, development support, visitor information services, and industry development activities to support to the local industry.

There can be some overlap in the roles and responsibilities of MRT and Local Governments, particularly in the areas of visitor information servicing, marketing and industry development. It is important that MRT and its Local Government partners continually communicate and collaborate to ensure clarity for industry and improve visitor economy outcomes.

¹ Visit Victoria

The Murray Region's Destination Lifecycle

Visitor destinations journey through a destination lifecycle across their development, as depicted adjacent.

The Murray region itself is within the growth phase, drawing on a foundation of habitual visitors. Significant demand has been built by the local industry and MRT. This has supported growth in regional visitation, as well as development of new products and experiences.

In the growth stage, it is important MRT undertakes investment attraction and marketing activities to strengthen the brand and quality of visitor experiences provided, as well as facilitate industry development and improve sustainability.

Across the region itself, there is diversity in destination maturity. A large number of destinations within the Murray region are in their infancy and have major growth potential. Support can be provided to these destinations through investment facilitation, marketing activities, and education and training programs for industry.

Stages of the Destination Lifecycle

| | |
|---|---|
| Introduction The early development of a destination, typically driven by one sector. | Growth This is characterised by growing demand and awareness, an increase in visitation, and increasing product development. |
| Maturity Products and experiences are refined, the destination brand and position is strong, and visitor yield is high. | Decline / Revitalisation The destination either begins to lose market share due to stagnation or is re-ignited through revitalisation work. |

4. STATE OF THE INDUSTRY

The Murray region experienced significant growth of an additional 800,000 visitors between 2017 and 2019, driven by strong growth in daytrip visitation. The region experienced a downturn in visitation during 2020 and 2021 as a result of the COVID-19 pandemic, however the visitor economy rebounded strongly in 2022.

This section draws on Tourism Research Australia (TRA), the widely accepted Australian Government data source tracking visitation across Australia. This data has been presented for the region for the 2019 calendar year, in order to reflect a business-as-usual scenario prior to the COVID-19 pandemic.

4.1. MURRAY REGION PERFORMANCE

In 2019, the Murray region attracted 6.8 million visitors, including 3.5 million daytrip (51%), 3.3 million overnight (48%) and 77,000 international visitors (1%).

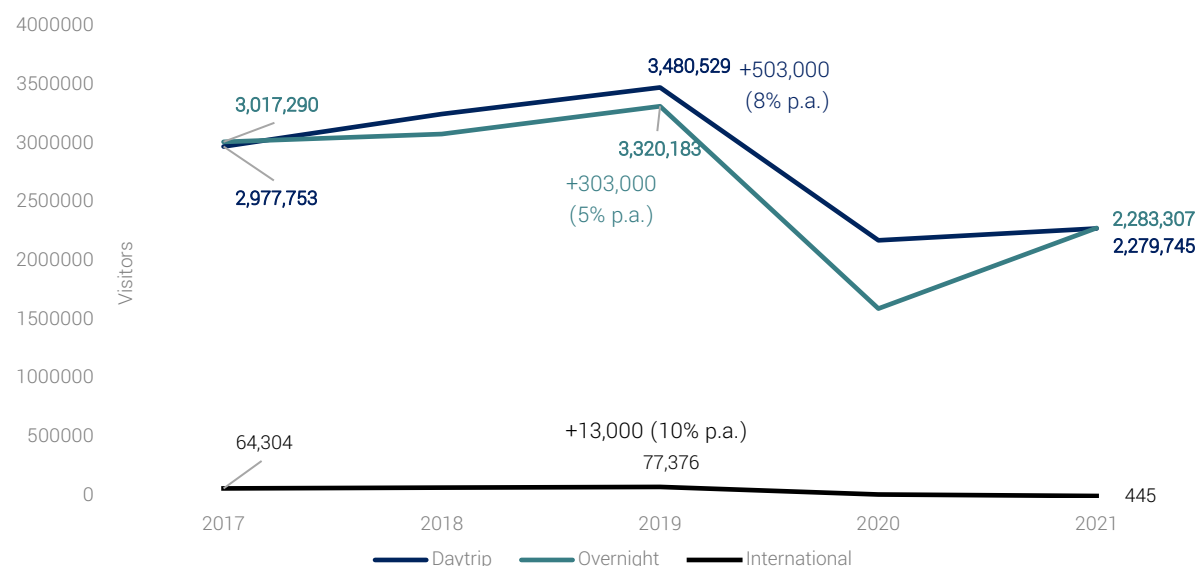
The graph below presents the historic visitation trends since the preparation of the previous DMP. Between 2017 and 2019, visitation to the Murray region increased by an average of 7% per annum. This increase included an additional 503,000 daytrip, 358,000 overnight and 11,000 international visitors to the region.

The impacts of COVID-19 restrictions greatly impacted the region's visitor economy, with a sharp decline in visitor numbers in 2020. However, with restrictions easing, visitation to the Murray region is resuming and is expected to continue to grow.

Data on the following page presents visitation to the LGAs within the Murray region in 2019. Albury and Campaspe Councils contribute the greatest to regional visitation, attracting 1.2 million and 1.4 million visitors respectively in 2019.

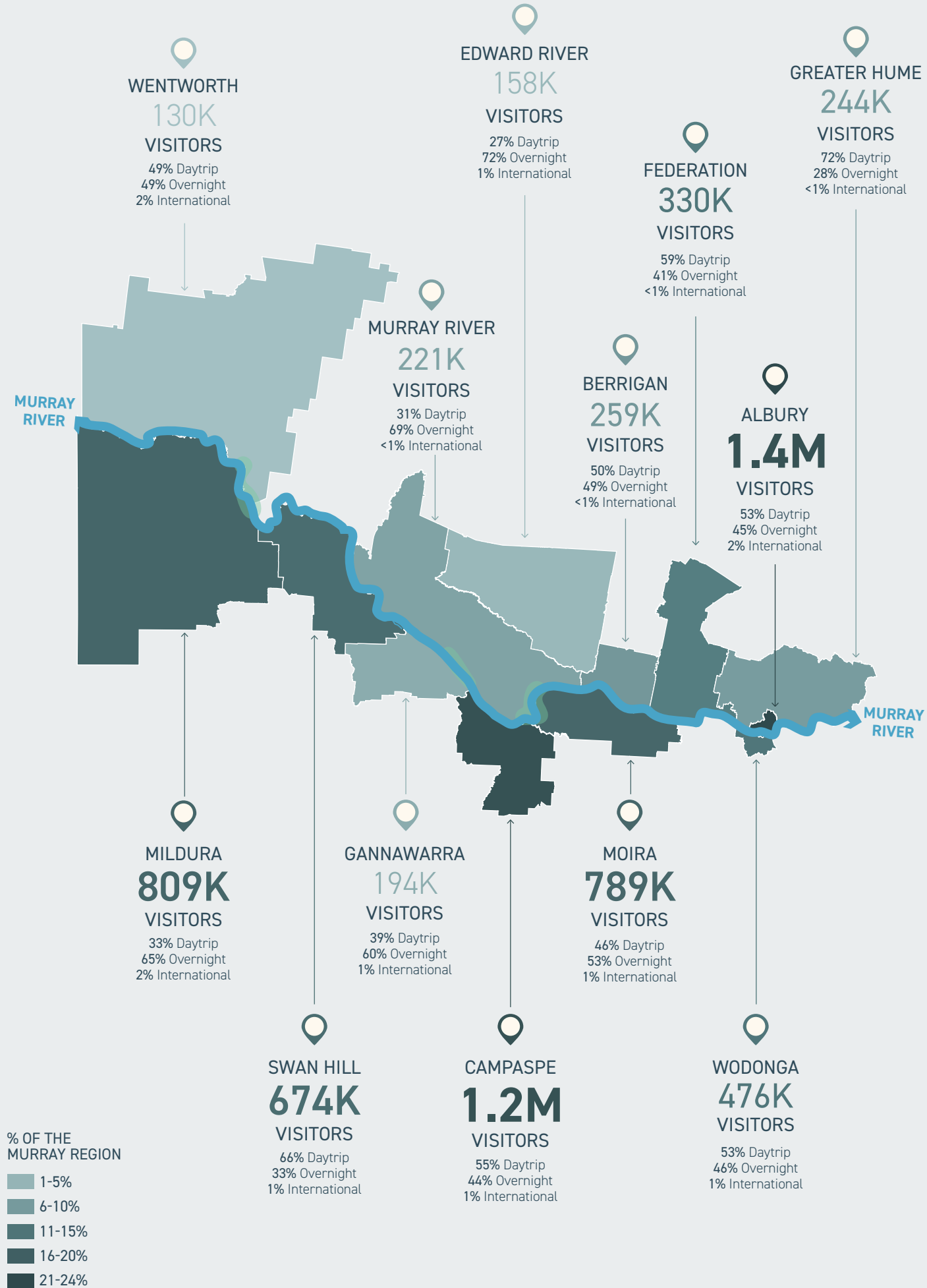
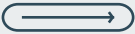
Through this Strategy, there is an opportunity to encourage visitor dispersal to other destinations within the Murray region that have a smaller visitor economy.

F3. HISTORIC VISITATION TRENDS



Source: Tourism Research Australia, National Visitor Survey and International Visitor Survey, 2017-2021.

Murray Region
Visitor Dispersal



VALUE OF VISITOR ECONOMY

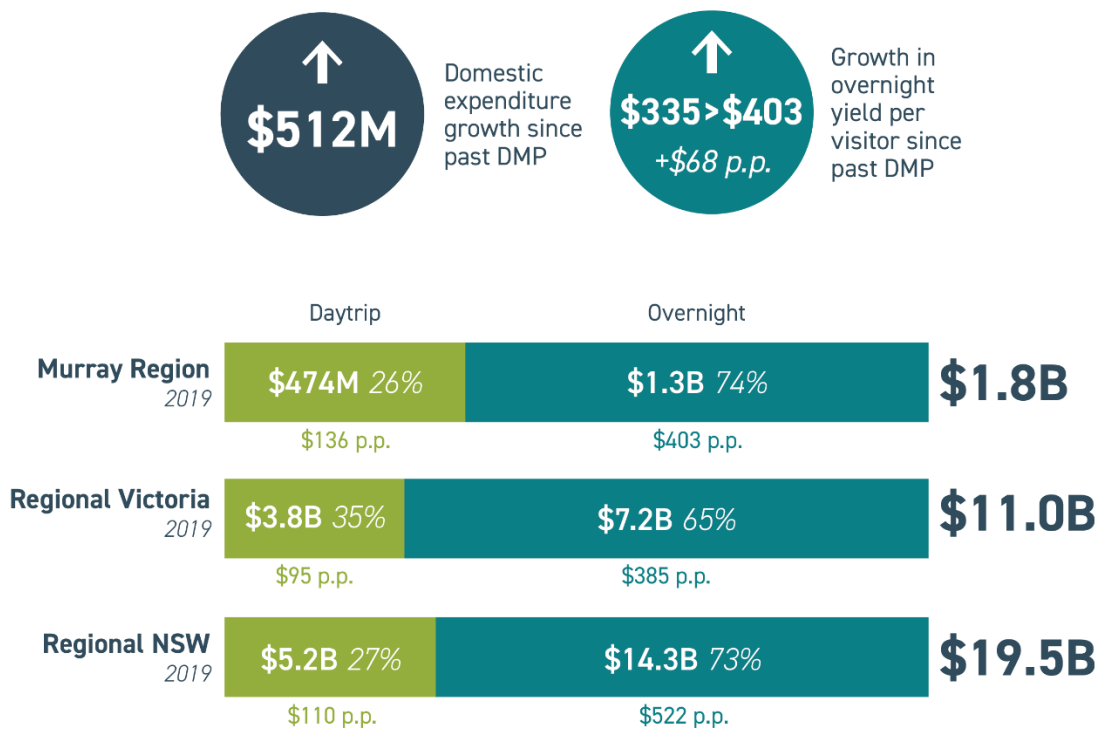
Visitor expenditure in the Murray region has increased by approximately \$512 million since the 2016/17 data captured in the 2017 Destination Management Plan.

