



MURRAY DMP 2012 REVIEW

REPORT

APRIL 2019

PREPARED FOR MURRAY REGIONAL TOURISM

Urban Enterprise Urban Planning / Land Economics / Tourism Planning / Industry Software

www.urbanenterprise.com.au

AUTHORS

Mike Ruzzene

Urban Enterprise

Urban Planning, Land Economics, Tourism Planning & Industry Software

389 St Georges Rd, Fitzroy North, VIC 3068

(03) 9482 3888

www.urbanenterprise.com.au

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FILENAME: Murray DMP 2011 Review Report

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EXECUTIVE SUMMARY

OVERVIEW

The Murray Region Destination Management Plan (DMP) 2012 has provided a strong foundation for tourism investment across the Murray Region. The DMP identified key themes and priority projects for investment.

This review includes consideration of:

- The level of investment in tourism across the region between 2012-2018 and delivery of priority projects;
- Growth in the visitor economy within the Murray Region between 2012-2018;
- Specific investment and growth of visitation aligned to 2012 DMP themes.

INVESTMENT IN TOURISM 2012-2018

The 2012 DMP has been successful in driving investment into the Murray Region in recent years with a number of priority projects being implemented, funded, or progressed.

The review of the 2012 Murray DMP identified **\$372 million** investment in tourism-related projects between 2012 and 2017. It is important to note that there are a number of investments (refurbishments, expansions etc) which were not identified in this review and the actual investment level is expected to be higher than this figure.

Key projects that have been delivered which have attracted substantial funding from private and public sources in the Murray Region include:

- Swan Hill Riverfront Masterplan;
- Port of Echuca Revitalisation Phase 2 & 3;
- Mildura Riverfront Precinct;
- Albury Cultural Precinct and Albury Regional Art Gallery Upgrade;

- Silverwood Yarrawonga Lakeside Golf Development;
- Mantra Albury;
- Quest Albury on Townsend;
- Quest Wodonga;
- Cobram RACV Expansion.

GROWTH OF THE VISITOR ECONOMY 2012-2018

The Murray Region Destination Management Plan has supported a significant increase in the performance and economic contribution of the visitor economy. Since 2012 the Murray Region has experienced the following:

- Additional **557,000 overnight visitors**.
- Additional **50,000 daytrip visitors**.
- Additional **16,000 international visitors**.
- Additional **\$339 in visitor expenditure**.
- Additional **4,569 tourism related jobs** (direct and indirect).

SCORECARD FOR 2012 MURRAY DMP THEMES

The strategic development themes in the 2012 Murray DMP have been reviewed in relation to investment and visitation consumption from 2012-2018. The review shows substantial investment across most themes.

A scorecard has been prepared for each of the 2012 Murray DMP themes which analyses the level of investment and delivery against priority projects and growth/decline in visitor consumption for each theme.

Most of the themes in the 2012 Murray DMP were scored 8/10 or higher.

'The River' and 'Festivals and Events' were attributed the highest scores with substantial investment and development of these themes and corresponding increase in visitation.

The golf theme was scored the lowest of all themes. Whilst there was investment in leading golf clubs in the region, many of the middle tier and lower tier golf clubs remain in great need of improvement. Golf also experienced a decline in visitation however this may be due to general declines in golf participation across Australia. With such declines in visitation it would be difficult for investment in the golf sector to deliver positive visitor growth in the Murray Region.

TABLE 1 SCORECARD FOR 2012 DMP THEMES

Opportunity Theme	Aggregated Score	Discussion
The River	8.5	This theme scored well in terms of investment in riverfront projects and growth in river related activities by visitors.
National and State Parks: Nature based and indigenous tourism	7	Whilst there was some investment in National and State Parks, the level of investment is well below the requirements to service nature-based tourism visitors. This is demonstrated by the large amount of growth in visitors undertaking 'nature-based tourism' activities such as bushwalking.
Golf Infrastructure and Facilities	4.5	Some of the well-established golf clubs have continued to invest in their facilities, however, there remains many clubs that have had little investment in their offer. The region also experienced a decline in golf visitors since the last DMP.
Food and Wine	8	There has been substantial improvement in food and beverage across the region. Some highlights include Corowa and Whisky Factory, farm gate trail in Moira, Restaurant and café development in Echuca and a new distillery in Mildura. There has also been substantial growth in visitors undertaking food and wine activities.
History, Heritage and Culture	8	Key history and heritage attractions have seen investment and improvement this includes the Port of Echuca, Pioneer Settlement and Bonegilla. There has also been growth in visitors consuming heritage products.
Festivals, Events and Conferences	8.5	There has been continued investment in events and festivals across the region which are key motivators for visit. In addition, there has been substantial increase in visitors attending events in the Murray Region, reflecting investment and focus in events development.

