



# MURRAY REGION DESTINATION MANAGEMENT PLAN

MURRAY REGIONAL TOURISM



[www.murrayregionaltourism.com.au](http://www.murrayregionaltourism.com.au)



## **AUTHORS**

Mike Ruzzene

Chris Funtera

## **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](http://www.urbanenterprise.com.au)

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## ACKNOWLEDGEMENTS

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## GLOSSARY OF TERMS

**Domestic daytrip visitors:** 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.

**Domestic overnight visitors:** 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 visitors:** A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.

## ACRONYMS

<b>AGFG</b>	Australian Good Food Guide
<b>DMP</b>	Destination Management Plan
<b>DNSW</b>	Destination New South Wales
<b>DRM</b>	Destination Riverina Murray
<b>IVS</b>	International Visitor Survey
<b>LGA</b>	Local Government Area
<b>MRR</b>	Murray River Road
<b>MRT</b>	Murray Regional Tourism
<b>MTB</b>	Mountain Bike
<b>NSPW</b>	NSW Parks and Wildlife
<b>NVS</b>	National Visitor Survey
<b>NP</b>	National Park
<b>POMR</b>	Ports of the Murray
<b>RV</b>	Recreational Vehicle
<b>TRA</b>	Tourism Research Australia
<b>VFR</b>	Visiting Friends and Relatives
<b>VIC</b>	Visitor Information Centre
<b>WHM</b>	Working Holiday Makers



# FOREWORDS

## MURRAY REGIONAL TOURISM BOARD CHAIR

As chair of the Murray Regional Tourism Board, I'm proud to present this Destination Management Plan (DMP), which provides a blueprint for the future to drive more visitors to the Murray Region.

Providing an overarching tourism strategy, a clear developmental direction, focused product development and support for infrastructure, Murray Regional Tourism has set about realising its goal of making the Murray 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.

This DMP builds on the success of the Murray Region 2012 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.

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

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

The Murray River is an Australian icon and lifeblood of many communities, and winds through three states, presenting unique challenges to tourism operators.

This 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.

This plan identifies eight 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. A major game changing project that has been identified by our board is Murray River Road. The mighty Murray River traverses more than 2500 kilometres of breathtaking scenery with a diverse range of key offerings and adventures along the river that we want the world to explore.

Importantly, it also details the way forward for destination management, which is vital for the long term, sustainable growth of tourism along the Murray. It is a plan that will help build community capacity to maximise tourism opportunities and diversify the region's economy.

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

For the industry and all levels of government, this plan is a vital tool which provides greater certainty for tourism development and investment, and the best possible outcomes for communities in the Murray Region.

Responsibility for implementation is a partnership 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 Murray Region.

**Wendy Greiner**



*Murray Regional Tourism Board Chair*

## NSW MINISTER FOR TOURISM AND MAJOR EVENTS

Tourism is vital to the people of the Murray River. It injects billions of dollars into local economies, and provides nearly 20 per cent of local jobs – the region's second largest employer.

The New South Wales Government recognises the significant tourism gains made in recent years, with the region now an important player in the State's visitor economy. More visitors to our regions means stronger local economies with rural and regional NSW recording significant growth in visitors and expenditure.

Central to this success has been the unique cross-border collaboration between the Murray River communities. I am excited about the delivery of the Murray Region Destination Management Plan and the even brighter future it heralds for tourism along the Murray.

### **The Hon. Adam Marshall MP**

*Minister for Tourism and Major Events, NSW*

## VICTORIAN MINISTER FOR TOURISM AND MAJOR EVENTS

The Murray River's popularity as a holiday destination has grown enormously in recent years. This is a result of the region's diverse strengths, as well as the continued focus and consultative, cross-border approach of Murray Regional Tourism.

The Murray region makes an incredibly valuable contribution to Victoria's visitor economy. As identified in this plan, overnight visitation has increased significantly, with the Murray region attracting an additional 557,000 visitors since 2012, which has facilitated greater expenditure in the region. Even further growth is anticipated, with overnight visitation forecast to rise to 3.7 million by 2030.

I look forward to seeing the Murray region continue to develop under the Destination Management Plan. I am confident that the clear and strategic vision outlined in this plan, along with the strong leadership of Murray Regional Tourism will deliver even more success for the Murray region and the communities it supports.

### **The Hon. John Eren MP**

*Minister for Tourism and Major Events, Victoria*



## EXECUTIVE SUMMARY

The Murray Destination Management Plan (DMP) is a strategic plan that builds on the outcomes of the Murray Region DM P 2012, to provide an updated strategic approach to prioritising key tourism experiences and product development, and ensure continued sustainable growth of the visitor economy.

### THE REGION

MRT is the only Regional Tourism Organisation (RTO) in Australia that includes areas within two states, Victoria and NSW, and is responsible for providing overarching tourism strategy for the Murray Region. For analysis, the councils that comprise the MRT region have been grouped into five sub-regions, as summarized below.

SUB-REGION	LGAs
Eastern Murray	Greater Hume (NSW), Albury (NSW), Wodonga (Vic)
Mid Eastern Murray	Moira (Vic), Berrigan (NSW), Federation (NSW)
Central Murray	Campaspe (Vic), Edward River (NSW), Murray River (eastern half) (NSW)
Mid Western Murray	Swan Hill (Vic), Gannawarra (Vic), Murray River (western half) (NSW)
Western Murray	Mildura (Vic), Wentworth (NSW)

### ECONOMIC CONTRIBUTION

Tourism has become an increasingly significant part of the Murray's economy, and has important cross-over with the region's other economic strengths in agriculture and liveability. In 2017 the visitor economy supported:

- 5.4 million visitors (daytrip and overnight).
- \$2.9 billion in visitor expenditure in the region (direct and indirect).
- 24,968 tourism related jobs (direct and indirect), representing 19.9% of total employment in the region.

### REVIEW OF 2012 DMP

The 2012 DMP has proven a successful blueprint for investment into the region and has supported over \$372 million of investment in tourism related projects between 2012-2017 (based on a conservative estimate). It is important to note that prior to 2012, the Murray Region had experienced a period of minimal growth primarily due to drought conditions, the global financial crisis, high petrol prices, as well as limited collaboration and an ad hoc marketing approach for the region. From between 2008-2012, overnight visitation to the region declined by 200,000 visitors. However, the 2012 DMP has coincided with a period of strong growth in the visitor economy, and between 2012 and 2017 the region has grown by the following:

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

Key to this growth has been the strategic and collaborative approach to tourism at the regional level fostered by MRT. It is imperative that this continues to ensure on-going visitor growth and economic contribution to the region.

## TOURISM PRODUCT STRENGTHS

The Murray Region has a number of regional product strengths that define the perceptions of sub-regions, and appeal to a variety of markets. These have been included in the following categories:

**Primary strengths** refer to tourism strengths that are synonymous with the Murray brand and are considered to be the region's competitive advantage. Primary strengths include drawcard attractions, experiences and activities.

**Secondary strengths** refer to tourism product that has a smaller presence throughout the region but provides an important complementary offering for visitors.

**Emerging strengths** refer to tourism product that is limited in the region but has the opportunity to develop over time.

TOURISM SECTOR	MURRAY REGION	DESCRIPTION
<b>Water Sports</b>	Primary	Water sports are a major feature of the region with a number of destinations well known for skiing and boating.
<b>Food, Wine and Produce</b>	Primary	Some of Australia's most productive agricultural land is located within the Murray Region, including broadacre farming, dairying, and significant areas of irrigated fruit production.
<b>Fishing</b>	Primary	The rivers, lakes and waterways support a wide range of fishing opportunities. The Murray Cod offers one of the iconic fishing experiences in Australia.
<b>Houseboats / River Cruise</b>	Primary	Paddlesteamers and houseboats on the river offer a unique Australian experience and an enjoyable way of exploring the river.
<b>Golf</b>	Primary	The Murray is Australia's number one golfing destination with 67 golf courses catering to a variety of standards.
<b>Festivals and Events</b>	Primary	Festivals and events are a major driver to the region. The region hosts approximately 555 annual events attracting 833,000 attendees (Murray River Events Strategy).
<b>History and Heritage</b>	Primary	The region supports a range of heritage experiences including pioneer, early immigration, irrigation agriculture, river transport and economy, and Indigenous. Existing history and heritage attractions in the region include the Port of Echuca, Bonegilla Migrant Experience, Swan Hill's Pioneer Settlement and Riverfront Experience and Greater Hume's Museum Trail.
<b>Nature based</b>	Secondary	The Murray Region is home to a range of National and State Parks. The most iconic Parks in the region include the Barmah and Murray Valley National Parks, Gunbower, as well as the Hattah-Kulkyne National Park, Mungo National Park and the Murray Sunset National Park.
<b>Business Events</b>	Secondary	Business events are a lucrative market for the region with opportunity to grow the sector in the major centres.
<b>Indigenous</b>	Emerging	There are some locations where there are opportunities to further develop Indigenous product, particularly in the National and State Parks such as Lake Mungo, Millewa, Gunbower, Barmah and Pental Island.
<b>Arts and Culture</b>	Emerging	Although the Murray is not recognised as an arts and cultural destination there has been growth in this product in recent years.
<b>Adventure</b>	Emerging	Adventure tourism remains an opportunity across the region, but product and attractions remain largely undeveloped.



## DMP FRAMEWORK

Key outcomes of the 2018 DMP to drive growth in the visitor economy include:

- A set of eight **Strategic Development Themes** that build on the framework of the 2012 DMP.
- A set of **Tier 1 Priority and Game Changer Projects** that will strengthen the destination and catalyse further investment and growth.
- A suite of **Destination Development Opportunities (Tier 2 and 3 projects)** to strengthen the tourism offering at the regional and local level.
- A number of **Regional Positioning Projects** to strengthen the region.