Spend per overnight visitor has seen significant growth of \$68 per visitor, reaching \$403 per person in 2019. This demonstrates increased engagement with products and experiences, and additional spend on accommodation.

There remains opportunity to grow overnight visitor yield, in line with average spend for overnight visitors to regional New South Wales (\$522).

Although overall daytrip visitor expenditure has increased, expenditure per person has slightly decreased (from \$143 pp). This highlights lack of new motivating products and experiences for daytrip visitors, resulting in reduced spend opportunities. However, daytrip spend remains higher than regional Victoria and regional New South Wales.

T1. EXPENDITURE TRENDS



Source/s: Tourism Research Australia National Visitor Survey 2017-2021. Spend has been calculated using Tourism Research Australia Local Government Area Profiles. Note: 2016/17 spend numbers have been adjusted to reflected changes in TRA spend methodology, in line with 2021 spend approach. Hence these are not the same as the published spend in the 2017 DMP.

4.2. DOMESTIC VISITOR PROFILE

Visitor Origin

Victorians are the largest source market for the Murray region (68% of daytrip and overnight visitors). This reflects proximity from Metropolitan Melbourne and awareness of the Murray region's destinations.

Victorian daytrip visitors to the Murray region are primarily from regional Victoria (81%), which reflects the role of regional towns and centres in servicing the regional resident population. The majority of Victorian overnight visitors are from metropolitan Melbourne (61%).

A small proportion of overnight visitors to the Murray region are from interstate (14%). There is opportunity to increase visitation from other states, such as South Australia and Queensland, particularly to the destinations of Mildura-Wentworth and Albury Wodonga which have passenger flight services.

Purpose of Visit

Domestic visitors to the Murray region are primarily visiting for holiday and leisure purposes (44%).

A high proportion of visitors to the region are visiting friends and relatives (VFR) (28%). This presents as an opportunity to engage locals to act as ambassadors for the region and local guides to increase awareness and share information about the local products, attractions and experiences.

Business and other reasons account for 26% of visitation to the Murray region. This demonstrates the importance of the region to rural and remote communities in Victoria and NSW for employment, medical and educational purposes.

Activities

Social activities, such as dining out (55%), visiting friends and relatives (33%) and visiting pubs and clubs (17%), are among the most popular activities engaged in by visitors to the Murray region.

In addition to these, visitors are highly engaged with the natural assets within the region through participation in activities including visiting National or State Parks (6%), bushwalking (6%), water activities (4%) and fishing (4%).

Seasonality

Visitation to the Murray region reaches its peak in the summer months, specifically December and January. This is likely to be driven by the visiting friends and relatives (VFR) and holiday markets, who typically visit the region during the school holiday period.

Travel Party

Majority of visitors to the Murray region are travelling with their partner (31%), alone (27%) or with their friends and family with children (19%).

At present, the Murray region attracts a reasonable proportion of family group visitors, however there is opportunity to grow this with delivery of suitable family-friendly attractions and accommodation throughout the region.

Accommodation

A high proportion of overnight visitors are staying in non-commercial accommodation, mostly due to the large VFR market staying at a friends or relatives property (34%), as well as visitors staying at informal camping grounds (11%).

Commercial accommodation accounts for 50% of accommodation stayed in by visitors to the Murray region. This is mainly Hotel/Motor Inn (24%) and Holiday Park (14%) accommodation, which reflects the region's current accommodation supply.

On average, overnight visitors spend approximately 2.9 nights in the Murray region. There is opportunity to encourage growth in length of stay by investing in motivating products and experiences.

Visitor Spend

Spend on accommodation (31%) accounts for the highest proportion of overnight visitor spend.

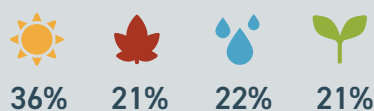
Expenditure patterns of daytrip visitors to the Murray region show a high proportion of visitors engaging in retail shopping (43%). This demonstrates the importance of major regional cities, including Mildura, Albury Wodonga and Echuca Moama, to the broader regional areas of Victoria and NSW.

There is opportunity to increase spend on dining for both daytrip and overnight markets.

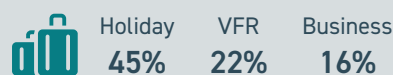
Murray Region Visitor Profile

Murray Region Daytrip Visitors

Seasonality



Purpose of Visit



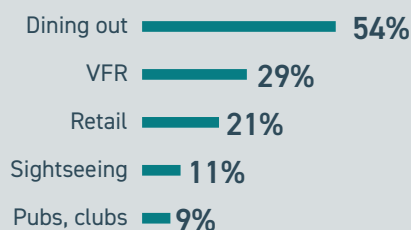
Other
1%



Expenditure

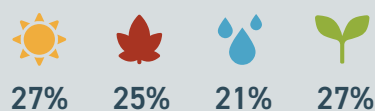


Activities

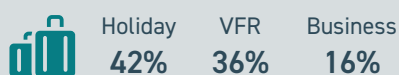


Murray Region Overnight Visitors

Seasonality



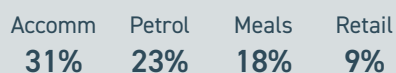
Purpose of Visit



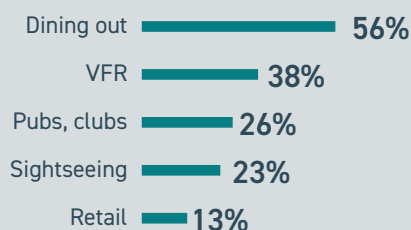
Other
14%



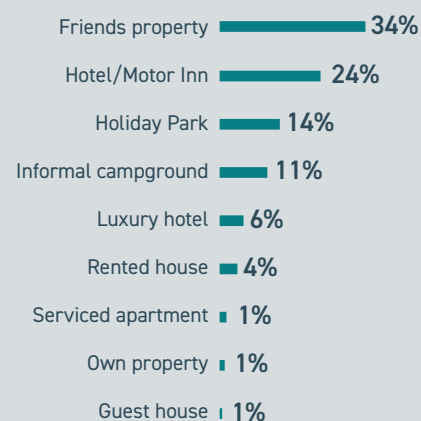
Expenditure



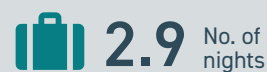
Activities



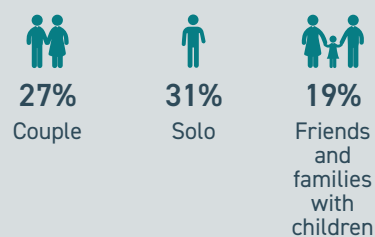
Accommodation stayed in



Average length of stay



Travel party



4.3. FORCES AT PLAY

There are a range of macro-economic trends impacting the visitor economy, as well as regional and local trends. These have been summarised below as they relate to the Murray region.

| | |
|---|---|
| <p style="text-align: center;">COVID-19</p> <p>Travel restrictions due to the COVID-19 pandemic caused a 67% decline in domestic overnight trips between June 2019 / 2020. The visitor economy had yet to recover as of June 2021, with domestic overnight trips still 19% lower than June 2019². The return of travel has been concentrated in the Holiday and VFR segments, in particular from short haul source markets, with a lower level of business travel.</p> <p>Consumer's inability and hesitancy to travel internationally has led to a younger and more diverse domestic visitor market, who have time to travel longer distances and who seek exciting and contemporary tourism products and experiences³.</p> <p>The rise in remote working also provides visitors with more flexibility to travel for more nights and not be constrained by annual leave or public holidays. The ability of destinations to capture these markets will depend on the availability of high speed internet and accommodation with appropriate business facilities.</p> | <p style="text-align: center;">Culturally and linguistically diverse market exploration of regional Victoria</p> <p>The culturally and linguistically diverse (CALD) market is a key growing segment for tourism in Australia. 30% of Victorians are born overseas and there has been a substantial increase in Asian and sub continental origin residents particularly in Melbourne and Sydney over the past two decades.</p> <p>Whilst these groups are diverse in ethnicity and language, many of these have commonalities in their desire to explore Victoria and NSW and have passive nature experiences. It is important that Victorian and NSW destinations understand the needs of this market and support growth in this market segment.</p> <p>Whilst the CALD market is largely a lower yielding segment, over time this is likely to change and the connections made during exploration of Victoria and NSW will lead to future long term repeat visitors.</p> |
| <p style="text-align: center;">Shift towards nature-based visitation</p> <p>Nature based tourism has long been a motivating driver for visitors to explore Victoria and NSW. Growth trends in experiencing nature have outgrown every other activity consumption in Victoria and NSW in the past ten years and since COVID restrictions this has been exacerbated and people's desire to be amongst nature has increased substantially.</p> <p>The Victorian and NSW Government have invested heavily in nature based tourism, particularly in tracks and trails, which supports walking and cycle tourism.</p> <p>The Murray is well placed to leverage from the growing consumption of nature based tourism through strengthening some of its icon National parks such as Mungo, Barmah and Gunbower, and through the delivery and promotion of the Murray River Adventure Trail.</p> | <p style="text-align: center;">Growth in Airbnb</p> <p>Growth in the use of self-contained accommodation, such as Airbnb and Stayz, has outpaced investment in new hotels and motels. In 2017, the number of nights stayed in Airbnb and Stayz in Australia grew 9.6% whilst conventional hotels grew only 5.6%⁴.</p> <p>42% of the Australian market would prefer to stay in self-contained accommodation (Airbnb and Stayz) during a potential future trip to the Murray⁵. Airbnb accommodation provides privacy for guests, who often do not interact with the accommodation operator during their stay. Airbnb is highly suited to families, offering entire homes with kitchen and laundry facilities, allowing visitors to be self-sufficient during their stay. Additionally, compared to other accommodation types, Airbnb accommodation has come to be viewed as a COVID safe alternative.</p> |

² Tourism and Hotel Market Outlook 2021 – Edition 2, Deloitte Access Economics

³ Beyond COVID-19: Rise of Domestic Travel and Tourism in Australia, KPMG, 2021

⁴ Tourism and Hotel Market Outlook, 2018, Deloitte Access Economics

⁵ Murray region Audience Survey, Urban Enterprise 2022. Q23. With this travel party, what type of accommodation would you most prefer to stay at? Select up to three responses. N=2,032.

| | |
|---|--|
| <p>Rise in remote-working and growth in tree-change</p> <p>COVID 19 restrictions have increased the opportunity for workers to have flexibility and 'working' holidays. This is significant as it increases the potential for mid-week travel to the Murray's destinations. High quality internet and provision of WIFI in accommodation is critical for supporting this opportunity.</p> <p>In addition to this COVID has led to an increase in residents relocating from Australian Cities to regional destinations. Tree change brings new residents and ideas to destinations and whilst it may have a negative effect in terms of increasing property values, it is positive in terms of supporting population growth in locations that may be suffering decline and delivering a new workforce and business owners to regions.</p> | <p>Growth in the Experience Economy</p> <p>The Experience Economy is the sale of memorable experiences to customers.</p> <p>Key target markets in Australia such as Lifestyle Leaders have a much greater focus on the experience of destination and are willing to spend on experience over product.</p> <p>Increased consumption of experiences presents an opportunity for the Murray to add substantial yield from visitors.</p> <p>The tourism industry needs to understand the importance of visitor experience consumption and the impact this has on motivating higher yield visitors to a region and providing a positive and satisfying experience.</p> |
| <p>Caravan, camping and nature based</p> <p>Given the shift towards more local, frequent and affordable domestic holidays, caravan and camping travel has become attractive to a more diverse group of visitors, beyond the traditional grey nomad road tripper market segment. As a result, the number of recreational vehicles rose by 16.5% in June 2020, with Australian caravan production reaching a 30 year high in 2021⁶.</p> <p>Nature-based accommodation has also become increasingly popular. This accommodation type is a more 'COVID-safe' option and represents an alternative to traditional accommodation for those seeking a more unique experience.</p> | <p>Holistic wellness</p> <p>Holistic wellness is an approach to physical, mental, and spiritual health that considers the whole person in the pursuit of health, happiness, and spiritual wellness.</p> <p>There is increased interest in Australians in seeking holistic wellness, particularly since the impact of COVID 19 pandemic on mental health.</p> <p>Visiting the Murray region for some is considered important for physical, mental and spiritual health. This theme can be explored further in the DMP.</p> |

⁶ Caravan Industry Association Australia, 2021

4.4. PRODUCT STRENGTHS AND GAP ANALYSIS

The appeal of the Murray region as a tourism destination, and the primary product strengths of the region largely relates to the iconic Murray River, the third longest navigable river in the world and the nature based assets of the region. Many tourism attractions and visitor experiences have been developed to capitalise on the river setting and create authentic visitor experiences that leverage off the rich heritage of Australia's longest river.