1. INTRODUCTION

1.1. BACKGROUND

This report has been prepared on behalf of Murray Regional Tourism (MRT) to review the outcomes and impacts of the Murray Regional Destination Management Plan 2012 (DMP). It was prepared concurrently with the new Murray Region DMP 2018, to assess the level of investment in the region and progress of the regional tourism economy. This includes:

- A review of progress of priority projects identified in the Murray DMP 2012;
- A review of all tourism-related investment projects (public and private) based on information provided by MRT member Councils;
- An assessment of the performance of the regional tourism economy between 2012 and 2017 including:
 - Visitation;
 - Visitor expenditure;
 - Trends in visitor activities aligned with the themes of the 2012 DMP; and
 - Economic contribution of tourism.
- An assessment of DMP themes, taking into consideration investment and visitor consumption of activities aligned to these themes.

Key information has been sourced from MRT member Councils and the MRT executive.

2. TOURISM PROJECTS REVIEW

2.1. INTRODUCTION

This section reviews progress on the 2012 DMP priority projects and identifies tourism related investments which have occurred in the region between 2012 and 2017.

It is important to note that this is not an exhaustive list of all investment projects. It has relied on input from Council partners.

2.2. KEY FINDINGS

The 2012 DMP has been successful in driving investment into the Murray in recent years with several priority projects being implemented, funded, or progressed.

The review of the 2012 Murray DMP identified \$372 million investment in tourism-related projects between 2012 and 2017. It is important to note that there are several investments (refurbishments, expansions etc) which were not identified in this review, and the actual investment level is expected to be higher than this figure.

Key projects that have been delivered which have attracted substantial funding from private and public sources in the Murray Region include:

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- Mildura Riverfront Precinct;
- Albury Cultural Precinct and Albury Regional Art Gallery Upgrade;
- Silverwood Yarrawonga Lakeside Golf Development;
- Mantra Albury;
- Quest Albury on Townsend;
- Quest Wodonga;

- Cobram RACV Expansion.

2.3. SUMMARY OF PRIORITY PROJECTS REVIEW AND STATUS

A review was undertaken of the status of priority projects identified in the 2012 DMP, as shown in Table 2. The status of projects has been ranked using the following:

- ✓✓✓ Project Delivered / Under Construction
- ✓✓ Planning and design completed and awaiting funding OR a staged development with further work to be completed
- ✓ Identified opportunity. Further planning and concept development required

Table 2 highlights that all but one project (Cohuna Eco Village) have progressed beyond concept design, with many projects having progressed through to construction. Several of the priority projects are multi stage and will be delivered beyond a 10-year timeframe. These long-term projects have been included in the updated 2018 Murray Region DMP for delivery of subsequent stages.

TABLE 2 PRIORITY PROJECT REVIEW AND STATUS

THEME	PRIORITY PROJECT	STATUS	STATUS SUMMARY
The River	Ports of the Murray	✓✓	Business Case complete. Investment in Echuca, Koondrook, Mildura, Pioneer Settlement, Bonegilla. Remains a key ongoing project.
	River Access	✓✓	Significant improvement across the region and several individual riverside projects delivered. Projects associated with river access to remain a key feature of DMP.
	Riverfront Commercial Precinct, Albury	✓✓	Stage One complete. Staged development considered as part of next DMP.
	Swan Hill Riverfront Masterplan	✓✓	Stage One complete. Staged development considered as part of next DMP.
	Pioneer Settlement Heartbeat of the Murray	✓✓✓	Heartbeat of the Murray operating and successful following a \$7 million investment.
	Murray River Adventure Trail	✓✓	Business case and planning complete. Staged development considered as part of next DMP. Various sections have received funding on both NSW and Victorian side of the border.
	Murray Valley Trail (Murray River Road)	✓✓	Promotional material developed. Remains a key on-going project.
	Port of Echuca Revitalisation Phase 2 & 3	✓✓	\$15m invested as part of staged development. Next stage to be considered in DMP.
	Mildura Riverfront Precinct	✓✓	\$18m invested in staged development of the riverfront. Staged development considered as part of next DMP.
National and State Parks	Lake Mungo Visitor Centre	✓✓✓	A major upgrade of the Mungo Visitor Centre is complete.
	Lake Mungo All Weather Road	✓✓	Detailed design completed. Requires funding allocation.
Golf	Cohuna Eco Village and Golf Resort	✓	Has not progressed to development.
Food and Wine	Corowa Chocolate Factory and Whisky Distillery	✓✓	Whisky distillery developed and operating. Further stages include development of the surrounding tourism precinct.
History, Heritage and Culture	Albury Cultural Precinct and Albury Regional Art Gallery Upgrade	✓✓✓	MAMA developed and operating successfully (\$10.5m). Further work on the QEII precinct required.
Events and Festivals	North West Motor Sport Development Strategy	✓✓	Swan Hill Drag Strip Delivered (\$3.5m). Masterplan for Mildura Motorsport Complex completed and endorsed by Council.
Accommodation	Echuca Moama 5 Star Resort and Conference Centre	✓	Has not been developed but remains a strategic opportunity.