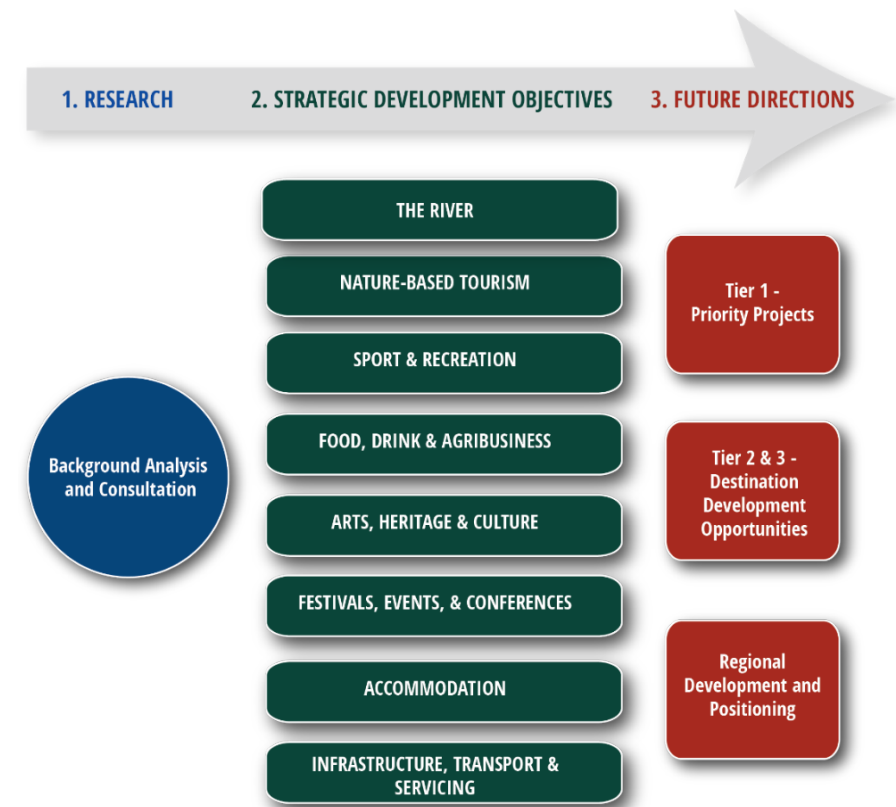
The Strategic Development Themes respond to contemporary opportunities and trends that include:

- Continued focus on the River as the key product of the Murray.
- Stronger focus on key nature-based assets as a priority for the region.
- The role of sport and recreation as a driver of visitation to the region.
- The rise of beverage tourism including distilleries, cideries and craft breweries, in addition to the wine industry, as well as reinforcement of the importance of quality food and agritourism.
- Growth of arts and cultural related infrastructure in the region and the need to develop a modern and contemporary interpretation of the region's heritage.
- Changes in consumer behaviour with visitors increasingly seeking more engaging, unique, and immersive tourism experiences.
- Continued investment and diversification in accommodation to meet projected demand and market expectations.
- Opportunities to capture a greater share of international visitation, particularly from key Asian growth markets.
- The need for ongoing investment in infrastructure including transport and visitor servicing infrastructure to keep pace with projected growth.

Visitation growth projections for the Murray Region show that by 2030, the region is expected to grow by:

- Additional 1.1 million overnight visitors.
- Additional 1.3 million daytrip visitors.
- Additional 90,000 international visitors.

This is considered a baseline growth scenario based on Victorian State growth projections, and assuming that the Murray Region will continue to capture a similar market share. Strategic development of product and infrastructure, as outlined in this plan, may encourage visitation growth beyond these projections.



## STRATEGIC DEVELOPMENT THEMES

The following outlines the Strategic Themes of the DMP, aligned projects, and corresponding Tier 1 Priority Projects. Projects highlighted in **red** are those of scale that can be considered potential game changers for the Murray Region.

**THEME 1: THE RIVER.** Promote and develop the river as the unique and essential element of the region's tourism offer, including passive, active and social uses of the river and its banks.

River related projects that are supported by the DMP include:

- Riverfront precinct and parklands enhancements and commercial activation.
- Boat ramps.
- Wharves and jetties.
- Water-based tour operators.
- Other water-based experiences.
- Interpretation of the Murray River.

SUB-REGION	PRIORITY PROJECT
Regional	<b>River Cruising</b>
Eastern Murray	<b>Gateway Island Tourism Development</b>
Mid Western Murray	<b>Kerang Lakes, Koondrook and Cohuna Waterfront Masterplans</b>
Western Murray	<b>Mildura Riverfront Masterplan Stage 2</b>
Mid Western Murray	Swan Hill Riverfront Masterplan Stage 2
Eastern Murray	Albury Riverside Precinct
Mid Eastern Murray	Yarrawonga Foreshore Improvements
Mid Eastern Murray	Tocumwal Foreshore Development
Mid Eastern Murray	Mulwala Foreshore Development
Central Murray	Deniliquin Riverfront Precinct
Western Murray	Wentworth Riverfront Development

**THEME 2: NATURE-BASED.** Ensure that nature-based assets deliver high quality activities and experiences through improvements to infrastructure and the development of innovative tourism products.

Nature based projects that are supported by the DMP include:

- Investment in parks infrastructure that support nature-based tourism such as roads, picnic areas, camping sites, toilets.
- Investment in walking and cycling trails.
- Cultural heritage interpretation.
- Educational tours and operators.
- Eco and adventure tour operators.

SUB-REGION	PRIORITY PROJECT
Regional	<b>Murray River Adventure Trail</b>
Central Murray	<b>Barmah National Park Tourism Investment Masterplan</b>
Central Murray	<b>Gunbower National Park Tourism Investment Masterplan</b>
Eastern Murray	Wonga Wetlands Development
Western Murray	Gateway to the Outback



**THEME 3: SPORT AND RECREATION.** Strengthen and increase the prominence of sport and recreation tourism in the Murray through facility renewal and attraction of new investment in infrastructure.

Sport and recreation projects that are supported by the DMP include:

- Investment in supporting golfing infrastructure such as club houses, food and beverage, and accommodation.
- Investment in sports and recreation facilities and infrastructure.
- Investment in sports clubs.
- Capacity building in event managers to host/run major competitions.

SUB-REGION	PRIORITY PROJECT
Western Murray	<b>Mildura Motorsports Precinct</b>
Eastern Murray	Albury Wodonga Sports Infrastructure Investment
Western Murray	Mildura South Regional Sports Precinct

**THEME 4: FOOD, DRINK AND AGRIBUSINESS.** Improve the Murray's food and drink offer by encouraging primary producers to develop tourism infrastructure, promoting the use of local produce and the development of diverse and unique dining experiences.

Food, drink and agribusiness projects that are supported by the DMP include:

- Investment in craft beverage facilities:
  - Cideries
  - Breweries.
  - Distilleries.
- Winery cellar doors and tourism facilities (accommodation, function centre etc)
- Destination dining businesses.
- Quality food establishments focusing on local produce.
- Agritourism, farm gate, and taste trails.
- New food and wine events.
- Capacity and workforce building in the hospitality sector.

SUB-REGION	PRIORITY PROJECT
Regional	<b>Murray Agri and Culinary Tourism Experience Development</b>
Mid Western Murray	Koondrook Butter Factory Arts Precinct and Murray River Brewery and Distillery
Mid Eastern Murray	Corowa Distilling Expansion Project

**THEME 5: ARTS, HERITAGE AND CULTURE.** Provide unique Murray heritage experiences through improvement and modernisation of existing heritage icons and strengthening heritage interpretation linked to Indigenous, military history, immigration, river trade and transport, pioneers and irrigation.

Arts, heritage and culture projects that are supported by the DMP include:

- Investment in heritage assets and improved interpretation.
- Repurposing heritage buildings and heritage sites for tourism use.
- Digital interpretation of heritage.
- Investment and expansion of art galleries.
- Investment and expansion of performance facilities.

SUB-REGION	PRIORITY PROJECT
Regional	<b>Ports of the Murray</b>
Central Murray	Echuca Moama Art Bridge
Central Murray	Port of Echuca Development
Mid Western Murray	Swan Hill Art, Indigenous and Cultural Precinct
Eastern Murray	Bonegilla Migrant Experience Stage 2

**THEME 6: FESTIVALS, EVENTS AND CONFERENCES.** Promote an increase in year-round visitation to the Murray through event facility investment and coordinated development and promotion of a series of events and conferences linked to the Murray's tourism strengths.

Festivals, events and conference projects supported by the DMP include:

- Events and festival infrastructure.
- Business event venues.
- Marketing of business events in the region.
- Utilising existing assets for business events.
- Visitor accommodation targeting the business events market.
- Development of new events and festivals, particularly outside of peak periods.

SUB-REGION	PRIORITY PROJECT
Eastern Murray	<b>Albury Entertainment Centre Redevelopment</b>
Central Murray	Echuca Visitor Events Precinct

**THEME 7: ACCOMMODATION.** To diversify the accommodation base in the Murray Region to appeal to a range of target visitor segments.

Accommodation projects that are supported by the DMP include:

- Reinvestment and repositioning motel accommodation to contemporary market need.
- Reinvestment in tourist parks to cater for family markets, e.g. self-contained cabins, family facilities etc.
- Infrastructure to ensure the ongoing sustainability of camping sites.
- Investment in interesting and motivational accommodation such as eco-tourism and wellness accommodation.
- Investment in large branded resorts and facilities.

SUB-REGION	PRIORITY PROJECT
Central Murray	<b>Echuca Moama Resort and Conference Centre</b>
Mid Western Murray	<b>Swan Hill Serviced Apartment / Quality Hotel</b>
Central Murray	Barmah Eco Resort
Mid East Murray	Silverwoods Yarrawonga
Western Murray	Wentworth Eco Resort

**THEME 8: INFRASTRUCTURE, TRANSPORT AND SERVICING.** Ensure that the Murray provides critical infrastructure to maintain and strengthen accessibility for visitors to the region.