Building on work undertaken for the previous Destination Management Plans for MRT, the primary tourism strengths for the Murray region are identified as:

- Water-based experiences associated with the River and waterways, such as fishing, water sports and houseboats/river cruise.
- Food, wine and produce.
- History/heritage.
- Nature based tourism.
- Golf.

The majority of primary strengths are supported through a robust annual events calendar. Signature events that are synonymous with the Murray region continue to drive visitation, particularly through off peak and shoulder periods.

The figure below provides an overview of product strengths of the Murray and key gaps and opportunities that relate to these.

F6. MURRAY REGION KEY PRODUCT STRENGTHS, GAPS AND OPPORTUNITIES

| Product | 2017 DMP | 2022 DMP | Overview | Key gaps and opportunities |
|------------------------|----------|----------------|---|--|
| Water Sports | Primary | Primary | Water sports including water skiing and boating continue to be a primary strength of the Murray, market research shows that the Murray is Victoria's number 1 inland water destination in terms of awareness and preference for visit. | Infrastructure to support river access is needed, there also remains opportunities for secondary destinations and the Murray's lakes such as Lake Hume, Lake Boga and Kerang Lakes to strengthen as water sports hubs. Increasing awareness of water sports destinations also presents opportunities for growth. |
| Food, Wine and Produce | Primary | Primary | The Murray remains a major food producing region in Australia. The primary visitor nodes in the Murray generally have a strong dining and food presence. | There remain gaps in farm gate and access to local produce in the Murray. Food quality and provision in secondary destinations needs improvement to meet market need. There also remains opportunity in ferments and other beverage products. |
| Fishing | Primary | Primary | Fishing is a key motivator of travel to the Murray region and its lakes and waterways present excellent credentials for recreation fisherman. Murray Cod is iconic and has broad appeal domestically and internationally for fisherman. | Improvement to water access will support this sector. In addition, opportunity to hire watercraft and provision of fishing tours in various locations will strengthen this sector. |

| Product | 2017 DMP | 2022 DMP | Overview | Key gaps and opportunities |
|----------------------------|-----------|----------------|---|---|
| Houseboats / River Cruises | Primary | Primary | The Murray is unique for its houseboats and river cruising. Destinations such as Echuca, Yarrawonga and Mildura are well developed in this regard. | The recent Murray Cruising Strategy highlights a range of gaps and opportunities for this sector. Investment in mooring infrastructure and wharves is needed to support growth in river and lake cruising. There are opportunities for multi day cruises and themed cruises across Murray destinations. |
| Golf | Primary | Primary | The Murray is one of Australia's leading golf destinations, the quality of courses and supporting club amenities present a strong proposition for golf groups. | There is opportunity to continue packaging of golf product and the need for further investment in facilities at Golf courses. |
| Festivals and Events | Primary | Primary | The Murray region hosts a number of signature events that draw in thousands of visitors. | There remains opportunity to grow the events calendar, particularly at secondary destinations. Arts, music and culture events present opportunity for attracting off peak visitation to the region. |
| History and Heritage | Primary | Primary | The Murray has extensive post settlement heritage as a result of the transport role the river played in Australia's colonial development. The Port of Echuca, Pioneer Settlement and Bonegilla Migrant Experience are key attractions that appeal to visitors interested in post settlement history. New attractions such as the Depot in Deni are examples of growth in this sector. | There is opportunity to improve heritage streetscapes, reutilise heritage buildings for tourism purposes and also see continued investment in the Murray's heritage precincts such as the Port of Echuca. Focus on utilising heritage a backdrop which can be activated should be a focus. |
| Nature based | Secondary | Primary | In the previous DMP nature based was identified as a secondary strength, however with increased activation through waterway cruises, investment in eco accommodation and new eco tours in the region, nature based tourism can be seen as a primary strength for the Murray. | There remains opportunity for continued strengthening of nature based precincts in the Murray. Working closely with Traditional Owners will lead to the establishment of leading nature based destinations. Mungo, Gunbower and Barmah present opportunities to be icons of the Murray. |

| Product | 2017 DMP | 2022 DMP | Overview | Key gaps and opportunities |
|-------------------------|-----------|------------------|---|---|
| Business Events | Secondary | Secondary | Business events prior to the impact of COVID were important for driving mid-week visitation in primary Murray destinations. | Business events have been impacted significantly by COVID and there is a need for a coordinated effort to grow this sector. Investment in quality and contemporary events facilities in Albury, Echuca and Mildura is needed to strengthen this sector. |
| First Nations | Emerging | Secondary | First Nations tourism was considered as emerging in the previous DMP, however there has been significant growth in this sector in many parts of the Murray. An example is the role of the Yorta Yorta in developing tourism products and tours at Barmah. | This is considered a major opportunity for the Murray. The region has a large First Nations population and many significant cultural heritage sites. A First Nations tourism plan should be considered which considers capacity building and establishment of visitor economy infrastructure and product for this sector. |
| Arts and Culture | Emerging | Secondary | Arts and culture have shifted to a secondary strength, investment in destinations such as Albury Wodonga, Echuca, Swan Hill and Mildura provides a strong proposition for visitors. | Continued investment in art galleries and strengthening of grass roots arts and cultural experiences present opportunities for the region. |

5. POSITIONING THE REGION FOR GROWTH

The following section demonstrates the potential for growth across the Murray region over the next five years.

This has been demonstrated through a range of research, including:

- **Murray Region Consumer Research Project**, which draws on a range of primary research of the Australian market. This includes a survey of a representative sample of 2,000 Australians, a survey of over 1,000 past visitors, and four focus groups with past and potential visitors. These were undertaken in 2022.
- **Accommodation demand modelling undertaken by Urban Enterprise in the Murray Region Accommodation Diversification Gap Analysis Project.**
- **Urban Enterprise modelling of future demand for the Murray region.**

5.1. DESTINATION AWARENESS

AWARENESS OF MURRAY REGION DESTINATIONS

The Australian market have varied awareness of key destinations across the Murray region.

Regional cities, including Albury Wodonga, Mildura and Swan Hill, have the strongest awareness amongst the Australian market. Awareness is aligned with their scale, locations on arterial routes, and their prominence in the public domain, which includes national recognition on weather maps.

Sizeable visitor destinations have considerably lower awareness than expected, such as Yarrawonga-Mulwala (47%) and Echuca-Moama (35%). This can be due to lack of cut through in branding and marketing activities, which can be caused by use of regional brands without a strong connection to place. This is an issue across the Murray region and impacts visitor awareness and understanding of Murray region destinations. MRT has opportunity to lead the development of refreshed destination brands that will have greater cut through in the market.

Smaller towns such as Tocumwal, Cohuna Corowa-Wahgunyah and Koondrook-Barham have low recognition outside the Murray region due to limited product experience, marketing and tourist offerings in those communities.

F7. AWARENESS OF MURRAY REGION DESTINATIONS

| | I have heard the name & have interest in visiting | I have never heard of this place |
|--------------------|---|----------------------------------|
| Albury Wodonga | 29% | 23% |
| Cobram-Barooga | 28% | 43% |
| Cohuna | 21% | 55% |
| Corowa-Wahgunyah | 23% | 50% |
| Deniliquin | 26% | 39% |
| Echuca-Moama | 26% | 35% |
| Holbrook | 23% | 49% |
| Koondrook-Barham | 19% | 60% |
| Kyabram | 22% | 52% |
| Mathoura | 18% | 62% |
| Mildura | 38% | 12% |
| Rushworth | 21% | 54% |
| Rutherglen | 24% | 47% |
| Swan Hill | 36% | 22% |
| Tocumwal | 19% | 55% |
| Wentworth | 31% | 33% |
| Yarrawonga-Mulwala | 23% | 47% |

Source: Murray Region Consumer Research, 2022. Audience survey of 2,000 Australians.

AWARENESS OF NATURE-BASED ASSETS

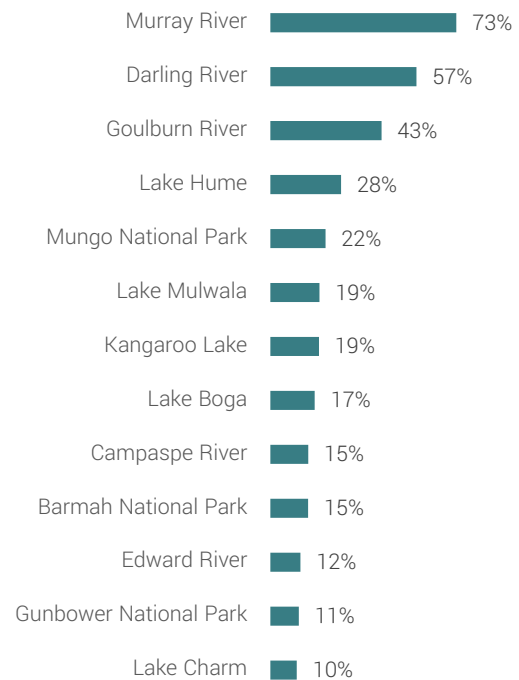
In comparison to other waterways within the Murray region, the Murray River has the highest levels of awareness within a representative sample of the Australian market (73% of the Australian population).

The Murray River has an exceptionally high level of market awareness by Australians and represents a strong brand for the region. Other lakes and national parks however have low levels of awareness.

The Murray region is home to a number of other waterways, most of which are connected to the Murray River. There is significant opportunity for the region to leverage these additional waterways in order to grow demand for water-based visitor experiences, and reduce pressure on the already congested waterway at key hubs.

The Australian population has very low awareness of National Parks in the Murray region, particularly for Barmah National Park (15%) and Gunbower National Park (11%). There is a significant opportunity to leverage the number of National and State Parks with the region to develop enticing tourism products and experiences, including guided tours and experiential accommodation, such as eco-cabins.

F8. AWARENESS OF MURRAY REGION NATURE-BASED ASSETS



Source: Murray Region Consumer Research, 2022. Audience survey of 2,000 Australians.

5.2. AUSTRALIAN MARKET APPEAL OF THE EXISTING MURRAY OFFER

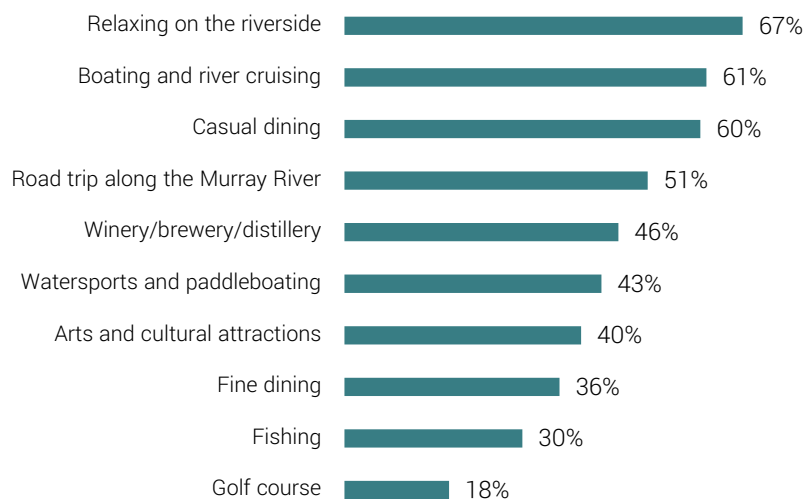
The Australian market were shown a series of images of key experiences available across the Murray region, and asked to select the images that appeal to them as part of a potential future holiday experience.