2.4. 2012 DMP ALL KEY PROJECTS - STATUS

The following summarises the major projects outlined in the 2012 DMP and the works which have taken place since the preparation of the DMP. This demonstrates a vast amount of planning, feasibility, business case and construction has taken place across the Murray Region aligned to the 2012 DMP.

2.4.1. INVESTMENT PROJECTS

ALBURY REGIONAL ART GALLERY UPGRADE (MAMA)

Status: Project funded and delivered 2015

The gallery was renamed and upgraded through a \$10.5 million major refurbishment. The gallery now has capacity to accommodate major exhibitions with over 2,000sqm of gallery space across two levels. Visitation has risen from 25,000 to over 100,000 per annum as a result of the upgrades, and the gallery anchors the emerging arts and cultural precinct, a key driver for visitation in the city.



MAMA Albury. Source: <http://nbsarchitecture.com/portfolio/albury-regional-art-gallery/>

WONGA WETLANDS TOURISM DEVELOPMENT

Status: Masterplan complete 2014, staged delivery undertaken 2014-2018

Wonga Wetlands was a former wastewater treatment area which in 2000 received no visitors. However, through continued rehabilitation of the site, and investment in education and visitor facilities, now attracts between 20,000-25,000 visitors annually, and is an important local biodiversity hot spot with over 154 identified bird species.

WAGIRRA TRAIL EXTENSION AND MURRAY RIVER EXPERIENCE.

Status: Masterplan and detailed design complete, project construction commenced 2018

The Wagirra Trail has been extended to Wonga Wetlands with 6km of new trail costing \$2.1 million. Further extensions are planned to Lake Hume to make to link with the High-Country Rail Trail and create a significant trail experience.

ALBURY-WODONGA ARTS FESTIVAL

Status: Planning underway for Arts Festival 2019

A major arts festival was recommended to leverage the significant arts assets of both cities. Advanced planning is now underway to for the two cities to co-host the major festival in 2018/19.

WODONGA CBD DEVELOPMENT – JUNCTION PLACE

Status: Public realm improvements and entertainment spaces delivered 2016

There has been significant investment into the Wodonga CBD including new major retailing centre, and boutique retail and food offering in Junction Place. This has provided a new and contemporary café precinct, a key gap in Wodonga, and rejuvenated a rundown area of the city.



Junction Place Wodonga. Source: Places Victoria

Following site acquisition, remediation works and a two staged commercial procurement process, Development Victoria signed a Development Agreement with a local developer (Central Place) in March 2016, to deliver a \$200 million mixed use precinct comprising residential, cinema/entertainment, commercial offices, hotel, retail, public open spaces and a European market hall.

The \$200 million project will transform and activate the former railway site into a vibrant and integrated residential, community and commercial precinct in the heart of Wodonga CBD that will catalyse economic growth and development of the regional city, by increasing visitation, employment, business investment and community engagement opportunities.

Projects completed to date include:

- Remediation and refurbishment of the heritage buildings and opening of new retail tenancies – such as Miss Amelie, BeanStation Café and Beer Café;
- Delivery of public realm and pedestrian linkages such as the Junction Square and Promenade;
- Delivery of public amenities at the eastern end of the Station Building;
- Successful hosting of a number of community events, including food and wine festivals that have attracted more than 15,000 people to Junction Place over the past three years;

- Late 2016 – Approval of the Station 73 Masterplan;
- October 2017 – Council approval of Central Place’s planning application for 86 residential apartments, which is the first stage of the residential development at the \$200 million urban renewal project;
- November 2017 – Commencement of early works (internal access road and car parks).

GATEWAY ISLAND TOURISM DEVELOPMENT

Status: Masterplan prepared 2018

Gateway Island and Lakes represent a major tourism opportunity. Council completed a detailed masterplan to identify and implement future tourism development projects.

TOCUMWAL RIVERFRONT DEVELOPMENT

Status: Masterplan prepared 2016, staged investment underway

Tocumwal Riverfront has been identified as a significant tourism opportunity for a number of years. A holistic masterplan was completed in 2016 to guide future investment opportunities including a splash park and play space, amphitheatre, new VIC, and walking trails. Staged development of the precinct has been included in the 2018 DMP.

PORT OF ECHUCA REVITALISATION

Status: New Discovery Centre and wharf refurbishment completed 2013

The Port Revitalisation has been a staged development, with \$15 million refurbishment of the wharf completed in 2013 as part of Stage One. Stages 2 and 3 will need to be considered in the new DMP.