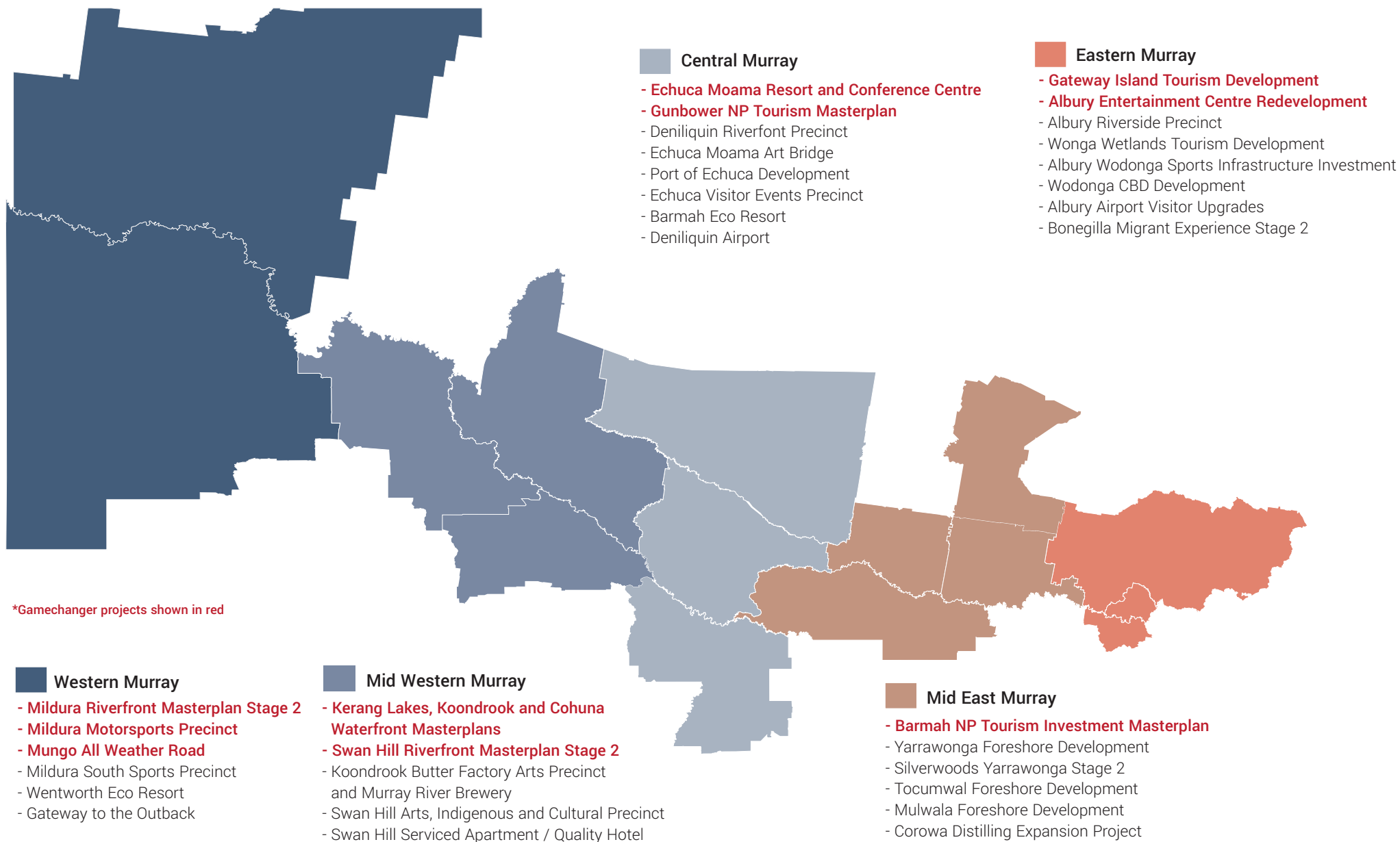
Infrastructure, transport and servicing projects that are supported by the DMP include:

- Bridges across the Murray River.
- Airport investment and upgrades to meet future demand.
- Road and highway investment such as lane widening, turning lanes, access roads etc. (e.g. Murray Valley Highway).
- Consistent signage.
- Improved telecommunications infrastructure and addressing regional blackspots.
- Digital infrastructure (e.g. Wi-Fi availability).
- Township gateway improvement.
- Township streetscape improvements.
- Improved visitor information services.

SUB-REGION	PRIORITY PROJECT
Regional	<b>Murray River Road</b>
Western Murray	<b>Mungo All Weather Road</b>
Eastern Murray	Wodonga CBD Development (Junction Place)
Eastern Murray	Albury Airport Visitor Upgrades
Central Murray	Deniliquin Airport
Regional	Passenger Rail Services to Major Centres
Regional	Contemporary Visitor Information Services



## SUMMARY OF PRIORITY PROJECTS BY SUB REGION



## MURRAY REGIONAL TOURISM PROJECTS

While it is MRT's role to advocate for investment in a range of tourism related projects across the region, many of the projects identified in this report require Local Government or other stakeholders to be the lead proponent. There are however a number of projects that MRT will take a lead role in. These include:

- **Murray River Road.** Continue to take a lead role in the delivery of the Murray River Road, an iconic touring route along the entire stretch of the Murray, beginning where the river rises in the Australian Alps and ending where it meets the ocean at Lake Alexandrina.
- **Murray River Adventure Trail.** Continue to take a lead role in the delivery of the Murray River Adventure Trail, a multi-sport adventure trail which extends along the length of the Murray River along NSW and Victoria.
- **Murray Agri and Culinary Tourism Experience.** Leading the implementation of the Murray Agri and Culinary Tourism Experience Program.
- **River Cruising.** Exploring the opportunity to develop and expand existing commercial cruise operators across the length of the river.
- **Contemporary Visitor Information Services.** Working with Local Governments to develop contemporary approaches to visitor information.
- **Contemporary Marketing Approach.** Development of a contemporary and aspirational approach to tourism marketing, and development of quality digital and social media content.
- **VFR Program.** Development of a program to increase yield from the important VFR market.
- **Events Strategy Delivery.** Implementation of the key directions of the Murray Region Events Strategy.
- **Indigenous Tourism Capacity Building.** Work with regional partners to grow Indigenous tourism opportunities and implement the Hume Aboriginal Cultural Trail Study.
- **Commercial Tour Operator Attraction.** Working to address the barriers to entry for new commercial tour operations.
- **Industry Performance Monitoring.** An annual assessment of the health of the region's tourism industry using a consistent set of measures.
- **Industry and Workforce Development.** Working with regional partners to address industry and workforce issues.
- **Cross Border Governance and Leadership.** Continue to work closely with Local Government, and various Victorian and NSW authorities to resolve cross-border inconsistencies and investment barriers.
- **Regional Tourism Governance.** Collaborating with LGAs, State Governments, and regional tourism networks to ensure efficient tourism governance, and a combined advocacy platform.

# 1. INTRODUCTION

## 1.1. PROJECT SCOPE AND OBJECTIVES

Murray Regional Tourism (MRT) commissioned an update to the existing Destination Management Plan (DMP) for the Murray Region. The revised DMP builds on the outcomes of the 2012 DMP to provide an updated five-year strategic approach to prioritising key tourism experiences and current product development opportunities in the region. It will refresh the existing framework to continue to drive visitation and economic growth in the region.

The key objectives of the project include the following:

- Review of the past DMP:
  - Progress and outcomes of identified projects;
  - Assessment of performance indicators (investment, visitation, activities undertaken, and spend).
- Consultation and information gathering:
  - In-region consultation;
  - Identification of investment projects;
  - Benchmarking with other regions;
  - Issues and opportunities analysis;
- Preparation of 2018-2022 Murray DMP:
  - Establishment of product and infrastructure which will grow tourism;
  - Assessment of projects;
  - Prioritisation of projects;
  - Profile of priority projects.

The Murray Region DMP Update has been undertaken concurrently with the Riverina Murray DMP in conjunction with Destination Riverina Murray (DRM).

## 1.2. THE REGION

MRT is the only Regional Tourism Organisation (RTO) in Australia that includes areas within two states, Victoria and NSW. MRT provides overarching tourism strategy, a clear developmental direction, focused product development and support for visitor economy related infrastructure.

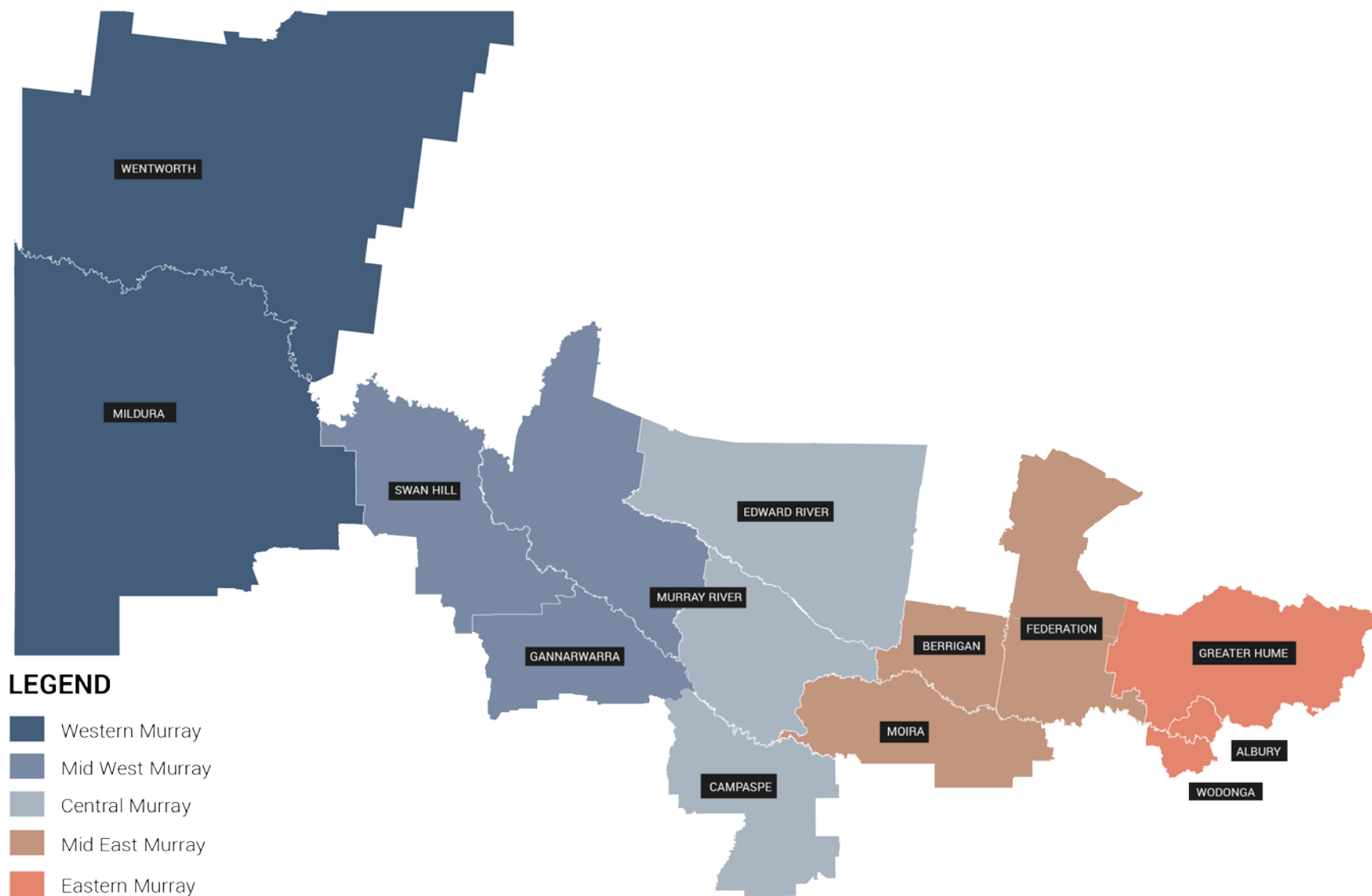
MRT was established in 2010 in partnership with Destination NSW, Visit Victoria and local government councils in the Murray region.