Passive and relaxation activities had the strongest appeal amongst the audience, such as relaxing by the river, cruising, casual dining and road trips.

High appeal activities highlight the importance of delivering both active and passive experiences on and adjacent to the Murray River, its tributaries and lakes. These activities also reinforce the importance of the region's waterways in providing a high amenity experience for visitors, and is a unique point of difference for the region that should be leveraged.

In addition, demand for casual dining and wineries, breweries and distilleries highlights the need for the region to keep delivering high quality food experiences that meet market expectations and keep pace with competing destinations.

F9. MARKET APPEAL OF MURRAY EXPERIENCES



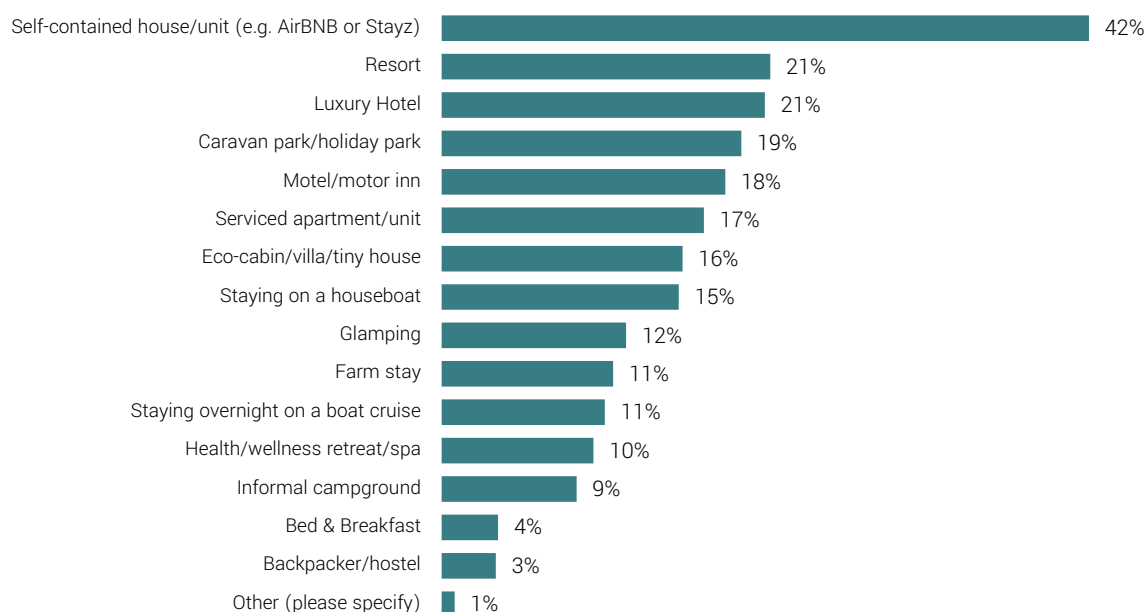
Source: Murray Region Consumer Research, 2022. Audience survey of 2,000 Australians.

5.3. MARKET DEMAND FOR ACCOMMODATION

Market research undertaken demonstrates that the wider Australian visitor market highly values quality accommodation, with over half of all survey respondents indicating their preferred holiday experience in the Murray involves relaxing in beautiful accommodation.

As a defining factor of the visitor experience, expanding and diversifying the accommodation offer is essential for growing the Murray region. Key accommodation preferences include self-contained, resort, and luxury hotels. Resorts and luxury hotels are in low supply in the region, demonstrating a gap in supply.

F10. MARKET DEMAND FOR ACCOMMODATION



Source: Murray Region Consumer Research, 2022. Audience survey of 2,000 Australians.

Projected Future Accommodation Needs, 2022-2032

Forecast accommodation needs have been calculated in the Murray Region Accommodation Diversification Gap Analysis Project (2022).






These were based on the projected growth of visitors staying in paid accommodation across the region, and visitor data from the Tourism Research Australia National Visitor Survey data and primary research. The assumptions were prepared at a granular level for subregions across the Murray region to reflect the unique local conditions and demand across the region.

Based on the analysis, future additional accommodation needs for the Murray region by 2032 is between an additional 2,500 and 3,800 rooms. It is assumed that the midpoint scenario of 3,000 rooms provides the most accurate reflection of accommodation need for the Murray region.

KEY INVESTMENT TARGETS

Key accommodation typologies for future investment in the Murray region are outlined below. These opportunities have been identified through the accommodation gap analysis, market research, engagement with investors and benchmarking with other regions.

The below guide should be used for investors and decision makers and provides an outline of the potential scale and type of investment suited to the region.

| | | |
|---|--|--|
| Large-Scale Hotel with Conference Centre | Large luxury hotel offering 160 rooms and a conference centre for up to 300 guests, accommodating the business events, weekend escape and VFR markets. Facilities offered would include a rooftop swimming pool, restaurant, bar and gymnasium. |  <p>RACV, Torquay</p> |
| Sprawling Resort | Sprawling luxury resort in a landscaped setting with rural and/or river views, positioned towards the holiday/leisure and family markets. Accommodation offering should include resort-style rooftop pool and bar, restaurant and bar, as well as recreation facilities, including gymnasium, tennis courts and a kids club. |  <p>Peppers Salt Resort and Spa, Kingscliff</p> |
| High End Boutique Hotel | 5-star boutique hotel, targeted towards the indulgence and high-end market, including a small number of bespoke, artist-curated rooms, in addition to a day spa and fine dining restaurant. |  <p>Circa 1928, Albury</p> |
| Holiday Park | Large-scale holiday park offering low-cost options, glamping and eco-tourism. Ideally located in a nature-based setting, offering a wide-range of recreational facilities that appeal to the family market. |  <p>Big 4, Deniliquin</p> |
| Serviced Hotel Apartment | Serviced apartment/hotel apartment with studio and 1,2, and 3 bedroom self-contained offering, suiting the needs of business, VFR and family/large-group markets. |  <p>Quest, Echuca</p> |

5.4. TARGET MARKETS

The domestic visitor market for the Murray region accounts for 5.1 million Australians, or 34% of the Australian population aged between 18 and 75.

The market represents those who regularly travel (i.e. at least once every two years) and are interested in visiting the Murray in future.

The Murray region market is split into five distinct market segments, which are depicted below. It will be important to target each market with products and experiences relevant to their preferences and interests.






Common preferences amongst all market segments is engaging with nature, food and wine experiences and relaxing in beautiful accommodation. The shift in the wider Australian market towards these holiday experiences creates a major opportunity for the Murray region to attract these market segments.

The Murray Habituals and Back to Basics market segments are the key existing markets for the Murray region. They are already attracted to the region and satisfied with the product offering. The Destination Management Plan needs to consider how to extract more yield from this market.

In particular, there is a major opportunity to target the Explorer and Discoverer market; being the largest market who are most open to trying new experiences. In addition, the Luxury Traveller presents a key yield opportunity for the region if targeted with high quality and boutique experiences, including resort and hotel accommodation, contemporary and diverse dining experiences, overnight cruises and day cruises, as well as retail and a vibrant night time economy.

Further detailed analysis of target market segments has been provided through the Murray Region Consumer Research Project.

F11. MURRAY REGION MARKET SEGMENTS

| | | Murray Habituals 38% 1.93 Million | Back to Basics 8% 0.43 Million | Road Trip 8% 0.40 Million | Explorer & Discoverer 35% 1.78 Million | Luxury Travellers 10% 0.52 Million |
|---|----------|--|---|--|---|--|
| Proportion of Murray Region Target Market | |  |  |  |  |  |
| | Overview | The traditional Murray visitor who travels to the Murray at least once every two years - the Murray's biggest advocate. | The simple traveller, the free spirit - escaping to nature to press pause on real life, spend time with loved ones, and hit reset. | Inspired by the freedom of a road trip, this market wants to explore the country, see new destinations and escape the city. | Socially conscious and adventurous travellers, open to travelling to new destinations and seeking new, unique experiences. | With a holiday mindset of indulgence, the luxury traveller seeks relaxation achieved through high quality experiences. |
| Who they are | | <ul style="list-style-type: none"> • All ages and travel groups. • Large friend/relative group travel. • Mostly VIC (51%) and NSW (26%). • Self-sufficient travellers. • Stay for long trips during peak periods. | <ul style="list-style-type: none"> • Mostly 40-60 years old without children or with adult children. • Preference for longer stays at any time of year (49%). | <ul style="list-style-type: none"> • Mostly NSW (31%) and VIC (22%), high proportion born overseas. • Take longer trips less frequently. • Young couples, friends, families with older children, grey nomads. | <ul style="list-style-type: none"> • Young families and singles, mostly aged 18-40 years old. • Middle income earners. • Travel on weekends and more frequently throughout the year. | <ul style="list-style-type: none"> • Mostly older travellers, predominately adult couples. • Higher income. • Likely to travel midweek or any time of year. |
| | | | | | | |

5.5. COMPETITIVE POSITIONING

The Murray region is at its heart a destination of spectacular waterways, that can be experienced however the visitor desires.

The longest river in Australia, the Murray River, flows more than 2,500km, weaving through spectacular national parks where Australia's most iconic native animals live amongst untouched bushland.

When prompted as to which of the options in the chart below best describes the Murray region experience, the Australian market had the highest association with cruising the Murray River by boat. The expectation of accessing the Murray River by boat, highlights the potential for cruising as a driver of future visitation that will deliver high engagement rates.

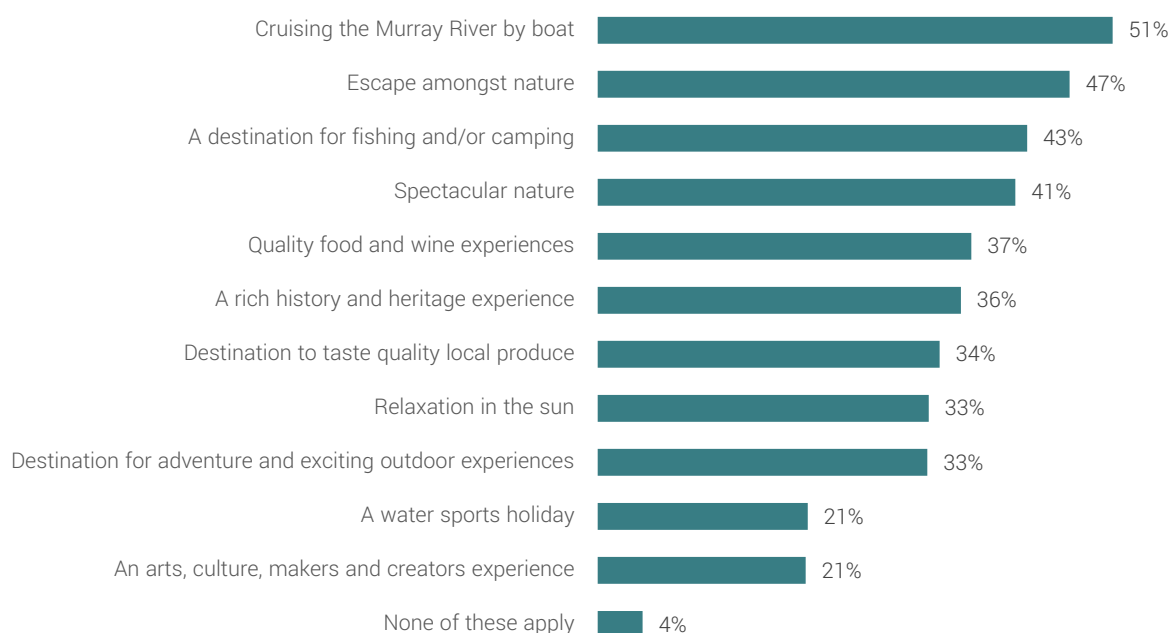
The Murray region needs to own waterway cruising and waterway experiences. Focusing on the ease and luxury of waterway experiences is a unique point of difference for the Murray region. Other regions own wine, coastal experiences, snow or cycling. They have used these competitive strengths to grow awareness and demand for their products and experiences, and generate cut through in the market. The Murray region has the potential to do the same.