ECHUCA ART GALLERY (FOUNDRY ARTS SPACE)

Status: Foundry Arts Space Completed 2015

There is been demand for a regional gallery in Echuca for a number of years. The Foundry Arts Space was opened in 2015 as an Echuca Moama Arts Initiative, and hub for local and exhibiting artists, and theatre performances. It has assisted in addressing a key gap in the arts offering of the central Murray.



Foundry Art Space, Echuca.. Source: Echuca Moama Arts Initiative

FIVE MILE RESERVE, MOAMA

Status: Investment completed at 5 Mile including amenity improvements and MTN Bike Course 2014

Upgrade of Five Mile Reserve including improved events infrastructure and 7km purpose-built mountain bike course. The MTB course provides a new recreational opportunity for visitors in Echuca Moama and meets the needs of the growing MTB market.

YARRAWONGA LAKESIDE GOLF DEVELOPMENT (SILVERWOODS AND SEBEL).

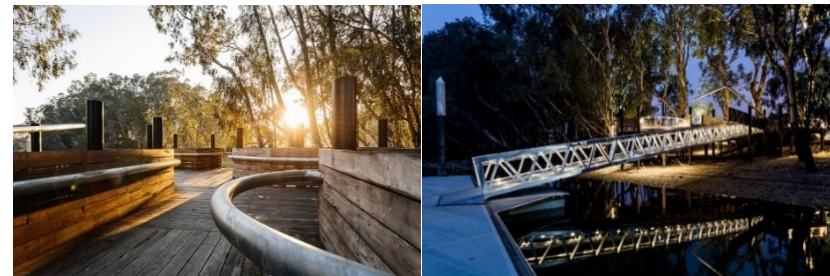
Status: Construction underway to be completed 2019

Development of the lakeside golf course, and boutique hotel and serviced apartments. The 18-hole course was completed in 2016, and construction on the \$35 million Sebel Hotel and Resort has begun and expected to be completed by 2019. It will include 117 room boutique hotel, fine dining restaurant, 300 delegate conference facility, and pool and gym facilities.

KOONDROOK WHARF

Status: Wharf completed 2016, Stage 2 Nature Based Hub and riverfront masterplan underway

The \$2.4 million Koondrook Wharf was officially opened in 2016 and provides a link to the Ports of the Murray project. It includes a moored pontoon (with capacity for paddle steamers), 28m gangway and series of viewing platforms with interpretive features. It is an important catalyst project which will allow for the expansion of eco-tourism commercial opportunities.



Koondrook Wharf. Source: <http://www.terroir.com.au/articles/projects/koondrook-wharf-2017-04-23>

SWAN HILL RIVERFRONT REDEVELOPMENT AND PIONEER SETTLEMENT UPGRADE.

Status: Delivery of amenity improvements and lazer show 2015

Swan Hill's Riverfront has undergone staged redevelopment with Stage 1 works completed to improve trails and public infrastructure. Aligned with the project has been upgrades to Pioneer Settlement with more interactive exhibits and the development of a sound and light show (Heartbeat of the Murray) to drive overnight stays. The shows has averaged over 50 patrons per night since its introduction.



Heartbeat of the Murray, Swan Hill. Source: Laservision

SWAN HILL MOTORSPORTS COMPLEX

Investment in new dragstrip completed 2017

\$3.5 million investment including development of a new dragstrip. Council has committed \$500,000 of further improvements to meet Australian National Standards and support larger events.

MILDURA RIVERFRONT PRECINCT

Investment in stage 1 works completed 2018

An \$18 million rejuvenation of the Mildura Riverfront with significant investment into landscaping, access, waterplay park, amphitheatre, upgraded rowing club, and interpretive signage. It is a major redevelopment to establish Mildura as Victoria's most significant inland river city. Future stages will include commercial development, connections to the town centre, and opportunities for the Powerhouse.



Mildura Riverfront. Source: Mildura Rural City

2.4.2. REGIONAL POSITIONING PROJECTS

The 2012 DMP identified a number of major regional positioning projects which have progressed and have been important to developing the visitor connection and dispersal across the Murray.

PORTS OF THE MURRAY

Status: Investment has occurred in Echuca, Koondrook, Mildura, Pioneer Settlement, Bonegilla aligned to the Port of Murray concept.

The Ports of the Murray Strategic Initiative was conceived to restore and present the story of the Murray through its historic ports linking the destinations of Wentworth Mildura all the way to Albury Wodonga. It is an umbrella project to facilitate major investment opportunities into Murray ports and riverfronts including a number of projects which have been successful (e.g. Heartbeat of the Murray, Koondrook Wharf, Port of Echuca, Mildura Riverfront).

MURRAY RIVER ADVENTURE TRAIL

Status: A number of components of the trail have been delivered, funded, or progressed to planning since the 2012 DMP. Further funding has recently been secured for work on both NSW and Victorian sections of the trail.