The Councils that form the MRT region have been organised into five sub-regions for analysis as summarised in Table 1, and shown in Figure 1 overleaf.

**TABLE 1** MURRAY SUB-REGIONS

SUB-REGION	LGAs
Eastern Murray	Greater Hume (NSW), Albury (NSW), Wodonga (Vic)
Mid Eastern Murray	Moira (Vic), Berrigan (NSW), Federation (NSW)
Central Murray	Campaspe (Vic), Edward River (NSW), Murray River (eastern half) (NSW)
Mid Western Murray	Swan Hill (Vic), Gannawarra (Vic), Murray River (western half) (NSW)
Western Murray	Mildura (Vic), Wentworth (NSW)

**FIGURE 1** MURRAY REGION





### 1.3. INTEGRATION WITH DESTINATION RIVERINA MURRAY

Murray Regional Tourism (MRT) and Destination Riverina Murray (DRM) have partnered to develop two complimentary DMPs. This Plan covers the cross-border locations and experiences in NSW and Victoria and encompasses the MRT member council areas (shown in Figure 1). The Riverina Murray DMP is primarily focused on the NSW region covering the Destination Network's administrative boundaries.

The Plans are considered the key strategic documents for the region and provide the blueprint for future tourism growth, identifying projects and related infrastructure developments to encourage both private and public-sector investment in the industry.

### 1.4. CONSULTATION

Consultation with government and industry stakeholders is a key part of the DMP process. Consultation activities undertaken include:

- In-region consultation in six strategic locations including separate workshops with government and industry (12 in total). This included workshops in:
  - Swan Hill
  - Albury Wodonga
  - Echuca Moama
  - Mildura
  - Yarrawonga Mulwala
  - Deniliquin
- Workshop with DNSW and NSW State Government stakeholders.
- Workshop with Visit Victoria and Victorian Government stakeholders.
- Workshop with MRT Board.
- Online survey of LGA stakeholders and tourism industry.

In addition to consultation, information was requested from MRT partner Councils on:

- Tourism-related investment over the past five years.
- Current and future tourism investment projects which should be considered in the DMP.

### 1.5. PLAN LAYOUT

#### PART A – BACKGROUND TO THE 2018 DMP

The Background section provides a summary of the following:

- Review of 2012 DMP outcomes and progress.
- Analysis of visitor trends over the past decade using TRA data and key target markets using information from Visit Victoria and DNSW.
- Review of tourism product and experiences across the region.

#### PART B: DMP FRAMEWORK

Focuses on the core product development initiatives for the region including:

- An overview of the Strategic Development Themes that respond to the needs of the tourism sector.
- A summary of the Project Assessment Methodology, and how project opportunities are prioritised.
- Priority Project profiles.
- A profile of region-wide positioning projects which will strengthen the regional approach to tourism.

#### PART C: SUB-REGION PROFILE

A profile of each sub-region including:

- Review of tourism product and visitor experience.
- Visitor profile summary.
- Summary of priority projects and destination development opportunities.



# PART A: BACKGROUND





## 2. DMP REVIEW

### 2.1. INTRODUCTION

This section provides a summary of the outcomes of the 2012 Murray DMP. A full detailed review has been developed as a separate report. Information has been sourced from MRT and member Councils.

The review identified **\$372 million** 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.

This 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)**.

#### Endorsement of 2012 DMP

*"We saw a gap in the market for a small conference and event facility in Echuca Moama. The Murray Destination Management Plan provided valuable market analysis to support our business case and we were successful in securing funding through a Destination NSW grant to develop our Riverpoint 1703 conference centre."* Michelle and Ben Hearn, Owners, Cadell on the Murray

### 2.2. PROJECT REVIEW

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

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

A review of projects was undertaken using information provided by MRT Councils and desktop research. Based on information provided by Councils, since 2012 the region has attracted over **\$372 million** in investment into tourism-related projects. This includes:

- **\$176 million** in public-private partnership projects.
- **\$149 million** of private investment.
- **\$47 million** in public investment.

This is a conservative estimate of actual investment in tourism in the region as there were a number of investments (refurbishments, expansions etc) which were not captured in the review.

**TABLE 2** PRIORITY PROJECT REVIEW

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 a number of 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.
	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.



## 2.3. INVESTMENT IMPACT

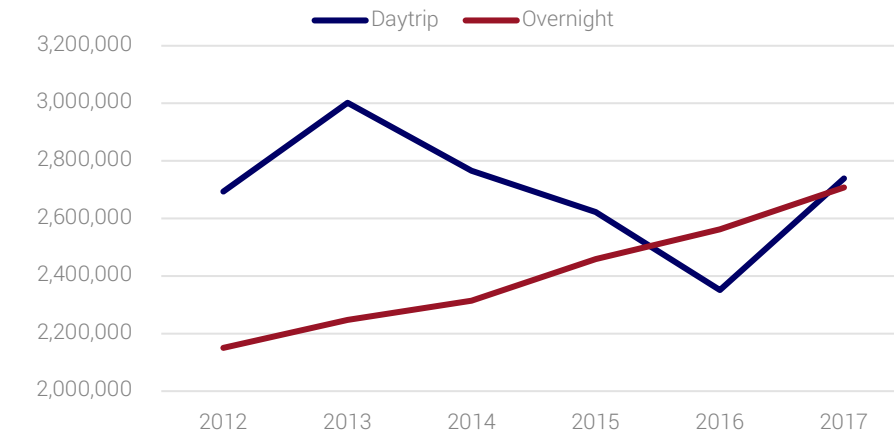
The following is a high-level assessment of the performance of the Murray River's tourism industry between 2012 and 2017.

### VISITATION

Overnight visitation has increased significantly by an additional 557,000 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.

**FIGURE 2** MURRAY REGION VISITATION 2012–2017



Source: TRA NVS & IVS Visitation 2012–2017

<sup>1</sup> Based on 2016 Census Employment data

### VISITOR EXPENDITURE AND EMPLOYMENT

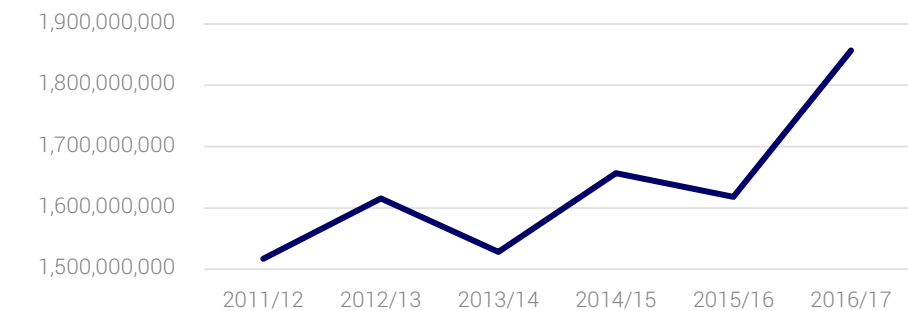
The significant growth in overnight visitors has facilitated greater expenditure in the region, with an additional \$339 million in visitor expenditure in the regional economy. This has supported an additional 4,569 jobs in the visitor economy (direct and indirect). The 24,968 tourism related jobs (indirect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

**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 3** MURRAY REGION DIRECT VISITOR EXPENDITURE 2012–2017



Source: TRA NVS & IVS Visitation 2012–2017

## 3. VISITOR PROFILE

### 3.1. INTRODUCTION

This section provides an assessment of the Murray's visitor profile including key trends over the past decade, and a demographic profile of visitors. The detailed findings and description of methodology is provided in Appendix B.

#### SUMMARY OF VISITATION TO MURRAY REGION (2017)

<b>2,739,000</b> DOMESTIC DAYTRIP VISITORS	<b>2,707,000</b> DOMESTIC OVERNIGHT VISITORS	<b>65,000</b> INTERNATIONAL VISITORS
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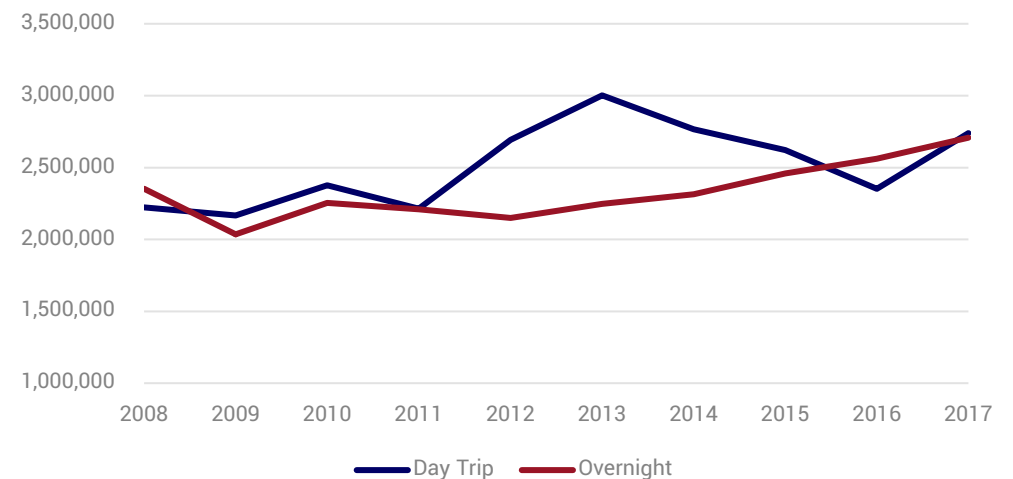
### 3.2. MURRAY REGION VISITATION TRENDS

#### 3.2.1. DOMESTIC VISITOR TRIPS

Figure 4 shows total domestic visitor trips to the Murray Region between the 2008 and 2017 financial years, including a breakdown of daytrips and overnight trips.

Domestic visitor trips to the Murray Region have been steadily growing with over 5.4 million visitor trips in 2017, an increase of approximately 930,000 visitors since 2008 (representing 21% growth over the last decade). The majority of this growth has occurred since 2012.