Beyond cruising, nature based experiences are the most associated with the Murray, with key associations including the notion of an escape amongst nature, a destination for fishing and camping, and spectacular nature.

There is opportunity to build the perception of the Murray region as a destination for quality food and wine, leveraging the high quality and diversity of local produce, as well as strengthening the region's presence in the arts and culture space.

Focus groups with past and potential visitors showed interstate visitors perceived the Murray region as a food produce destination and had expectation of this being part of the Murray experience (e.g. Murray River branded produce). The disconnect between this expectation and the current offering in a number of destinations presents an opportunity for growth.

Demand for Murray Region Experiences and Expectation of visitors



Source: Murray Region Consumer Research, 2022. Audience survey of 2,000 Australians.

5.6. THE MURRAY BRAND

The Murray. **Because the best things in life are better when they're shared.**

At present, the key brand messaging is based on the pillars from the 2017 Destination Management Plan. This includes:

- The Murray.
- The River.
- Natural Landscapes.
- Golf.
- Food and Drink.
- Arts, Heritage and Culture.

The focus on such a large number of themes dilutes the Murray brand message. This was reinforced by the consumer research, which highlighted the lack of clarity and awareness regarding Murray region destinations and assets.

The consumer research however, highlighted the key associations the Australian market have with the Murray region, and the experience they expect from a visit to the region. Those experience expectations should inform the brand message and key pillars, which should include:

- Cruising and waterways.
- Nature.
- Food wine and produce.
- Culture and heritage.

In addition, renewed branding should be explored to ensure the region appears contemporary and innovative in a competitive domestic tourism environment.

Current Murray Brand and Logo



Current Murray Persona

Our Essence:

Legendary River Stories Worth Sharing

Our Voice:

The Charismatic Storyteller

Our Tone:

Authentic › Emotive › Inspiring › Adventurous › Energised › Connected

Our Personality:

Open-handed
Welcoming hospitality that is heartfelt and honest.

Resilient
Hardworking locals delivering remarkable experiences.

Intrepid
A sense of adventure and discovery.

Balanced
A land of contrasts, cities straddle ancient moonscapes.

Our Values:

Candour
It's through the eyes of the locals The Murray truly comes alive, as we welcome explorers to our home. We're a friendly bunch, with plenty of laid back country charm and an adventure at every turn. The hospitality is warm and inviting, just like sharing memories with friends.

Prosperity
The Murray is a remarkable region, rich with produce, breathtaking natural beauty and a history that's always in the making. Filled with an entrepreneurial spirit and a sense of adventure, the local families work hard to create memorable experiences that last for generations.

Sharing
The Murray is best shared. Our doors are always open, our dinner plates are generously piled and we enthusiastically provide insider tips on how to find that place just for you.

5.7. FORECAST MURRAY REGION GROWTH

Visitation projections forecast an increase in 1.8 million visitors to the Murray region in the 5 years to 2027, with visitation expected to reach 8.5 million per annum by 2027.

The figure below provides forecast visitation for the Murray region. This is based on Tourism Research Australia data for the 2019 calendar year, which has been used as the 2022 data point to demonstrate a business as usual scenario, taking into account the impacts of COVID-19 in 2020 and 2021. Visitation is expected to resume to 2019 levels in 2022⁷.

The scenarios presented in the figure below apply the historic average annual visitation growth rate of each of the following regions:

- Murray Region (3.8% daytrip, 4.2% overnight and 5.9% international).
- Regional NSW (4.4% daytrip, 4.2% overnight, and 4.4% international).
- Regional Victoria (5.9% daytrip, 5.5% overnight and 6.5% international).

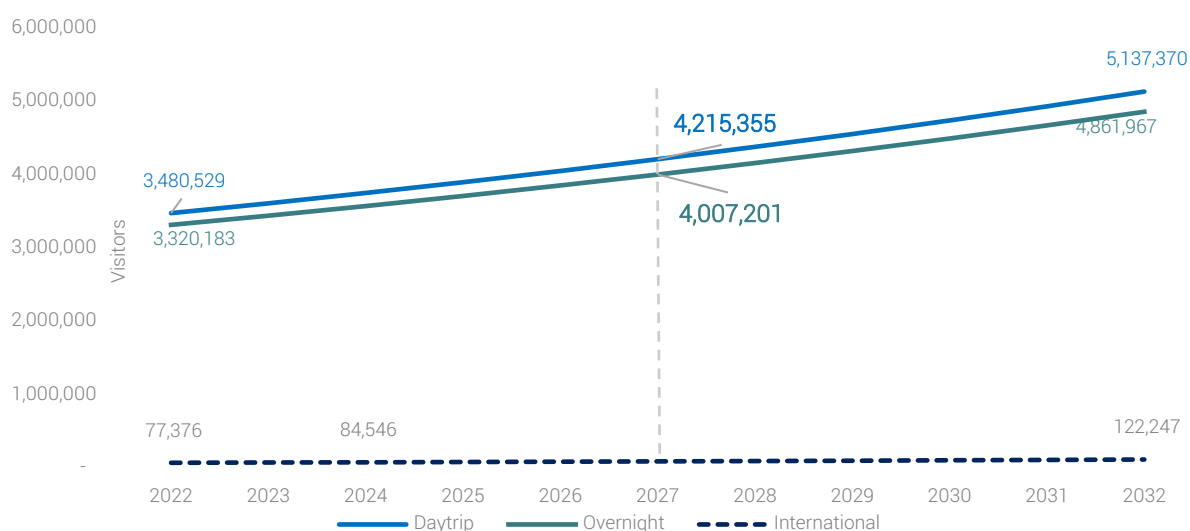
The trends observed in these regions provide insight into how visitation to the Murray could advance in future. The midpoint scenario of these growth rates has been adopted as the projected rate of visitation growth for the Murray region.

Based on historic growth scenarios, the same destinations are likely to continue to grow.

There is a need to focus growth in destinations that have experienced low visitation growth, by encouraging visitor dispersal throughout the region and marketing new visitor destinations.

Forecast growth does not take into account macro-economic impacts such as recession and cost of living pressures impacting on leisure travel.

F12. VISITATION PROJECTIONS



Source: Urban Enterprise forecasting, based on Tourism Research Australia data, using 2019 calendar year as a business as usual scenario for the year 2023.

⁷ Tourism and Hotel Industry Outlook 2021 -Edition 2, Deloitte Access Economics

6. STRATEGY

6.1. VISION

The Murray region is recognised as Australia's premier inland destination to experience waterways, abundant nature and rich culture.

6.2. OBJECTIVES

The following objectives have been identified to drive the development of the Murray region.

1. Drive regional dispersal and exploration of the region to strengthen emerging destinations and yield.
2. Promote sustainable approaches to tourism with consideration of economic viability, environmental protection and social equity.
3. Support First Nations led development and delivery of tourism experiences.
4. Facilitate partnerships to develop cohesive cross border destinations and identities.
5. Encourage year round visitation growth to support business sustainability.
6. Encourage the development of motivating products and experiences to attract new markets and grow yield from existing markets.

6.3. STRATEGIC PILLARS

Six strategic pillars have been identified for the Destination Management Plan. These are the focus areas that will enable the Murray region to reach the above vision and objectives.

The themes/pillars identified respond to unique needs and opportunities for the Murray region, building on themes and priorities of the past Murray Region Destination Management Plan 2018-23. In addition, this aligns to the New South Wales Visitor Economy Plan 2030 and Victorian Masterplan Directions Paper.

Murray Region Destination Management Plan Strategic Pillars

| Activate waterways | Invest in icons | Create vibrant destinations |
|---|--|--|
| Embed waterway cruising and activation into the region as the number one way to experience the Murray. | Establish icon assets that drive demand, improve awareness and facilitate destination growth. | Create complete and compelling destinations through investment in amenities, activations and food and beverage. |
| Elevate First Nations experiences | Drive demand | Build capacity and facilitate growth |
| Support Traditional Owners to lead the development of products and experiences that connect visitors to First Nations cultures. | Invest in demand driving initiatives and activities which motivate and grow visitation to the Murray region and attract new markets. | Facilitate visitation growth to the Murray region through investment in infrastructure, marketing and visitor servicing, and industry support and development. |

6.4. PROJECT PRIORITY FRAMEWORK

A set of five assessment criteria were developed to identify priority projects for the Murray Region Destination Management Plan. These include:

1. **Perceptions.** Positively influence the perception of the Murray region as a significant tourism destination.
2. **Visitation and Yield.** Increase visitation and expenditure in the region.
3. **Sustainability.** Have a high probability of implementation and be sustainable over the long term.
4. **Further Development.** Have flow-on benefits that will lead to other development opportunities.
5. **Dispersal.** Draw visitors outside of peak periods, and/or increases visitor dispersal throughout the region.

Projects have been assessed against the above project priority framework, which has resulted in the identification of regional priority projects.

Regional Priority Project

A range of major projects have been identified under each strategic pillar. These are of a large scale, provide new assets to the region and will have a significant impact on overnight visitation and best meet the objectives of the Destination Management Plan.

The role of the Destination Management Plan is to deliver and advocate for projects that will provide significant benefits to the Murray region visitor economy. As such, only major projects have been identified in this Destination Management Plan, to ensure MRT resources are focused and effective.

Other Projects (not specified in this DMP)

Due to the scale of the region, there are a number of additional projects that are important to a specific destination or locality.

Whilst priority projects for a destination may relate to the pillars for the Murray region, these have not been listed in this Destination Management Plan. It will be the role of MRT to support and advocate for these projects, where they align to the strategic objectives and direction for the Murray, as well as to monitor and facilitate investment projects across the region as appropriate to the Murray Regional Tourism Board remit.

7. PRIORITY PROJECTS

T2. SUMMARY OF PRIORITY PROJECTS

| Activate waterways | Invest in icons | Create vibrant destinations |
|---|---|--|
| <ul style="list-style-type: none"> Facilitate Cruising Investment Experiences Water Access Infrastructure Paddlesports Hub Waterfront Activations Waterway Regulatory Advocacy Supporting Cruising Industry Development | <ul style="list-style-type: none"> Murray River Adventure Trail Delivery Murray Esplanade and Port of Echuca Masterplan Refresh and Implementation Mungo National Park Tourism Investment Masterplan and Business Case Gunbower National Park Investment Masterplan and Business Case Barmah National Park Investment Masterplan and Business Case Albury Wodonga Cultural Destination Murray Water Theme Park | <ul style="list-style-type: none"> Murray Small Towns Streetscape and Activity Centre Enhancements Project Murray Destinations Gateway Project Food Enhancement in Small Towns Revitalising Swan Hill CBD Night Time Activation |
| Elevate First Nations experience | Drive demand | Build capacity and facilitate growth |
| <ul style="list-style-type: none"> Murray Region First Nations Experience Development Plan and Promotion Lake Mulwala Aboriginal Cultural Centre Cultural Centre, Powerhouse Precinct, Mildura Riverfront | <ul style="list-style-type: none"> Invest in World Class Motivational Visitor Accommodation Existing Accommodation Refurbishment – Motels and Holiday Parks Murray Region Brand Strategy and Implementation Murray Region Online Bookable Product and Packaging Murray River Road Drive Tourism Strategy and Implementation Murray Signature Arts and Cultural Events Program | <ul style="list-style-type: none"> Regional Workforce Pathways and Promotion Program, and Skills Development Plan Temporary Workforce Accommodation Model Cross Border Research Murray Regional Tourism Industry Leadership Program Murray Region Local Ambassador Project Visitor Information Services Review and Delivery Transport and Infrastructure Enhancement Advocacy |

PILLAR 1: ACTIVATE WATERWAYS

OVERVIEW

Embed waterway cruising and activation into the region as the number one way to experience the Murray.