The development of an iconic, world-first, multi-mode trail, creating a new nature-based experience across the Murray River. The Murray River Adventure Trail is a multi-sport adventure trail which extends along the length of the Murray River within the Murray tourism region in Victoria and NSW, using land and water to incorporate walking, cycling, kayaking/canoeing and other forms of water transport. The total cost of trail is estimated at \$27.3 million, and a three stage 10-year plan has been adopted to deliver the trail.

MURRAY RIVER ROAD

Status: Project brief written for market assessment and feasibility. Further funding is required to progress the project concept.

A region-wide touring route from the river's Alpine origins to its mouth in South Australia. The touring route will link the natural beauty of the region and the charm and welcoming nature of local communities. It is envisaged to appeal to new markets such as internationals and younger millennials. Further work is required to determine the route, and development the required marketing collateral.

RIVER ACCESS INFRASTRUCTURE

Status: investment in various river infrastructure

River Access was identified as a strategic initiative for the Murray: it is the provision of improved and additional points for visitors, and locals, to experience the river. This includes boat ramps, roads, parking and associated amenities that support people making use of the Murray for recreation and social activities. Historically, many of the Murray towns had 'turned their back' on the river. However, since 2012 there has been significant investment on both sides of the river to enhance access to the river.

2.4.3. MAJOR PRIVATE INVESTMENTS

In addition to the DMP Projects identified above, there have been a number of major investments which align to the strategic themes and goals of the 2012 DMP. The major investments (over \$1 million) includes:

- **Mantra Albury** - \$30 million, 158 room Mantra Albury which will include a restaurant and bar, executive lounge, gymnasium and conference spaces.
- **Quest Albury on Townsend** – A second Quest property in the heart of the CBD, purpose built in the heritage listed wool store. The property has 80 rooms and included an investment of approximately \$12 million.
- **Atura Albury.** \$6 million refurbishment of one of Albury's landmark hotels.
- **Best Western Albury.** \$2 million refurbishment of rooms, function spaces, and restaurant.
- **Quest Wodonga.** \$25 million serviced apartment complex with 79 rooms and attached bar and restaurant.
- **MV Mary Ann, Echuca.** The new MV Mary Ann floating restaurant offering a unique dining experience and catering for special events (\$2 million investment).
- **Twisted Science, Echuca.** New science-based attraction located in the Port precinct (\$2 million investment).
- **Edward River Big 4 Holiday Park.** \$1 million expansion of with 43 new sites and 6 cabins.
- **The American, Echuca.** Multi-million dollar refurbishment of the American Hotel
- **Corowa Chocolate Factory and Distillery.** \$1 million+ invested in distillery.
- **Cobram RACV Expansion.** \$20 Million+ invested by RACV on new facilities and accommodation.
- **Aquazone, Yarrawonga.** Investment and operation of inflatable adventure park, Yarrawonga.
- **Rich Glen Olive Development.** Investment in café, shopfront, museum and gardens.
- **Big Strawberry Playground.** Indoor playground delivered as part of attraction.
- **Fosseys Gin (Mildura).** Investment in Fosseys Gin distillery, Mildura.
- **Sunraysia Wine Hub (Mildura).** Sunraysia Cellar Door with over 26 wineries.
- **Mildura Brewery (refurbishment).** Purchase and investment in Mildura Brewery including expansion of manufacturing area.

3. INVESTMENT IMPACT

3.1. INTRODUCTION

The following is a high-level assessment of the performance of the Murray River tourism industry since 2012.

3.2. KEY FINDINGS

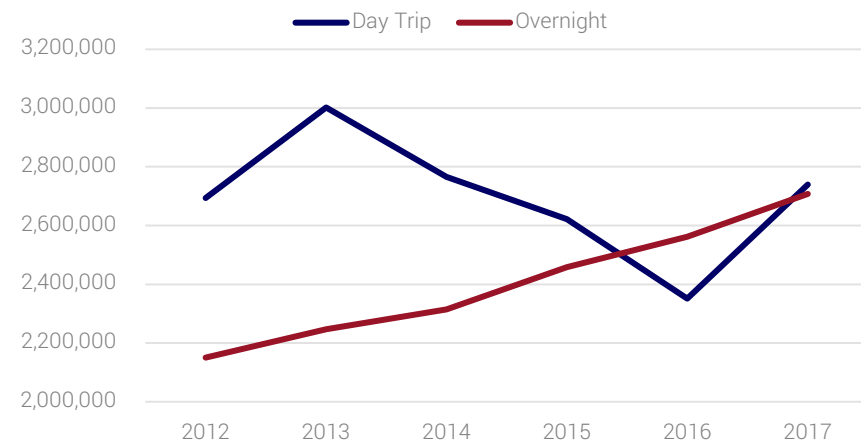
The DMP has supported a significant increase in the performance and economic contribution of the visitor economy. Since 2012 the Murray Region has experienced the following:

- Additional 557,000 overnight visitors.
- Additional 50,000 daytrip visitors.
- Additional 16,000 international visitors.
- Additional \$339 in visitor expenditure.
- Additional 4,569 tourism related jobs (direct and indirect).