**FIGURE 4** MURRAY REGION VISITATION 2008–2017



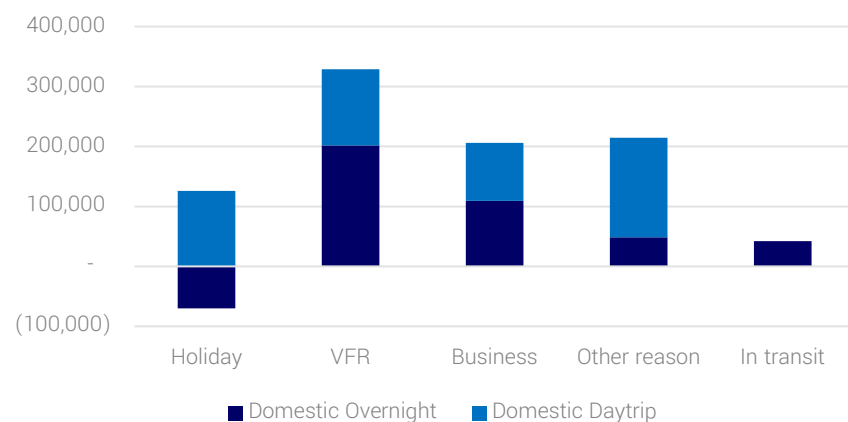
Source: TRA, NVS, Visitation Financial Years 2008–2017

### 3.2.2. CHANGE IN DOMESTIC VISITOR PURPOSE

Figure 5 provides an analysis of additional domestic visitor trips between 2008 and 2017 by purpose of visit.

The markets which showed the most significant growth include VFR (Visiting friends and relatives), visitors for 'Other Reasons' and Business visitors. 'Other Reason' for visit includes employment, education, medical, personal appointments, and other day-to-day activities. It demonstrates the growing importance of the broader visitor economy in driving visitation to the region, and is likely concentrated in the major centres that have grown in economic importance in recent years (e.g. Albury Wodonga, Mildura Wentworth, Echuca Moama)

**FIGURE 5** ADDITIONAL VISITORS 2008–2017 BY PURPOSE

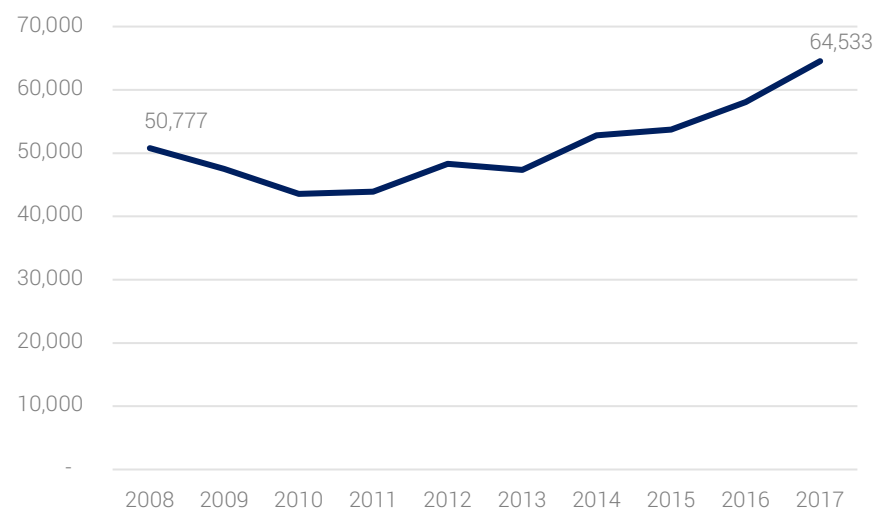


Source: TRA, NVS, Visitation Financial Years 2008–2017

### 3.2.3. INTERNATIONAL VISITOR TRIPS

The Murray Region attracted almost 65,000 international overnight visitor trips in 2017. International visitation represents a small proportion of total visitation to the Murray, however, is an important market to consider in terms of visitation and yield. International visitor trips have grown since 2008, by almost 14,000 trips.

**FIGURE 6** INTERNATIONAL VISITATION (OVERNIGHT)



Source: TRA, IVS, Visitation Financial Years 2008–2017

### 3.3. VISITATION PROJECTIONS

#### METHOD

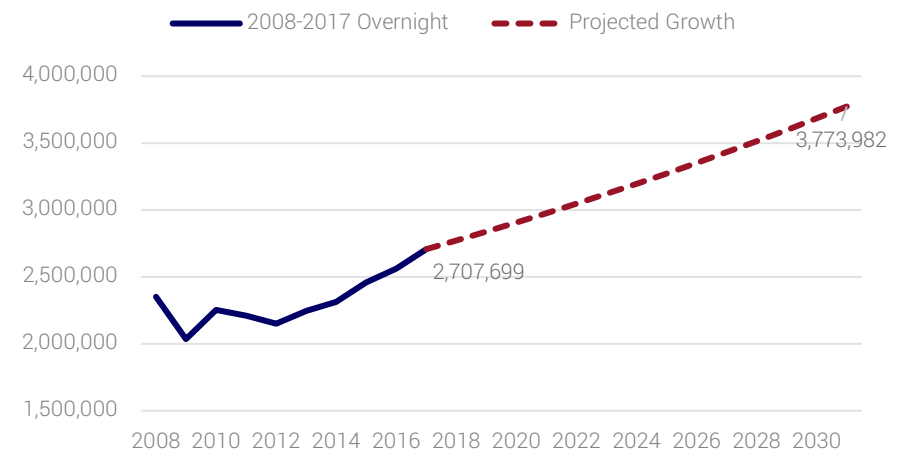
The following provides an estimate of visitor trips to the Murray Region to 2030 based on published Visit Victoria growth rates for domestic overnight and daytrips and international overnight trips. Projections for NSW have also been considered as part of the assessment<sup>2</sup>, however, as the Victorian side of the Murray currently attracts a larger share of visitation, Visit Victoria projections have been adopted for the region.

It is important to note that the following projections are considered a 'baseline' scenario that aligns with State growth projections, assuming that the Murray Region will continue to capture the same market share. However, through strategic investment, as outlined in this DMP, there is opportunity to grow the Murray Region's market share and drive further growth beyond these projections.

#### DOMESTIC OVERNIGHT VISITOR TRIP PROJECTION

Figure 7 shows projected domestic overnight trips to the Murray Region. Visit Victoria projects overnight visitation to grow by an average of 2.4% per annum to regional Victoria to 2030. The chart shows that by 2030 the Murray Region is projected to attract over 3.7 million overnight trips, which is growth of an additional 1 million overnight trips over the period 2017–2030.

**FIGURE 7** MURRAY REGION OVERNIGHT VISITOR PROJECTION



Source: TRA NVS & IVS Visitation 2007–2017 YE June & Visit Victoria Tourism Forecasts

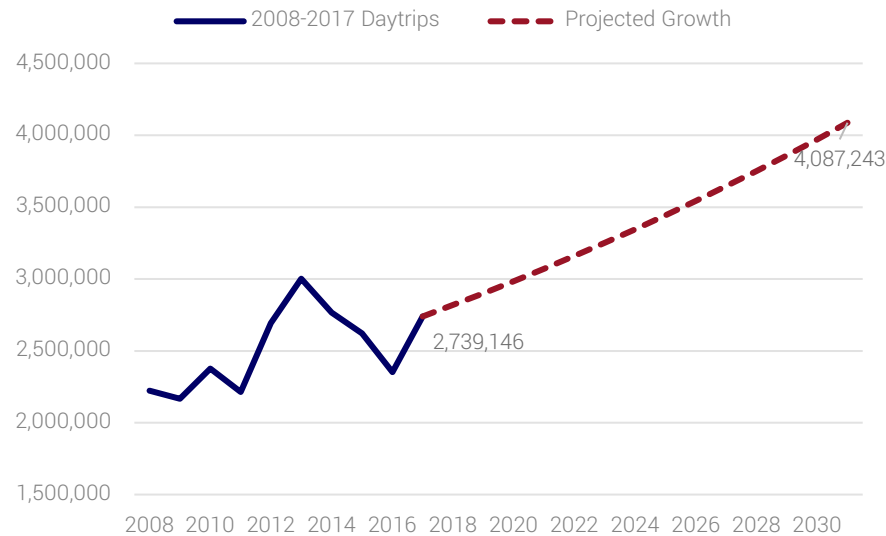
<sup>2</sup> Based on TRA Tourism Forecasts, August 2017



## DOMESTIC DAYTRIPS PROJECTION

Figure 8 shows projected domestic daytrips to the Murray Region. The chart shows that by 2030 the Murray Region is projected to attract over 4 million daytrips, which is growth of an additional 1.3 million daytrips over the period 2017–2030.

**FIGURE 8** MURRAY REGION DAYTRIP VISITOR PROJECTION

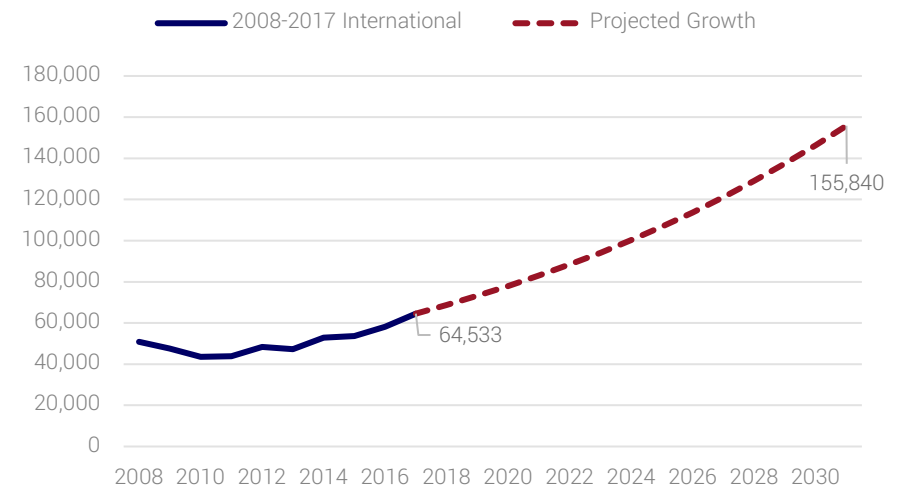


Source: TRA NVS & IVS Visitation 2007–2017 YE June & Visit Victoria Tourism Forecasts

## INTERNATIONAL VISITOR TRIP PROJECTIONS

Figure 9 shows projected international visitation to the Murray Region. By 2030 the Murray Region is projected to attract over 155,000 international visitor trips, which is growth of over 90,000 international visitor trips over the period 2017–2030. For this growth to be realised, it is important that new products and experiences are developed, and infrastructure investment keeps pace with the growth of the region.

**FIGURE 9** MURRAY REGION INTERNATIONAL VISITOR PROJECTION



Source: TRA NVS & IVS Visitation 2007–2017 YE June & Visit Victoria Tourism Forecasts

Analysis for Victoria indicates that China is estimated to generate 53% of Victoria's total international expenditure in the year 2024–25 and is expected to contribute 70% of the forecast total international visitor expenditure growth over the next decade.

At the national level, the latest visitor projections estimate inbound Asian markets to grow by 17.4% over the next two years alone, and contribute to 64% of all international visitors growth.<sup>3</sup> This underscores the importance of this market and the need to develop tailored product and experiences.