The overwhelming key driver for holiday leisure visitors to the Murray region relates to experiencing the Murray River, lakes and tributary rivers. Whether it's active experiences on the region's waterways such as water-skiing or passive experiences such as cruising and swimming, it is critical these activities are well supported through infrastructure, private sector businesses and visitor services.

Many of the projects below have been identified through the Cruising the Murray Strategic Plan which provides direction on projects for enhancing the cruising and activity on waterways across the Murray region.

The Murray Region Cruising Strategy, 2022 should be reviewed for further detail regarding each project.

REGIONAL PRIORITY PROJECTS

Facilitate Cruising Investment Experiences

There is a major opportunity to elevate the cruising experience for visitors to the Murray region. A range of cruising opportunities have been identified within the Murray Region Cruising Strategy. Priority projects for cruising are identified below.

Key multiday cruise opportunities include:

- Echuca Multi-day Paddle Steamer Cruises.
- Mildura Multiday cruise experience.
- Multi-day Canoe Trail.
- Mighty Murray to Mungo Iconic Tour.
- Yarrawonga – Corowa Whiskey and Wine Multi-day Winery Cruise.

Key day cruise opportunities include:

- Lakes Restaurant Cruise (Lake Hume and Lake Mulwala).
- Winery and Nature Cruise.
- Locations: Yarrawonga to Corowa and Bundalong.
- Lake Mulwala Nightlife Boat Cruise.
- Cobram to Tocumwal Beaches Cruise.
- Foraging Food Cruise.
- Enabling the Wetlander Cruise.
- Fishing Tours.

Next Steps

- Work with existing cruising operators to elevate existing product offering and address barriers to investment and growth in operations.

- Council and stakeholders to facilitate cruising investment in new experiences.

Water Access Infrastructure

Mooring infrastructure, in the form of wharves, marinas and temporary mooring points, is required at various locations across the region to support an increase in commercial cruising.

This will improve access to the waterfront for commercial vessels and passengers, and remove one of the current major barriers to cruising.

Key water access infrastructure requirements include:

- Wharves and temporary mooring points.
- House boat moorings and marinas.
- Weir at Swan Hill.

Next Steps

- MRT to support Councils to identify specific locations for wharves, pontoons and temporary mooring points to service the existing market.
- Council to deliver infrastructure at identified locations within their remit, and liaise with State Government agencies needed to deliver other mooring infrastructure.

Paddlesports Hubs

The amenity and infrastructure at key paddle sports access points requires significant improvement to improve the visitor experience.

There is an opportunity for private sector activation in Paddle sport hubs. This would involve the establishment of a business model for paddle sports, involving equipment hire and guided tours. These hubs could also include a food and beverage offering or other forms of boat hire.

Priority paddle sport hub locations include:

- Mildura, Mildura Riverfront.
- Swan Hill, Riverfront at The Ten Steps.
- Koondrook, nearby Koondrook Wharf.
- Kerang Lakes, Lake Boga (nearby Lake Boga Yacht Club).
- Cohuna, Cohuna Beach.
- Deniliquin, Mcleans Beach.
- Echuca, Onion Patch.
- Tocumwal, Tocumwal Foreshore.
- Cobram, Thompsons Beach.
- Corowa, Corowa Rowing Club.
- Yarrawonga, Yarrawonga Foreshore Reserve.
- Albury Riverfront, Noreuil Park Foreshore, Riverside Precinct.
- Lake Hume, Lake Hume Village.

Next Steps

- MRT to develop a Paddlesports Hub model that can be delivered across the region.
- Promote the opportunity to investors and liaise with Councils to support delivery of the Paddlesports hubs.

Waterfront Activations

High amenity waterfront parkland and commercial activation is critical to the success of cruising and building visitor demand.

A number of destinations within the region have already developed waterfront masterplans, which have been successful in connecting the towns with the riverfront. Many of these need continued delivery, such as Albury, Mildura and Swan Hill.

Key destinations that require waterfront masterplans and activation strategies include:

- Echuca-Moama (Bridge to Bridge Masterplan).
- Lake Mulwala Waterfront Masterplan.
- Deniliquin Waterfront Activation Precinct.
- Corowa-Wagunyah Waterfront Masterplan.

There is a need for a range of upgrades at these destinations, including:

- Streetscaping and landscaping.
- Consistent signage and interpretation.
- Waterfront shared trail.
- Governance and management of waterway activity including consideration of infrastructure required to improve water-based experience, such as marinas; moorings and safe boat parking.

These upgrades will support access to the Murray River and other waterways through the development of waterfront amenities and infrastructure for commercial vessels, passengers and visitors and residents who use the waterfront for recreation.

Next Steps

- Promote the opportunity for Councils to consider master planning of existing water access points and waterway operations.

Waterway Regulatory Advocacy

Establishment of a new cruise business, as well as operation of and investment in existing businesses, can be hindered by the complex governance system that requires navigation. The array of government agencies and stakeholders involved in the process, from vessel regulations to mooring licences and operating permit approvals, can be a major deterrent for cruising operators.

In order to enable cruising as the hero experience of the Murray region, a streamlined and enhanced Cruising Approvals system is required to ensure investors are able to easily navigate the system and to reduce the number of authorities an investor needs to directly liaise with. This may occur through changes in authority roles to reduce the number of authorities required in the process, establishment of a new branch of an existing authority, or establishment of an independent organisation to manage the approval process.

In addition, there is a need for policy changes to allow for increased houseboats on Lake Mulwala and the introduction of houseboats on Lake Hume.

Next Steps

- MRT to work with private operators, Councils and other relevant agencies to identify potential regulatory changes that would support expanded business operations.
- MRT to undertake cruising governance review and model.
- MRT to undertake a feasibility study and advocacy document to support policy changes to allow houseboat operation at locations such as Lake Hume and Lake Mulwala.

Supporting Cruising Industry Development

There are a range of industry training, skills and digital needs required to support the development of the cruising industry.

MRT has a role to play in facilitating cruising through industry capacity building, including digital education and training, provision of cruising marketing and visitor information, investment guidelines, and workforce development.

Opportunities identified within the Murray Region Cruising Strategy include:

- Cruising The Murray Digital Activation Program.
- Establish Cruising the Murray industry website.
- Embed cruising into marketing plan.
- Guide to investment in cruising for current and new operators.
- Cruising Workforce Development Strategy and Implementation.

Next steps

- Deliver the above projects, as per the respective projects and actions in the Murray Region Cruising Strategy.

PILLAR 2: INVEST IN ICONS

OVERVIEW

Establish icon assets that drive demand, improve awareness and facilitate destination growth.

The Murray is an expansive tourism region which includes 13 Local Governments, more than 30 towns and smaller destinations, more than 20 National Parks and State Forests, and more than 10 individual water bodies that support tourism activity. The expansiveness of the region makes it difficult to provide clear messaging around the key assets and product that will motivate visitors to the Murray.

There are a number of assets in the region that have unique qualities and scale that can be elevated as icons of the Murray. These assets include the Murray River itself, the Port of Echuca, Mungo National Park, Gunbower National Park and Barham National Park. These assets provide the setting for nature based, heritage and First Nations experiences that will be a key focus for product development of the Murray region in the next 10 years.

REGIONAL PRIORITY PROJECTS

Murray River Adventure Trail Delivery

The Murray River Adventure Trail has been a long standing delivery priority for Murray Regional Tourism.

The project includes trail delivery across the length of the Murray region combined with paddle sports opportunities.

A concept plan and business case was prepared a number of years ago and segments are being delivered when funding is made available through Federal, State and Local Government.

In order to continue progression of the trail, MRT needs to continue its effort in advocacy and coordination of delivery.

MRT should consider undertaking a broader trails strategy that links to the Murray River Adventure Trail which will re-analyse the adventure trail, prioritise sections of the proposed trail, and identify new trail opportunities.

Next Steps:

- MRT to consider the resourcing and tracking delivery of the trail through development of an online GIS resource. GIS mapping will ensure all stakeholders understand which segments have been delivered and the next steps required.
- MRT should consider undertaking a broader trails strategy that links to the Murray River Adventure Trail that re-analyses and prioritises sections of the trail and new trail opportunities.

Murray Esplanade and Port of Echuca Masterplan Refresh and Implementation

The Port of Echuca has long been one of the Murray region's premier tourism attractions.

Substantial investment has been delivered in the Port including an upgrade of the Wharf itself and new discovery centre building. Additional investment has been made in the riverboat dock and the broader precinct amenity.

There is a need however, to focus attention on creating vibrancy in the precinct through private sector activation. New high quality visitor accommodation, riverfront food and beverage facilities, paddle sports hub, an increase in events and festivals and further utilisation of heritage buildings will be essential to achieve the potential of this site.

The precinct needs to become the hub for water based and heritage experiences and be a drawcard for visitors and residents alike. It is critical the community embraces the Port of Echuca.

Next Steps

- Develop a Bridge to Bridge Masterplan that considers water activation and use, moorings and cruising opportunities.
- Unlock land assets to support private investment in visitor accommodation, tours and food and beverage.

Mungo National Park Tourism Investment Masterplan and Business Case

Mungo National Park is already establishing itself as an iconic nature and heritage asset in Australia, attracting a growing number of visitors.

Engagement with Traditional Owners should be undertaken to understand their desired strategic direction for the Park, and appetite for tourism investment and improved visitor access.

Should Traditional Owners allow further visitor access into Mungo National Park, consideration should be given to the enabling infrastructure and facilities to support the visitor economy. This may include:

- Delivery of an all-weather road to Mungo National Park to ensure year-round access.
- Expansion of guided touring.
- Visitor information and wayfinding.
- Inclusion in MRT branding activities.

A tourism focused masterplan and business case is would support activation of this unique nature based attraction.

Next Steps

- Undertake preliminary engagements with Traditional Owners, Registered Aboriginal Parties and Local Aboriginal Land Councils.
- In conjunction with Traditional Owners deliver a masterplan and business case to support the enhancement of Mungo National Park.

Gunbower National Park Investment Masterplan and Business Case

Gunbower Island and surrounding State Forest and National Park has potential to establish itself as one of the Murray's iconic nature based attractions. The wetlands, flora and fauna of the region is world leading and there is extensive opportunity to enhance the area into one of Victoria's eco tourism icons.

Undertake a detailed nature based activation plan for the Gunbower Island that considers development of tracks and trails, cycling loops, wildlife watching, tours, aboriginal cultural heritage experiences and expanded visitor accommodation offering in surrounding land.

Next Steps

- Undertake preliminary engagements with Traditional Owners, Registered Aboriginal Parties and Local Aboriginal Land Councils.
- In conjunction with Traditional Owners, deliver a masterplan and business case.
- Attract funding for delivery.

Barmah National Park Investment Masterplan and Business Case

Support Yorta Yorta Nation Aboriginal Corporation (YYNAC) to develop a masterplan and business case to support the enhancement of Barmah National Park.

Through this investment, consider the following:

- Touring and transport links to Echuca-Moama.
- Cruising links from Echuca-Moama.
- Potential to develop and expand the Kingfisher Cruise to be the iconic Barmah National Park experience.
- New and expanded guided tours, both on-land and on water.
- Cultural heritage tours integrated with on-land experiences.

Next Steps

- Undertake preliminary engagements with Traditional Owners, Registered Aboriginal Parties and Local Aboriginal Land Councils.
- Consult with Yorta Yorta to lead development of tourism masterplan, with support from MRT and Parks Victoria.

Albury Wodonga Cultural Destination

Albury Wodonga is the number one cultural and entertainment destination of the Murray Region, with a wealth of assets such as the MAMA precinct, Hyphen Gallery and Gateway Island. There is a need to continue investment in the cultural provision of the destination to ensure it remains at the forefront of culture, design and innovation.

Investment required in the destination includes:

- Albury Entertainment Centre Convention Wing Redevelopment.
- Delivery of Gateway Island Masterplan.
- Further development of Bonegilla Migrant Experience Centre Strategic Plan.
- First Nations experiences, including the Burraja, Indigenous Cultural and Environmental Discovery Centre.
- Delivery of a cultural events calendar.