3.3. VISITATION

Overnight visitation has increased significantly by an additional 550,000 visitors since 2012. In comparison, daytrip visitation experienced a decline to 2016, then a sharp increase in 2017 to remain similar to 2012 levels. Increased length of stay and conversion of daytrip visitors to overnight was a key objective of the 2012 DMP. This has translated to significant increases in visitor yield and expenditure.

FIGURE 1 MURRAY REGION VISITATION 2012-2017



Source: TRA NVS & IVS Visitation 2012-2017

3.4. ACTIVITY CONSUMPTION 2012-2017

National Visitor Survey data was used to understand how visitor patterns have changed since 2012 in terms of activities undertaken.

There has been significant growth in activities aligned with the themes of the 2012 DMP including visiting National and State Parks, fishing, visiting farms, markets, and visit wineries, and festivals and events.

This reflects investment in products and infrastructure which support these activities and growth in the appeal of the Murray Region.

Golf is one area which had declined over the 2012-2017 period. It should be noted that through consultation some golf course destinations had reported increases in visitation. However, many of the smaller courses and less developed courses experienced decline in visitors. The decline in visitation may also reflect a decline in golf participation.

TABLE 1 VISITOR ACTIVITY MURRAY REGION 2012-2017

Visitor Activity	2012-2017 Change in Overnight	2012-2017 Change in Daytrip
Visit national parks / state parks	+62,145	+9,386
Visit farms	+16,960	+27,953
Bushwalking	+45,787	+68,387
Fishing	+26,999	+33,508
Golf	-9,830	-36,969
Water activities / sports	-21,885	+24,568
Exercise, gym or swimming	+62,263	+85,268
Attend theatre, concerts or other performing arts	+7,935	+22,792
Visit museums or art galleries	+11,931	-18,010
Attend festivals / fairs or cultural events	+15,602	+29,619
Visit history / heritage buildings, sites	+66,791	-27,229
Go to markets	+58,071	+31,817
Visit wineries	+43,080	-8,462
Charter boat / cruise / ferry	-197	-21,882
Pubs, clubs, discos etc	+208,444	+16,570
Eat out / dine at a restaurant and/or cafe	+315,753	-37,226

Source: TRA NVS & IVS Visitation 2012-2017

3.5. ACCOMMODATION USED 2012-2017

Reinvestment and development of the accommodation sector was a key theme of the 2012 DMP. There have been some major accommodation facilities constructed and re-investment into existing establishments.

The highest growth in accommodation used includes;

- Hotel/resort/motel
- Friends and relative's property.
- Increased capacity and quality in the hotel and motel sector has facilitated a significant increase in visitors in that market whilst growth in residential properties across the region has facilitated growth in the visitors staying with friends or relatives.

Interestingly a decline in rented house/apartment/flat and private accommodation (holiday homes) was observed in the region. This is in contradiction to the rise of Air B&B in the period. This may be the result of holiday homes transitioning to permanent accommodation with the rise of 'tree change' residents in the region. It also represents opportunity for further investment in this market with a tightening of stock available.

TABLE 2 MURRAY REGION ACCOMMODATION USED 2012-2017

Overnight Accommodation Used	2012	2017	Growth
Hotel/resort/motel or motor Inn	778,035	985,109	+207,075
Guest house or Bed & Breakfast	16,123	28,506	+12,383
Rented house/apartment/flat or unit	99,182	76,671	-22,511
Caravan park or commercial camping ground	357,382	362,740	+5,358
Other commercial accommodation	19,596	6,325	-13,270
Own property	40,020	65,268	+25,248
Friends or relative's property	667,282	914,276	+246,994
Caravan or camping - non-commercial	132,074	215,084	+83,010
Other Private Accommodation	52,579	31,474	-21,104
Other Accommodation	22,592	27,849	+5,257
Total Overnight Visitors	2,150,368	2,707,699	+557,332