**TABLE 4** VICTORIA INTERNATIONAL VISITOR FORECAST 2015–2025

	2015	2025	GROWTH
China	439,000	1,494,000	+1,055,000
New Zealand	313,000	424,000	+111,000
United Kingdom	210,000	279,000	+69,000
United States	166,000	268,000	+102,000
Malaysia	116,000	189,000	+73,000
India	98,000	217,000	+119,000
Singapore	98,000	153,000	+55,000
Germany	79,000	102,000	+23,000
Hong Kong	76,000	121,000	+45,000
Indonesia	54,000	81,000	+27,000
Canada	47,000	70,000	+23,000
Japan	45,000	67,000	+22,000
France	45,000	57,000	+12,000
Korea	40,000	60,000	+20,000
Thailand	26,000	35,000	+9,000
<b>Total</b>	<b>2,274,000</b>	<b>4,170,000</b>	<b>+1,896,000</b>

Source: Visit Victoria Forecast Visitation 2016 Issue

<sup>3</sup> Tourism Research Australia, Tourism Forecasts August 2017

### 3.4. MURRAY SUB-REGIONS

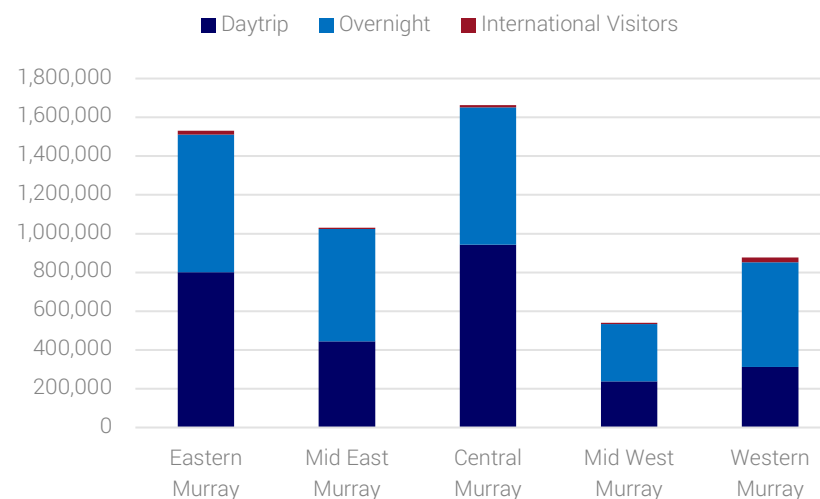
The following provides an assessment of visitation to the Murray's sub-regions, including Eastern, Mid-East Murray, Central Murray, Mid-West Murray and Western Murray.

#### 3.4.1. VISITATION

##### VISITATION BY SUB-REGIONS

Central Murray attracted the highest number of visitor trips, followed by Eastern Murray.

**FIGURE 10** VISITATION BY MURRAY REGION SUB-REGION

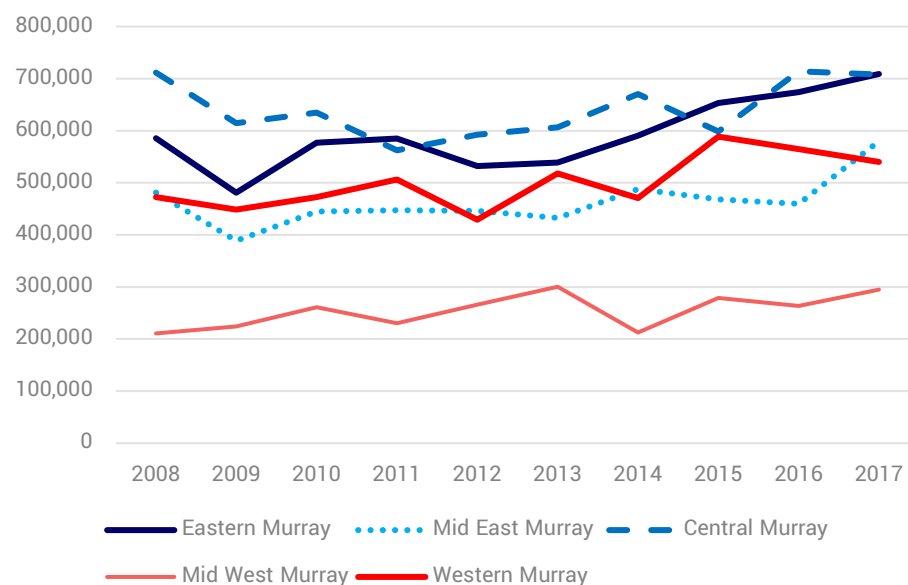


Source: TRA, NVS and IVS, Visitation Financial Years 2008–2017

## DOMESTIC OVERNIGHT VISITATION BY SUB-REGION

Figure 11 shows domestic overnight visitor trips to the Murray by sub-region. All sub-regions have shown a steady increase in domestic overnight visitation since 2008, except for the Central Murray which has steadily grown to visitor levels recorded in 2008.

**FIGURE 11** OVERNIGHT VISITATION BY MURRAY REGION SUB-REGION



Source: TRA, NVS, Visitation Financial Years 2008–2017

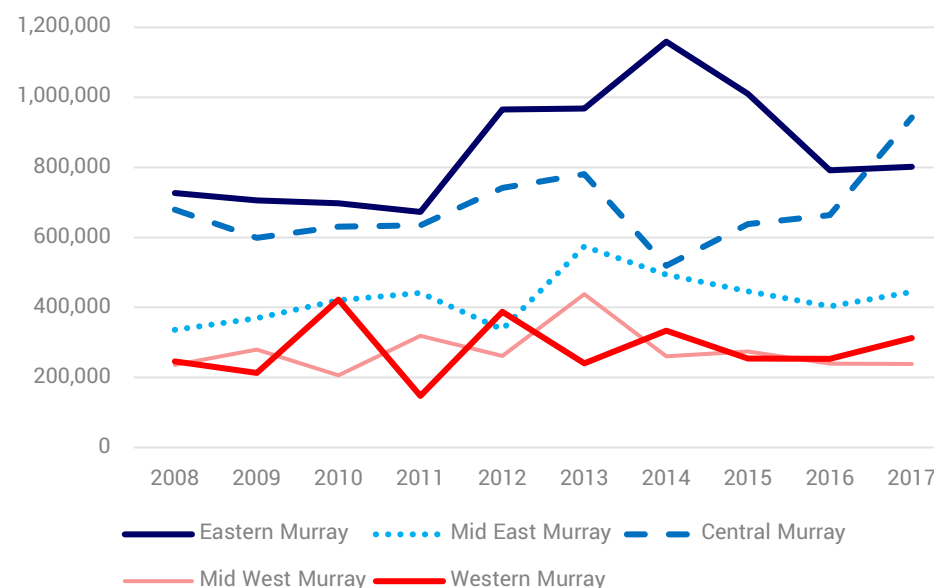
## DOMESTIC DAYTRIP VISITATION BY SUB-REGION

Figure 12 shows domestic daytrips to the Murray sub-regions. Domestic daytrip visitor trips are generally more sporadic when compared to domestic overnight trips.

In 2017, the sub-regions that recorded the highest number of daytrip visitors included Central Murray and Eastern Murray, followed by Mid-Eastern Murray, Western Murray and Mid-West Murray.

Sub-regional daytrip visitation has generally been trending up since 2008. Central Murray increased significant between 2016 and 2017.

**FIGURE 12** DAYTRIP VISITATION BY MURRAY REGION SUB-REGION



Source: TRA, NVS, Visitation Financial Years 2008–2017

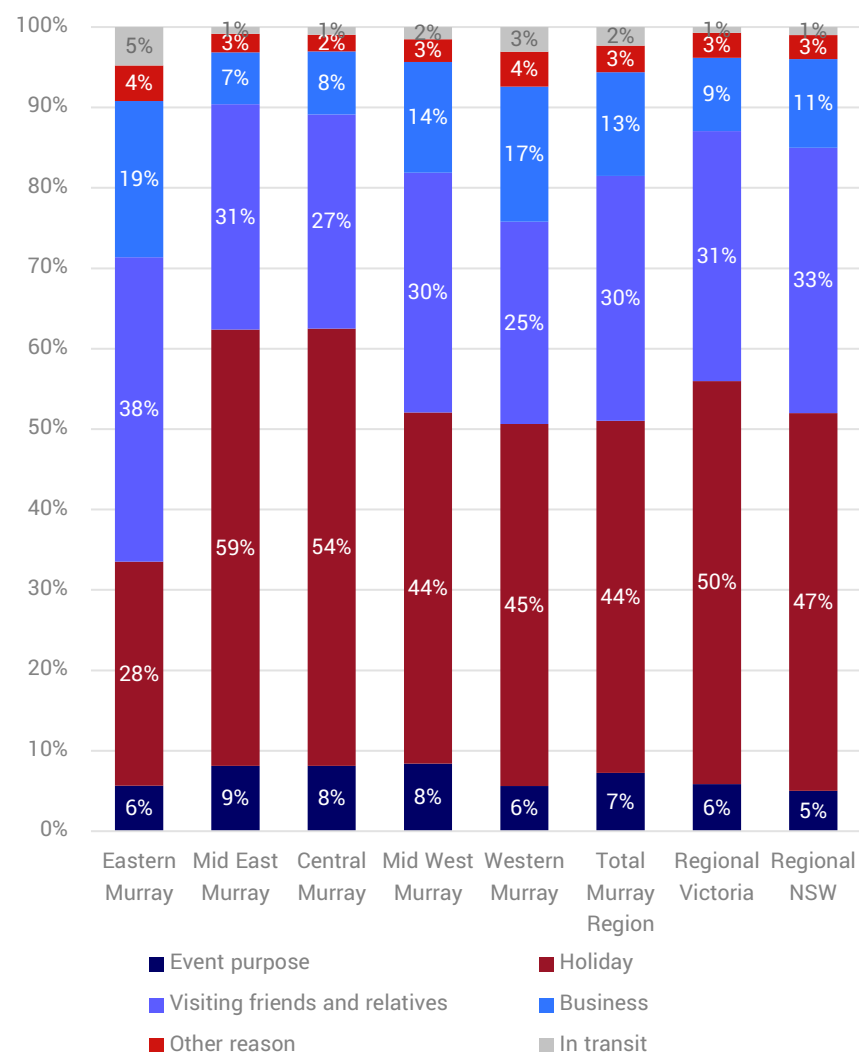
## DOMESTIC OVERNIGHT PURPOSE OF VISIT BY SUB-REGION

Figure 13 shows the proportion of domestic overnight visitor trips to the Murray by sub-region compared with regional Victoria and regional NSW. Across all sub-regions, the majority of domestic overnight visitors are visiting for a holiday (48%) or visiting friends and relatives (33%). The visitor profile of purpose of visit to the Murray Region is similar to regional Victoria.