Next Steps

- Support Councils to advocate for funding to delivery priority cultural projects.
- Promote Albury Wodonga as a cultural destination within the Murray Region.

Murray Water Theme Park

Delivery of a new major theme park focused on water experiences provides an opportunity to leverage the Murray region's competitive advantage in waterways and water experiences, drive demand for new visitation, and grow destination awareness.

There is potential for this to be located either near Mildura-Wentworth, leveraging the weather and milder winters, or between Echuca-Moama and Yarrawonga-Mulwala to leverage proximity to Melbourne and draw on the scale of the existing visitor base.

Next Steps

- MRT to promote opportunity to investors and work with Councils to investigate site opportunities.
- Relevant Councils could consider identifying suitable sites for private investment and identifying the necessary regulatory processes.
- MRT to consider the need to advocate for regulatory reform to support development.

PILLAR 3: CREATE VIBRANT DESTINATIONS

OVERVIEW

Create complete and compelling destinations through investment in amenity, activations and food and beverage.

The Murray region has five primary destinations identified as Albury Wodonga, Yarrawonga Mulwala, Echuca Moama, Swan Hill and Mildura Wentworth. These destinations capture a large proportion of visitation to the region and are well developed in terms of their product offer, food and dining experiences and visitor accommodation provision. In addition to this there are many emerging small towns within the Murray that have potential to strengthen their tourism credentials through further investment and positioning.

Improving the amenity and vibrancy of the Murray's towns and small towns should be a priority for the Destination Management Plan over the next 5 years in order to create a compelling visitor experience. In some of the primary destinations, improvement to streetscapes and gateways needs to be a focus for investment, whilst in the smaller towns of the Murray enhancement of streetscapes and riverfront precincts should be a priority.

REGIONAL PRIORITY PROJECTS

Murray Small Towns Streetscape and Activity Centre Enhancements Project

The Murray's small towns present opportunity to attract and absorb additional visitation growth to the region. As towns, such as Echuca and Yarrawonga, are at capacity in the summer peak, there is opportunity to encourage visitor dispersal to other smaller towns across the Murray.

Many of the Murray's smaller towns need further investment in town centre amenity, streetscapes and shared trails, and riverfront precincts.

Next Steps

- Advocate for investment in township amenity across the Murray's smaller towns.

Murray Destinations Gateway Project

Touring the Murray is identified as a key priority for MRT. Whilst there is a requirement for improved visitor services to support this, there is also a need for enhancement of township gateways, particularly those along the Murray Valley Highway.

Echuca, Yarrawonga, Swan Hill, Yarrawonga and Cobram are all examples of key destinations that have poor gateway experiences for visitors entering each destination and do not provide a sense of arrival into a high amenity destination.

The amenity of the Murray Valley Highway needs review in order to present towns that look and feel like visitor destinations. Streetscaping, plantings and improved public space are needed to create higher amenity for visitors and residents alike.

Next Steps

- MRT to work closely with key local governments and VicRoads to identify opportunities to improve gateway amenity.

Food Enhancement in Small Towns

Delivery of contemporary and consistency of high quality food experiences is a critical aspect of the visitor experience, and significantly impacts visitor satisfaction.

The quality and diversity of food experiences across the region is highly varied at present. There is need for a range of new investments in food and beverage across the region to meet contemporary visitor standards.

- Floating restaurants and cafes.
- Waterfront dining.
- Pop-up food and beverage on waterfronts.
- Breweries, distilleries and wineries.
- Agritourism and farmgate experiences.

Next Steps

- Identify gaps in supply of food and beverage establishments which can attract and service visitors to small towns.
- Undertake investment attraction of dining and beverage businesses across the region.

Revitalising Swan Hill CBD

Major streetscaping works are required in Swan Hill to create a high amenity CBD matched to expectations of the visitor.

Swan Hill's streetscape requires improvement to realise the town's potential as a visitor and lifestyle destination, and to meet the needs and expectations of visitors.

This should reflect the quality of streetscaping at the Swan Hill riverfront.

Next Steps

- MRT to advocate and support the Swan Hill Council to strengthen the connection between the Swan Hill town centre and the Murray River, civic buildings and key visitor attractions.
- Develop modern streetscape and landscaping consistent with the local brand.

Night Time Activation

Many destinations across the Murray region are well-developed, yet lack a week-round, year-round night time economy. This is essential to developing well-rounded visitor destinations, encouraging overnight visitation and growing visitor length of stay, which will result in increased visitor yield and economic benefits for businesses.

There are a range of interventions that can assist with development of a night time economy, including lighting, busking, live music at venues and night time events such as food markets or outdoor cinemas.

Next Steps

- MRT to work with local industry and Councils to develop plan and activations.

PILLAR 4: ELEVATE FIRST NATIONS EXPERIENCE

OVERVIEW

Support Traditional Owners to build their capacity to develop products and experiences that connect visitors to cultures.

The Murray region is rich with First Nations heritage, and the Murray River and its surrounding forests are of great cultural significance for the First Nations peoples of Australia.

The numerous First Nations peoples of the Murray region have the opportunity to provide diverse cultural heritage experiences, increase visitor connection with the land, leadership in land management, and capacity building.

A growing number of Traditional Owner groups are now land managers or joint land managers of public land assets. Examples include Barmah National Park, managed by the Yorta Yorta. This is significant for the future development of First Nations experiences in the Murray region and improvement of experiences in the region's National Parks.

This Destination Management Plan provides focus on elevating First Nations experiences and importantly enabling First Nations peoples to develop the visitor economy, through support and facilitation. This will enrich visitor experiences, improve land management and support positive social outcomes for the community.

REGIONAL PRIORITY PROJECTS

Murray Region First Nations Experience Development Plan and Promotion

There is extensive potential for First Nations peoples to lead the development of tourism experiences across the Murray region, to showcase cultures and enhance visitors connection to Country.

In alignment with MRT's commitment to a Reconciliation Action Plan (RAP), MRT will support First Nations peoples to ensure they are empowered and enabled to lead the development of cultural products and experiences.

The collaborative delivery of a product development plan will help to guide investment in First Nations led tourism experiences across the Murray region. Examples of the types of tourism experience and investment opportunities include:

- Mungo National Park Tourism Investment Masterplan and Business Case.
- Gunbower National Park Investment Masterplan and Business Case.
- Barmah National Park Investment Masterplan and Business Case.
- Pental Island Aboriginal Tourism Experience.

Marketing and promotion by MRT of existing and new tourism experiences will be important to supporting the success of First Nations experiences.

Next Steps

- MRT to engage with Traditional Owners to understand current opportunities and constraints to tourism experience and investment.
- MRT to work alongside Traditional Owners to identify for First Nations led tourism experiences and investment opportunities across the Murray region.
- In conjunction with Traditional Owners, develop a First Nations Experience Development Plan, with consideration of resourcing and delivery.
- MRT to actively promote new First Nations tourism product and experiences in the region in partnership with Traditional Owners.

Lake Mulwala Aboriginal Cultural Centre

There is opportunity to deliver an Aboriginal Cultural Centre at Lake Mulwala. This has emerged as an opportunity through engagement with local Traditional Owners as a way to engage visitors with Aboriginal culture and experiences, and to connect with the Lake and River.

The Brambuk Centre at Halls Gap provides a precedent for the type of development that could be suited to Lake Mulwala.

The Cultural Centre may include:

- Visitor Information (which may replace the existing visitor information centre).
- Booking Hub for tours, products and experiences.
- Interpretation and interactive experiences.
- Marina and moorings.

Brambuk Cultural Centre



Next Steps

- Support Traditional Owners to define interest and feasibility of the centre, and their commitment to further develop.

Cultural Centre, Powerhouse Precinct, Mildura Riverfront

Mildura Rural City Council, with funding support from the State and Federal Governments, will transform the historic Powerhouse building and precinct to create a vibrant cultural, community and commercial hub for locals and visitors to enjoy.

The development will showcase Mildura's assets, including the Murray River and its rich Indigenous cultural heritage. Within the redevelopment, there is opportunity for the delivery of a cultural centre with a focus on indigenous culture and history.

There is opportunity for this to be an experience centre, with touring experiences of the River, to Mungo National Park, and other Aboriginal cultural experiences.

Powerhouse Precinct



Next Steps

- Council to deliver the Mildura Riverfront Masterplan Stage 2: Powerhouse Precinct.
- MRT to support Council, Traditional Owners and industry to activate the precinct and develop experiences.

PILLAR 5: DRIVE DEMAND

OVERVIEW

Invest in demand driving initiatives and activities which motivate and grow visitation to the Murray region and attract new markets.

The Murray region, prior to the impacts of COVID has experienced significant growth in visitation. The positioning of the Murray region as a nature-based destination as well as continued investment in riverfront precincts has strengthened the appeal of the Murray region.

The Murray region needs to focus on driving demand investment, marketing and positioning in order to compete with other nature based destinations in Australia. In order to drive demand, investment in motivational and quality accommodation is needed, improvement to region wide and destination level brands should occur and focused delivery on signature events during off the peak period is required.

Improvement to destination brand will be a key feature for the Murray region, this place based approach needs to tie together the comparative strengths of each destination, delivery of unique and compelling product and delivery of events that create strong associations with the brand.

REGIONAL PRIORITY PROJECTS

Invest in World Class Motivational Visitor Accommodation

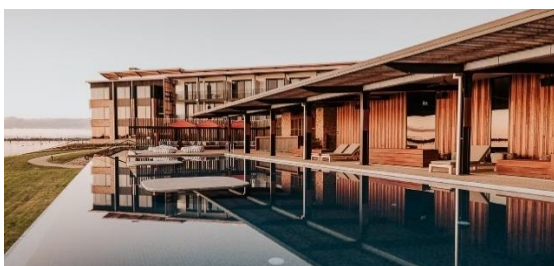
Priority accommodation investments have been identified for the region, which include hotels, resorts and holiday parks. These accommodation types are motivational for visitors, address current gaps in supply, and meet market demand.

MRT should continue to promote investment in world class accommodation across the Murray region, including in the more than 40 priority accommodation projects identified in the Murray Region Accommodation Study for details.

Next Steps

- MRT to continue to promote investment opportunities to investors.
- Council should facilitate investment by identifying suitable sites, with consideration of suitable zoning / need for rezoning.
- Promote the opportunity to a developer and facilitate planning process.

Sebel Yarrawonga



Existing Accommodation Refurbishment – Motels and Holiday Parks

Refurbishment of existing the accommodation stock is needed to meet the expectations of the existing and potential visitor market. This includes the refurbishment of holiday parks and motels to become more contemporary and have higher quality amenity and facilities.

Establishment of an investment model for motel and holiday park refurbishment should be developed so that it can be applied to dated accommodation stock throughout the region.

Refer to the Murray Region Accommodation Study for project details.

Next Steps

- Seek funding to appoint a consultant team, including an experienced architect, planner, economist and accommodation expert to develop a delivery model(s) for holiday parks and motels to respond to. This will include design elements, costs associated with improvements and return on investment. This may be taken to investors or used to assist with obtaining funding for projects.

Murray Region Brand Review and Refresh

Market research undertaken for the Murray region highlights the limited cut through of the existing regional and destination brands across the Murray region. This is reflected in the awareness of destination names.

There is a need to review and refresh the regional brand hierarchy and the cohesion between the regional and destination level brands.

Collaboration with local stakeholders should be undertaken to enhance destination brands and ensure they promote the unique selling propositions of each destination, considers cross border relationship, and considers existing brand work.

Next Steps

- MRT to consider reviewing the existing regional and destination brand strategy based on agreed local brands for the region's destinations.
- Deliver a regional and destination brand strategy based on agreed upon local brands for the region's destinations.

Murray Region Online Bookable Product and Packaging

There are limited online bookable products across the region. This presents an opportunity to increase length of stay and improve visitor experience.

Next Steps

- Educate industry on the importance of product packaging to attract high yield markets and extend spend and length of stay, and facilitate connections between industry to enhance collaboration.