Source: Urban Enterprise 2018

3.6. VISITOR EXPENDITURE AND EMPLOYMENT

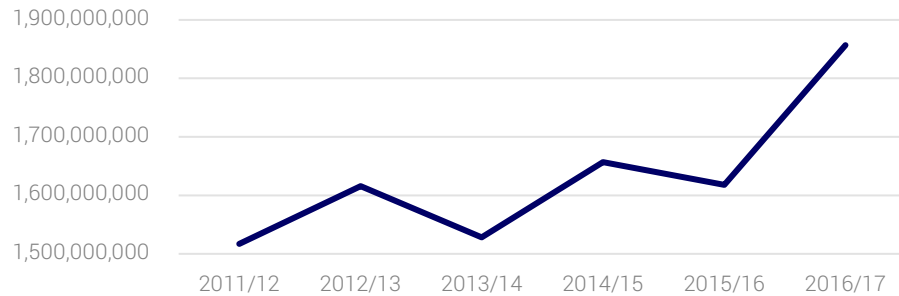
The significant growth in overnight visitors has facilitated greater expenditure in the region, with an additional \$339 million in visitor expenditure in the regional economy. This has supported an additional 4,569 jobs in the visitor economy (direct and indirect). The 24,968 tourism related jobs (indirect and direct) represents 19.9% of total employment in the Murray Region.¹

TABLE 3 MURRAY REGION VISITOR EXPENDITURE AND TOURISM RELATED JOBS

	Daytrip Expenditure	Overnight Expenditure	Direct Expenditure	Direct and Indirect Expenditure	Direct and Indirect Jobs
2011/12	\$282m	\$1.23b	\$1.52b	\$2.43b	20,399
2016/17	\$357m	\$1.50b	\$1.86b	\$2.97b	24,968
Nominal Growth	+\$74m	+\$265m	+\$339m	+\$544	+4,569

Source: Urban Enterprise 2018 using an expenditure-based model for employment, including inputs from TRA expenditure data.

FIGURE 2 MURRAY REGION DIRECT VISITOR EXPENDITURE 2012–2017



Source: TRA NVS & IVS Visitation 2012–2017

¹ Based on 2016 Census Employment data

4. ASSESSMENT OF DMP THEMES

4.1. INTRODUCTION

This section draws on the above analysis to provide a scorecard for each of the Murray River Themes.

This scorecard considers the following:

- Delivery of priority projects against each theme;
- Investment projects against each theme.

A maximum score of 5 is provided for each of the two categories above, with a total score out of 10.

4.2. KEY FINDINGS

The strategic development themes in the 2012 Murray DMP have been reviewed in relation to investment and visitation consumption from 2012-2018. The review shows substantial investment across most themes.

A scorecard has been prepared for each of the 2012 Murray DMP themes which analyses the level of investment and delivery against priority projects and growth/decline in visitor consumption for each theme.

Most of the themes in the 2012 Murray DMP were scored 8/10 or higher.

'The River' and 'Festivals and Events' were attributed the highest scores with substantial investment and development of these themes and corresponding increase in visitation.

The golf theme was scored the lowest of all themes. Whilst there was some investment in leading golf clubs in the region many of the middle tier and low tier golf clubs remain in great need of improvement. Golf also experienced a decline in visitation however this may be due to general declines in golf

participation across Australia. With such declines in visitation it would be difficult for investment in the golf sector to deliver positive visitor growth in the Murray Region.

TABLE 4 SCORECARD FOR 2012 DMP THEMES

Opportunity Theme	Aggregated Score	Discussion
The River	8.5	This theme scored well in terms of investment in riverfront projects and growth in river related activities by visitors.
National and State Parks: Nature based and indigenous tourism	7	Whilst there was some investment in National and State Parks, the level of investment is well below the requirements to grow nature-based tourism. This is demonstrated by the large amount of growth in visitors undertaking 'nature-based tourism' activities such as bushwalking.
Golf Infrastructure and Facilities	4.5	Some of the well-established golf clubs have continued to invest in their facilities, however, there remains many clubs that have had little investment in their offer. The region also experienced a decline in golf visitors since the last DMP.
Food and Wine	8	There has been substantial improvement in food and beverage across the region. Some highlights include Corowa and Whisky Factory, farm gate trail in Moira, Restaurant and café development in Echuca and a new distillery in Mildura. There has also been substantial growth in visitors undertaking food and wine activities.
History, Heritage and Culture	8	Key history and heritage attractions have seen investment and improvement this includes the Port of Echuca, Pioneer Settlement and Bonegilla. There has also been growth in visitors consuming heritage products.

Festivals, Events and Conferences	8.5	There has been continued investment in events and festivals across the region which are key motivators for visit. In addition, there has been a substantial increase in visitors attending events in the Murray Region, reflecting investment and focus in events development.
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4.3. SCORECARD RESULTS

Table 5 provides a scorecard for DMP themes. The highest performing themes based on level of investment and growth in visitor consumption include:

- The River (score of 8.5/10). This theme scored well in terms of investment in riverfront projects and growth in river related activities by visitors.
- Festivals, Events and Conferences (score of 8.5/10). This theme scored well in terms of development of the events and festivals program across the region and subsequent high growth in events visitors.