Key points of difference from the regional average include:

- Mid-East Murray and the Central Murray attract a higher proportion of holiday visitors, and a lower proportion of business visitors.
- The Eastern Murray attracted a higher proportion of VFR visitors and business visitors and a lower proportion of holiday visitors (compared with regional Victoria).
- The Eastern Murray, Western Murray and Mid-West Murray attracted the highest proportion of business visitors.

**FIGURE 13** VISITOR PURPOSE BY SUB-REGION (OVERNIGHT)



Source: TRA, NVS, Visitation Financial Years 2008–2017

### 3.4.2. VISITOR ORIGIN

Table 5 shows the origin of domestic overnight visitors by sub-regions of the Murray. The majority of domestic overnight visitors to the Murray Region originate in Melbourne (40%), followed by regional Victoria (26%). The Western Murray draws strongly from South Australia (25% of overnight visitation).

**TABLE 5** VISITOR ORIGIN BY SUB-REGION (OVERNIGHT VISITORS)

	EASTERN MURRAY	MID EAST MURRAY	CENTRAL MURRAY	MID WEST MURRAY	WESTERN MURRAY	TOTAL MURRAY REGION
Sydney	15%	3%	3%	3%	5%	6%
Regional NSW	23%	10%	8%	8%	14%	13%
Melbourne	30%	56%	51%	35%	25%	40%
Regional VIC	18%	24%	30%	41%	25%	26%
ACT	5%	1%	1%	0%	1%	2%
Adelaide	1%	1%	2%	4%	16%	4%
Regional SA	1%	1%	1%	4%	9%	3%
Other	7%	4%	5%	6%	5%	5%

Source: TRA, NVS, Visitation Financial Years 2008–2017

### 3.4.3. INTERNATIONAL VISITOR ORIGIN

Table 6 shows the origin of international visitors to the Murray Region, benchmarked with visitors to Regional Victoria and Regional NSW.

The majority of visitors to the Murray Region are from the UK. New Zealand is also a key international origin market.

Visitation from Asian markets is currently low (particularly from China). This is considered an important tourism growth market for Australia, with opportunity to develop targeted product.

**TABLE 6** INTERNATIONAL VISITOR ORIGIN

	Murray Region	Regional Victoria	Regional NSW
<b>COUNTRIES</b>			
UK	19%	19%	21%
New Zealand	17%	14%	13%
USA	9%	9%	10%
Germany	7%	8%	8%
Canada	3%	3%	5%
China	3%	6%	4%
<b>REGIONS</b>			
Total Europe & UK	45%	43%	47%
Total North America	12%	12%	15%
Total Asia	24%	26%	19%

Source: TRA, IVS, Visitation Financial Years 2008–2017



### 3.4.4. VISITOR DEMOGRAPHICS

The following provides an assessment of the key demographics of visitors to the Murray by sub-region.

#### TRAVEL PARTY

Table 7 shows the travel party type of domestic overnight visitors to the Murray by sub-region.

Across the region, 'Adult Couples' are the most common type of visitor (31%), followed by 'Family Groups' (21%) and 'Sole Travellers' (21%) and 'Friends or Relatives Travelling without Children' (16%). The profiles are generally consistent across the sub-regions.

The Western, Eastern, and Mid-West Murray sub-regions have a higher proportion of solo travellers which is the likely result of high business and VFR travel.

**TABLE 7** TRAVEL PARTY BY SUB-REGION (OVERNIGHT)

	EASTERN MURRAY	MID EAST MURRAY	CENTRAL MURRAY	MID WEST MURRAY	WESTERN MURRAY	TOTAL MURRAY REGION
Adult couple	31%	35%	32%	31%	34%	31%
Family group - parents and children	20%	21%	23%	23%	18%	21%
Travelling alone	28%	16%	16%	21%	21%	21%
Friends or relatives travelling together - without children	11%	19%	19%	16%	16%	16%
Friends or relatives travelling together - with children	3%	5%	6%	4%	4%	5%
Business associates travelling together - without spouse	5%	2%	2%	4%	4%	3%
Non-school sporting group/community group or club	1%	2%	2%	1%	1%	1%

Source: TRA, NVS, Visitation Financial Years 2008–2017

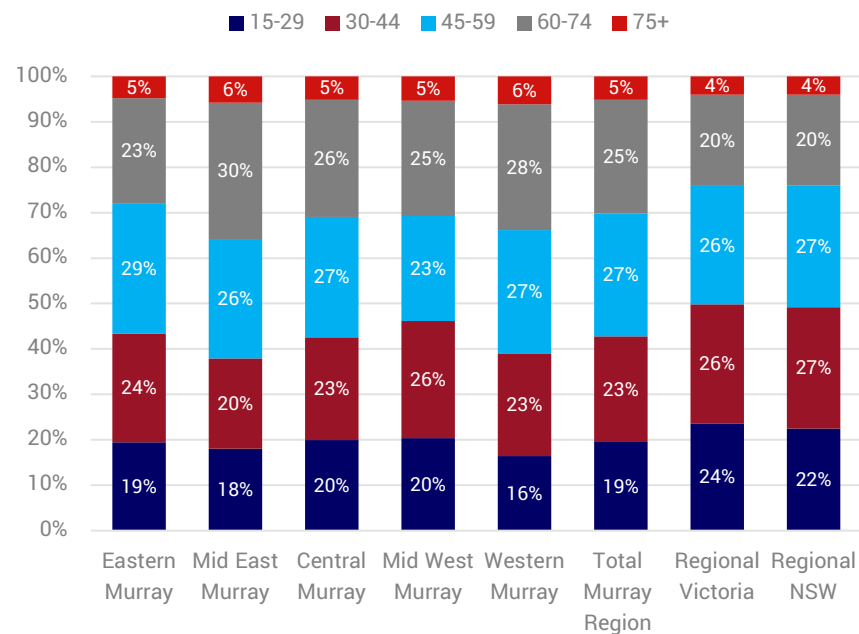
## AGE PROFILE

Figure 14 shows the age profile of domestic overnight visitors to the Murray by sub-region.

Across the region, the majority of visitors are aged between 30–34 years (30%), 45–59 years (27%) and 60–74 years (25%). The Murray Region attracts a higher proportion of older visitors aged 60+ years and a lower proportion of visitors aged under 44 years, when compared to regional Victoria and NSW.

Mid-East Murray and Western Murray attract the highest proportion of visitors aged 60+ years, while the Mid-West, Eastern Murray and Central Murray attract the highest proportion of visitors aged under 44 years.

**FIGURE 14** VISITOR AGE PROFILE (OVERNIGHT)



Source: TRA, NVS, Visitation Financial Years 2008–2017

## 3.4.5. VISITOR ACTIVITIES

Table 8 shows the top 20 activities undertaken by overnight visitors to the Murray by sub-region. Across the region, the top 5 activities undertaken include to eat out/dine out at restaurants (54%), visit friends and relatives (41%), pubs, clubs and discos (27%), sightseeing/looking around (24%) and going shopping for pleasure (20%).

The table shows that the popularity of the order of these activities is consistent across the sub-regions.

**TABLE 8** TOP 20 VISITOR ACTIVITIES BY SUB-REGION (OVERNIGHT)

	EASTERN MURRAY	MID EAST MURRAY	CENTRAL MURRAY	MID WEST MURRAY	WESTERN MURRAY	TOTAL MURRAY REGION
Eat out / dine at a restaurant and/or cafe	54%	53%	53%	44%	54%	54%
Visit friends & relatives	45%	39%	37%	41%	33%	41%
Pubs, clubs, discos etc	22%	32%	31%	23%	23%	27%
Sightseeing/looking around	18%	26%	27%	22%	26%	24%
Go shopping for pleasure	19%	18%	21%	16%	22%	20%
Fishing	2%	12%	11%	13%	8%	9%
Bushwalking / rainforest walks	4%	9%	10%	7%	8%	8%
Picnics or BBQs	4%	8%	7%	8%	6%	7%
Water activities / sports	2%	10%	9%	6%	4%	6%
Visit national parks / state parks	3%	7%	6%	6%	9%	6%
Go to markets	3%	8%	8%	3%	6%	6%
Exercise, gym or swimming	4%	8%	7%	6%	4%	6%
Visit wineries	4%	8%	5%	1%	6%	5%
Visit history / heritage buildings, sites or monuments	4%	3%	7%	5%	5%	5%
Golf	2%	11%	5%	4%	3%	5%
Go on a daytrip to another place	5%	6%	4%	4%	4%	5%
Visit museums or art galleries	4%	3%	5%	5%	5%	5%
Play other sports	3%	4%	5%	4%	3%	4%
Charter boat / cruise / ferry	0%	2%	8%	3%	5%	4%
Attend an organised sporting event	3%	4%	4%	4%	2%	3%

Source: TRA, NVS, Visitation Financial Years 2008–2017

## 4. KEY MARKETS

### 4.1. INTRODUCTION

This section provides an assessment of key tourism markets for the Murray Region, using information and data from Visit Victoria and DNSW.

The descriptions of the market segments in this section are based on information sourced from Visit Victoria and DNSW, as well as previous work undertaken by Urban Enterprise.

### 4.2. KEY VISITOR MARKETS

#### VISITING FRIENDS AND RELATIVES (VFR)

The VFR market is recognised as a key visitor market, particularly for regional areas. 35% of all overnight domestic visitors to the Murray are for the purposes of visiting friends and relatives. Research by DNSW has highlighted the important role that VFR hosts play influencing trip activities and itinerary recommendations.<sup>4</sup> It is vital to equip hosts with necessary information to positively stimulate interest in the Murray and act as ambassadors for the region. It is also important to note that VFR hosts are likely to actively participate in tourism related activities and contribute to local expenditure.

#### GREY NOMADS

Grey Nomads are a key market, attracted to the Murray for riverside camping and the warm climate. The region includes a number of major highways which are popular routes and stopping points for caravaners undertaking long trips. This market can be perceived as relatively low yielding; however, they are very important to smaller towns,

particularly those that are RV friendly. This market is expected to increase in the future in terms of both size and spending power due to an ageing population with high levels of disposable income. This is evidenced by data indicating that Australians over the age of 55 account for 32% of the nation's gross disposable income.<sup>5</sup>

#### FAMILIES

Families are a core market for the region with approximately 18% of overnight visitors travelling as a family group (parents and children). It is important that investment in family experiences and attractions is encouraged to grow this market, as well as catering to the growing population of young families in the region's major centres. An important consideration for this market is value for money, convenience, and accessibility.