Murray River Road Drive Tourism Strategy and Implementation

There is opportunity to deliver a signature, region-wide cultural event in the off-peak (i.e. winter). The event could be a unique sequence of events within the context of Australia, providing an accessible and contemporary back to nature experience, incorporating Aboriginal stories and experiences in the unique Murray setting.

This highlights the opportunity for the Murray to promote itself as a touring destination and the need for supporting visitor services.

Next Steps

- Develop a Touring the Murray Strategy which sets potential itineraries based around location and product as well as consumption of assets and product between destinations.
- Work with the tourism industry to develop packages across multiple destinations that include accommodation, product and experiences. These should be tailored to the various demographic segments of the Murray.

Murray Signature Arts and Cultural Events Program

There is opportunity to deliver a signature, region-wide cultural events in the off-peak (i.e. winter). There is opportunity for this to be a unique sequence of events within the context of Australia, providing an accessible and contemporary back to nature experience, incorporating Aboriginal stories and experiences in the unique Murray setting.

The event direction needs to be set by MRT, and local event direction to be determined by Council's in collaboration with MRT and industry. There is opportunity to create an event that is unique to the region, leveraging from the River Red Gum setting.

In addition, there is a need to develop a regional events calendar of major, demand driving events that put the Murray region on the map.

Next Steps

- Develop a regional events calendar of existing events, and undertake a gap analysis of events.
- Develop a series of signature cultural events for the region.

PILLAR 6: BUILD CAPACITY AND FACILITATE GROWTH

OVERVIEW

Facilitate visitation growth to the Murray region through investment in infrastructure, marketing and visitor servicing, and industry support and development.

In order for the Murray region to fulfil its potential for visitor economy growth, investment in capacity building activities is needed. Post COVID a number of issues facing the tourism industry have been exacerbated. This includes record low unemployment and lack of housing for workers. These are critical issues that need to be addressed to support business operation and growth and to see the region reach its potential.

Industry development will also be a focus in the near future, this includes continued support for businesses as they grapple with the challenges of operating in post COVID conditions and become more reliant on digital technology to operate and market their businesses.

REGIONAL PRIORITY PROJECTS

Regional Workforce Pathways and Promotion Program, and Skills Development Plan

MRT to develop and implement a framework that promotes the attractiveness of the tourism industry and attracts new workforce. The program should be twofold:

- 'Work in the Murray' promotion to attract new tourism industry workforce (think Want To Work in Paradise promotion from Tourism Queensland). This should consider non-monetary incentives for new workers to the region.
- Development of pathways program to attract and retain staff, including:
 - Attraction of secondary students.
 - Communication of clear progression pathways within and between business.
 - Encouragement of business use of staff sharing platforms, which will provide staff with more job security.

Using the outcomes of the regional workforce gap analysis and feedback from industry, collaborate with higher education providers, TAFE's, regional training organisation's and job networks to deliver tailored and location-based industry training solutions.

Next Steps:

- MRT to develop a regional workforce skills gap analysis and campaigns.
- MRT to work with local Councils and other local stakeholders to promote opportunities.

Temporary Workforce Accommodation Model

Access to worker housing is a major issue facing regional Australia. The tourism industry is just one sector in the Murray region that is under resourced in terms of access to workers and there is a need to deliver temporary accommodation in the Murray region to support a range of workers.

Next Steps

- Establish a working group to oversee the development of models for worker accommodation.
- Investigate the delivery of temporary workforce accommodation in key locations within the Murray region.

Cross Border Research

Cross border collaboration remains an issue facing Murray region destinations and the benefits of cross border collaboration needs to be better understood by stakeholders.

There is a need to undertake research to investigate the positive outcomes from cross border partnerships, from a brand, product development and governance perspective.

Albury Wodonga are delivering an excellent case study for cross border collaboration and this initiative should be promoted to other cross border communities.

Next Steps

- Undertake a research piece that quantifies the benefits of cross border collaboration from an economic and social perspective. This should include case studies and examples of qualitative benefits to be shared to all cross border communities.

Murray Regional Tourism Industry Leadership Program

The Murray region has a significant proportion of its industry that are micro and small enterprises. Many of these businesses are still in start-up phase and there is a need to strengthen their knowledge of the tourism industry and the opportunities that exist.

In addition to this there has been a significant change in personnel in Local Government and other larger tourism enterprises that have little knowledge or experience within the Murray visitor economy.

The establishment of a leadership program targeted to the visitor economy should be explored as a way to increase the professionalism within the sector.

Next steps

- Investigate options for the establishment of a leadership program to support future leaders of the industry. This should include review of existing programs that are operated elsewhere such as the Alpine Valleys Leadership Program.

Murray Region Local Ambassador Project

MRT to develop a region-wide program to encourage local knowledge of and local pride in the tourism industry. This should include ongoing initiatives that aim to educate local industry and residents about the product offering and events, including notification of new business, events and promotional activities to create engagement.

This may include:

- Incentive system for residents and industry to engage in tourism offerings and promote through social media.
- MRT branded business swap card system to encourage cross-business promotion and visitor information.
- Local area tourism industry communication framework.

Next Steps

- MRT to develop Plan.
- Councils to deliver actions at local level.

Visitor Information Services Review and Delivery

There is a need to continually review and reform approaches to visitor information services delivery in the Murray region. Consumer demand for digital information grows and is now the favoured method for accessing information.

The use of technology to support visitor information services delivery should be considered throughout the visitor journey.

Next Steps

- MRT to work closely with local governments and the tourism sector to identify effective and efficient ways to meet visitor servicing needs and thereby maximise visitor stay and dispersal in the region.

Transport and Infrastructure Enhancement Advocacy

Across the Murray region, there is a range of transport and infrastructure needs that constrain the visitor economy and prevent further investment.

MRT has a critical role to play in supporting industry and local government partners to advocate for improvements to and investment in transport and infrastructure needs for the region. This can include research, planning initiatives and activities, and advocacy into State and Federal Governments.

Transport needs across the region include:

- Shuttle buses.
- Taxi and uber services.
- Continued advocacy for passenger rail.
- Electric vehicle charging.
- Road widening, sealing and enhancements for Murray Valley Highway and other major arterial roads.

There are a range of services infrastructure needed to support new development and business investment, including:

- Telecommunications infrastructure to improve mobile network coverage.
- Address water pressure constraints for new development.
- Mobile network and coverage/NBN.
- Sewerage and water infrastructure (new services and increased capacity where required).

Next Steps

- MRT to establish regular meetings with Councils to understand infrastructure priorities.
- MRT to advocate into State and Federal Government for delivery of priority infrastructure.

8. MEASURES OF SUCCESS

The following targets have been identified to assess the performance of the Murray region and to track the progress of the Destination Management Plan through to 2027.

Clearly defined targets have been established against the six destination management objectives identified in this Plan, along with performance measures to track growth.

This should be measured annually to track progress against the targets and ensure successful delivery of the Destination Management Plan.

T3. PERFORMANCE TARGETS FOR THE MURRAY REGION

| Alignment to DMP Objectives | Target | Measure |
|--|---|---|
| (1) Economic Growth <ul style="list-style-type: none"> Drive regional dispersal and exploration of the region to strengthen emerging destinations and yield. Encourage year round visitation growth to support business sustainability. | <ul style="list-style-type: none"> Increased visitor expenditure. Increased visitor length of stay. Increased visitation, in particular holiday and leisure, family and luxury travellers. Increased repeat visitation. | <ul style="list-style-type: none"> Visitor expenditure, length of stay, purpose of visit and visitation to the Murray region, using Tourism Research Australia's National and International Visitor Surveys. |
| (2) Investment <ul style="list-style-type: none"> Encourage the development of motivating products and experiences to attract new markets and grow yield from existing markets. | <ul style="list-style-type: none"> Investment in tourism products, infrastructure, experiences and accommodation by private and public sector. Improved diversity of product, experience and accommodation offering. | <ul style="list-style-type: none"> Planning and building approvals for tourism projects. Visitor economy industry business counts (ABR and product / experience audits). |
| (3) Industry Development <ul style="list-style-type: none"> Support First Nations led development and delivery of tourism experiences. Facilitate partnerships to develop cohesive cross border destinations and identities. | <ul style="list-style-type: none"> Increased industry collaboration. Improved cross border collaboration. Improved industry performance and health. | <ul style="list-style-type: none"> Delivery of cross border product packages and regional marketing approach. Social media sentiment analysis. Annual business survey. |
| (4) Sustainability <ul style="list-style-type: none"> Promote sustainable approaches to tourism with consideration of economic viability, environmental protection and social equity. | <ul style="list-style-type: none"> Improved health of waterways. Improved resilience to natural disasters and disruptive events. | <ul style="list-style-type: none"> Environmental indicators (MDBA). |

APPENDICES

APPENDIX A DESTINATION MANAGEMENT PLAN PROCESS

The following process was undertaken to prepare the Destination Management Plan, including an extensive engagement and research program. An overview of the method for this project is shown below.

This Plan has been informed by in-depth engagement with visitor economy stakeholders to ensure the strategy is grounded in local needs, and aspirations.

| 1. Research and Analysis | 2. Engagement |
|--|---|
| <ul style="list-style-type: none"> • Background documents reviewed (regional, State and Federal strategies, Council plans, strategies, events audits etc.). • Murray Region Accommodation Audit 2022. • Murray Region Product And Experience Audit 2022. • Murray Region Consumer Research 2022 (past visitor survey, Australian audience survey, focus groups). • Review of Tourism Research Australia visitation data, key products and experiences, market research and target markets. • Competitive Positioning Analysis. • SWOT Analysis. • Murray River Cruising Strategy 2022. | <ul style="list-style-type: none"> • Internal Murray Regional Tourism workshops. • Accommodation Operator Survey. • LGA workshops by subregion (Revitalising the Murray). • Ten half-day workshops at destination level with local tourism industry, stakeholders (e.g. industry associations/chambers), representatives of Local Government. • Traditional Owner workshops. • Accommodation operator workshops and 1:1 engagements. • Cruising operator workshops and 1:1 engagements. • Stakeholder workshops. • DNSW. • Visit Victoria. • Parks Victoria. • DELWP. • NPWS. • Department of Forestry. • Cross-Border Commissioner. |
| 3. Project Assessment | 4. Destination Management Plan |
| <ul style="list-style-type: none"> • Identification of strategic assessment criteria. • Review of past DMP project delivery and progress. • Review of Local Area Plan priority projects. | <ul style="list-style-type: none"> • Strategic Framework. • Priority projects. • Reporting. |

APPENDIX B ALBURY WODONGA LOCAL AREA PLAN

APPENDIX C COBRAM, BAROOGA, TOCUMWAL AND SURROUNDS LOCAL AREA PLAN

APPENDIX D COROWA-RUTHERGLEN LOCAL AREA PLAN

APPENDIX E DENILQUIN AND SURROUNDS LOCAL AREA PLAN

APPENDIX F ECHUCA-MOAMA LOCAL AREA PLAN

APPENDIX G GREATER HUME LOCAL AREA PLAN

APPENDIX H KOONDROOK-BARHAM AND SURROUNDS LOCAL AREA PLAN

APPENDIX I MILDURA-WENTWORTH LOCAL AREA PLAN

APPENDIX J SWAN HILL AND SURROUNDS LOCAL AREA PLAN

APPENDIX K YARRAWONGA-MULWALA LOCAL AREA PLAN

About this Report

This report was prepared by Urban Enterprise Pty. Ltd. for Murray River Region Tourism Ltd. in December 2022.

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In the course of our preparation of this report, projections have been prepared on the basis of assumptions and methodology which have been described in the report. It is possible that some of the assumptions underlying the projections may change. Nevertheless, the professional judgement of the members and employees of Urban Enterprise Pty. Ltd. and Murray River Region Tourism Ltd. have been applied in making these assumptions, such that they constitute an understandable basis for estimates and projections. Beyond this, to the extent that the assumptions do not materialise, the estimates and projections of achievable results may vary.

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