The lowest scored themes include:

- National and State Parks (score of 7/10). Whilst there was some investment in National and State Parks, the level of investment is well below the requirements to grow nature-based tourism. This is demonstrated by the large amount of growth in visitors undertaking 'nature-based tourism' activities such as bushwalking.
- Golf (4/10). Some of well-established golf clubs have continued to invest in their facilities, however, there remains many clubs that have had little investment in their offer. The region also experienced a decline in golf visitors since the last DMP.

TABLE 5 SCORECARD FOR DMP THEMES

Opportunity Theme	Product Development Initiatives	Level of Investment in Priority Projects and Initiatives	Score out of 5	Visitor Consumption Change 2012-2017	Score out of 5	Aggregated Score
The River	Riverfront project proposals in Mildura, Swan Hill, Albury, Koondrook, Tocumwal, Corowa, Barham and Gateway Island.	Significant body of work undertaken for riverfronts including masterplans for most locations identified and major investment in Riverfronts for Mildura, Swan Hill, Albury, Koondrook.	4.5	Fishing: +26,999 O/N +33,508 D/T	4	8.5
	River access project as part of Ports of the Murray. Elements of the River Red Gum development plans.	Many small riverfront access projects undertaken including improvement to boat ramps and moorings. Further work still to be undertaken in this area.		Water activities / sports: -21,885 O/N +24,568 D/T		
	Murray Valley Trail Murray Adventure Trail Themed touring Routes Hub and spoke touring loops	Touring projects for the river have had little traction, other than the Murray Adventure Trail which has seen numerous sections delivered and further funding provided to deliver works.		Ferry or boat cruise -197 O/N -21,882 D/T		
National and State Parks: Nature based and indigenous tourism	Lake Mungo all weather road Lake Mungo visitor centre	Investment made into the Mungo visitor centre, however the all-weather road still requires funding. There remains further work to deliver international quality experience at Mungo.	2	Visiting National Parks: +62,145 O/N +9,386 D/T	5	7
	NSW and Victorian River Red Gum Parks development programs are underway. High ropes experience, eco-lodges, tracks and trails.	New National Parks have been delivered and investment in amenity and infrastructure has occurred to some degree on NSW side. There remains a significant level of work to be undertaken to reach a high-quality level of experience of the National and State Park assets.		Bushwalking: +45,787 O/N +68,387 D/T		
Golf Infrastructure and Facilities	International visitor ready golfing resorts Diversify accommodation to meet a range of visitor needs Review dining options at golf resorts against consumer demands	Some level of investment has occurred at larger resorts and clubs. This includes improvements to accommodation supply, investment in food and beverage and events spaces. Many of the 2 nd and 3 rd tier clubs have good quality greens however their amenity and infrastructure still requires significant investment.	3.5	Golf: -9,830 O/N -36,969 D/T	1	4.5

Food and Wine	Corowa Chocolate Factory Koondrook Goods Store Proposal Riverfront development projects	There has been substantial improvement in food and beverage across the region. Some highlights include Corowa and Whisky Factory, Farm Gate trail in Moira, Restaurant and café development in Echuca and a new distillery in Mildura.	3.5	Visit farms: +16,960 O/N +27,953 D/T	4.5	8
	A range of smaller tourism products; cellar doors, farm gate and meet the maker, Providore in towns, goods vans during camping peak periods.	Farm gate investment has occurred, there remains opportunity to service casual camping visitors.		Visit wineries: +43,080 O/N -8,462 D/T Eat out / dine at a restaurant and/or café: +315,753 O/N -37,226 D/T		
History, Heritage and Culture	Port of Echuca Redevelopment Phase 2 and 3. Albury Cultural Precinct and Albury Regional Art Gallery Upgrade	Port of Echuca Phase 2 and 3 have attracted little investment, whilst the Albury Art Gallery upgrade has been delivered.	3.5	Attend theatre, concerts or other performing arts: +7,935 O/N +22,792 D/T	4.5	8
	Corowa Federation Museum, Holbrook Submarine Museum, Deniliquin Ute Museum, the Echuca Art Gallery and the Murray Open House Festivals.	There have been other art related projects that have enhanced this product category in the region including Gateway Island in Wodonga and the foundry arts space.		Visit museums or art galleries: +11,931 O/N -18,010 D/T Visit history / heritage buildings, sites: +66,791 O/N -27,229 D/T		
Festivals, Events and Conferences	Murray Fishing League	This project has not been delivered. However, an Events Strategy was prepared for the Murray Region. There has been continued investment in events and festivals across the region which are key motivators for visit.	4	Festivals and events: +15,602 O/N +29,619 D/T Go to markets: +58,071 O/N +31,817 D/T	4.5	8.5

Urban Enterprise

389 St Georges Road,
Fitzroy North, Vic, 3068

(03) 9482 3888

www.urbanenterprise.com.au