The region's camping and caravan parks are an important draw for this market, and it is important that reinvestment and improvements to the regions' parks is encouraged and facilitated.

#### BUSINESS

Business-related travel accounts for 14% of all overnight visitors to the region. The Murray includes a number of major centres and regional towns which support a large business base and facilitate high levels of business travel. Business travellers are generally considered high yielding and are particularly important for the accommodation sector in driving mid-week and off-peak occupancy. It also provides the opportunity to generate repeat visitation by encouraging business travellers to return for leisure purposes with their families.

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<sup>4</sup> DNSW, VFR Host Research March 2016

<sup>5</sup> DNSW Over 55s Travel to NSW May 2015

## WORKING HOLIDAY MAKERS (WHM)

The Murray is a major agricultural region that attracts large numbers of WHM. Research by DNSW shows that in 2017 NSW received 212,000 working holiday makers, spending \$1.1 billion in the NSW economy.<sup>6</sup> Many WHM stay in a particular destination for a minimum of 88 days to fulfil visa extension requirements. More can be done to further engage with this market to increase yield. Mildura Regional Development is currently developing a backpacker strategy.

## EVENTS AND FESTIVALS VISITORS

Consultation with industry identified the importance of events and festivals in driving visitation. It also provides the opportunity to showcase the region to new markets and encourage intra-regional travel. Sporting events and festivals are identified as a particular strength of the region, with regional and national competitions allowing for increased length of stay.

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<sup>6</sup> DNSW Working Holiday Makers to NSW, March 2017

## 4.3. EMERGING VISITOR MARKETS

In addition to the existing core markets for the region there is an opportunity to develop product and experiences targeted at new markets.

### MILLENNIALS / YOUNG TRAVELLERS

This market segment includes people aged 15–29, as well as those aged 30–34 who do not have children.<sup>7</sup> Compared with other regions, the Murray currently receives a lower proportion of visitors aged under 35 years. Research undertaken by DNSW shows that there is currently low awareness of regional tourism destinations among millennials. Key factors affecting their travel choices include:

- Profoundly influenced by technology and social media.
- Seeking authentic information rather than staged advertising.
- Reliant on recommendations from friends and family, as well as social media.
- Distance is not a major barrier.

They are seeking genuine and authentic experiences, together with a variety of active and informative ways to enjoy them. This includes experiences such as:

- Events that allow discovery of a location in a unique way.
- Nature and landscapes.
- Experiences that are unique to a specific area.
- Food and lifestyle.
- History of a destination with a contemporary or personalised interpretation.

### INTERNATIONAL MARKETS

International visitors make up just over 1% of total visitors to the Murray. There is opportunity to grow international visitation through targeted product development and marketing, with consideration to the following segments:

<sup>7</sup> Note millennials is typically defined as persons aged 15 – 29, however research has included persons aged 30–34 who don't have children. Tourism Research Australia, in partnership with DSNW, Attracting Millennials to Regional New South Wales, November 2017

- **International experience seeker/self-drive market** - is identified as a key market by Tourism Australia. Experience seekers are not characterised by nationality but seek out authentic experiences which are engaging and have an educational element. They are more likely to visit regional areas, stay longer in the region, and are less attracted to 'mass packaged tourism products'. At present they do not make up a large portion of visitation to the region, however, there is an opportunity to develop personalised experiences using the region's strengths in Indigenous culture, rural Australian character, and nature-based assets.
- **Asian visitor markets** - the Murray Region's market share of the growing Asian visitor markets is currently low. In terms of inbound arrivals, Asia is expected to continue to outperform other overseas markets, brought about by increasing prosperity and the continuing transition of millions of people into consumer oriented, middle-class populations. At the national level, the latest visitor projections are for inbound Asian markets to grow by 17.4% over the next two years alone, and contribute to 64% of all international visitor growth.<sup>8</sup>

The number of independent and self-drive Asian visitors has increased in recent years and will provide new opportunities for regional destinations. There are a number of specific product opportunities which could leverage this market (e.g. Port of Echuca).

Lake Tyrell, located just outside the Murray region near Swan Hill, has experienced an influx of Chinese visitors taking photos of the lake surface which has been driven by word of mouth and social media. Working with other tourism regions in central Victoria which are also targeting the Asian market (i.e. Ballarat, Bendigo) to develop packages may also be considered.

## LIFESTYLE LEADERS

Visit Victoria has identified Lifestyle Leaders as a segment that drives a large proportion of visitation and expenditure in the State. The preferences and behavioural characteristics of this segment have underpinned Visit Victoria marketing and promotions in recent years (e.g. Wander Victoria campaign). Lifestyle Leaders are based on a mindset, are found in all regions, ages and lifecycle groups, and represent approximately a third of the Australian population aged 18+.

Lifestyle Leaders are educated, professional and progressive individuals who enjoy seeking out new information and being the first to try new products. They have a higher level of discretionary expenditure than the general population, so they can afford to indulge more often in travel, with a particular desire to escape city life and embrace nature/outdoors and new discoveries.

The Lifestyle Leader segmentation shows that they are highly motivated by the following experiences, which are primary, secondary and/or emerging strengths across the region:

- Spectacular natural landscapes and experiences with nature.
- Walks and cycling.
- Arts, culture and events.
- High quality food.
- Wineries and cellar doors.
- Local produce and farmers markets.
- History and heritage.

<sup>8</sup> Tourism Research Australia, Tourism Forecasts August 2017



## 5. PRODUCT PROFILE

### 5.1. INTRODUCTION

This section provides an overview of the Murray Region's tourism product strengths and are categorised into primary, secondary and emerging.

**Primary strengths** refer to tourism strengths that are synonymous with the Murray brand and are considered to be the region's competitive advantage. Primary strengths include drawcard attractions, experiences and activities.

**Secondary strengths** refer to tourism product that has a smaller presence throughout the region but provides an important complementary offering for visitors.

**Emerging strengths** refer to tourism product that is limited in the region but has the opportunity to develop over time.

### 5.2. KEY FINDINGS

The appeal of the Murray Region as a tourism destination, and the primary product strengths of the region largely relate to the iconic Murray River, the third longest navigable river in the world. 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 history of Australia's longest river.

Building on work undertaken for the previous DMP in 2012, 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
- Private touring (self-drive)
- History/heritage
- 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.

Secondary tourism strengths are identified as Indigenous tourism, nature-based tourism and business events. Further development of key attractions and experiences in these sectors will further strengthen their appeal and have the potential to develop into primary strengths.

Arts and cultural tourism is identified as an emerging strength. Investment into arts and cultural attractions in recent years including the Albury Regional Art Gallery Upgrade (MAMA), Port of Echuca Revitalisation and the Echuca Art Gallery (Foundry Arts Space) has significantly bolstered the region's attraction as an arts and cultural destination.

### 5.3. TOURISM PRODUCT STRENGTHS

Table 9 summarises the Murray Region's tourism strengths, based on information provided by MRT and research undertaken by Urban Enterprise.

**TABLE 9** MURRAY REGION PRODUCT STRENGTHS

TOURISM SECTOR	MRT
Houseboats / River Cruise	Primary
Water Sports	Primary
Food, Wine and Produce	Primary
Fishing	Primary
Private Vehicle Touring (self-drive)	Primary
Golf	Primary
Festivals and Events	Primary
History and Heritage	Primary
Nature Based	Secondary
Business Events	Secondary
Arts and Culture	Emerging
Indigenous	Emerging
Adventure	Emerging

Source: Murray DMP 2012, Urban Enterprise 2018

#### 5.3.1. PRIMARY STRENGTHS

The Murray Region's primary strengths are identified as food and wine, fishing, private vehicle touring, motorised water sports, houseboats, golf, festivals and events, and history and heritage.

Fishing, water sports, houseboats, and history and heritage are largely centred around the Murray River; the region's most iconic natural asset, as well as the abundance of lakes and waterways across the region. These product strengths are present throughout all sub-regions and are synonymous with the Murray's destination brand.

The Murray is Australia's largest wine producing region and is home to some of Australia's largest wineries, but the visitor experience is limited. There are cellar doors dispersed throughout the region, some of which attract a significant number of visitors such as Trentham Estate, Mildura. However, the visitor offer across the region is underrepresented, particularly in the Western and Mid Western Murray.

There is an existing gap for tourism experience and infrastructure at many of the larger wineries (particularly in Western Murray). The focus of these estates is on wine production; they do not position themselves as tourism businesses.

Since the 2012 DMP, a number of new farm gate operators have established in the Mid-Eastern sub-region, which has strengthened the food product offering. Notable developments include Rich Glen Olive Estate in Cobram and Corowa Whisky and Chocolate.

The quality of restaurants and cafes in the region has improved since the preparation of the 2012 DMP. However, there remains a shortfall of signature restaurants in the region, with only Stefano's (Mildura) featuring in the Age Good Food Guide (AGFG 2017), Border Wine Room (Albury) retained its Chefs Hat for 2018 and Miss Amelie (Wodonga) was awarded a Chefs Hat in the recent announcement of the 2018 AGFG recipients.

Festivals and events are a key driver of visitation to the region. According to the Murray Events Strategy, the region hosts approximately 555 annual events. These events attract an estimated 833,211 attendees, with approximately 53% of attendees identified as non-locals. There are seven signature events identified in the Murray Region, and are as follows:

- Henty Machinery Field Days.
- Southern 80.
- Elmore Field Days.
- Deniliquin Ute Muster.
- Easter Powersports Festival.
- Riverboats Music Festival.
- Winter Blues Festival.

The Murray is Australia's number one golf destination. There are 67 golf courses across the Murray Region, catering to a variety of standards. While the quality of golf courses in the Murray Region is generally high, the facilities such as club rooms and accommodation are candidates for reinvestment and redevelopment.

Existing history and heritage attractions in the region include the Port of Echuca, Bonegilla Migrant Experience and Swan Hill's Pioneer Settlement. There are a number of historical/heritage themes that are underrepresented in the region, such as the Chaffey Trail in Mildura, Federation history in Corowa, and various museums in Greater Hume.

### 5.3.2. SECONDARY STRENGTHS

The secondary strengths in the Murray Region are identified as nature-based tourism and business events.

The Murray Region is home to a range of National and State Parks. The most iconic Parks in the region include the Barmah and Murray Valley National Parks, as well as the Hattah-Kulkyne National Park, Mungo National Park and the Murray Sunset National Park. Lake Tyrell has emerged in recent years as a popular destination with an influx of Chinese visitors. This recent tourism phenomena has been driven by both social media and word of mouth.

In addition to the network of state and national parks, there are significant number of nature-based experiences and activities that visitors can undertake including bushwalking, 4WD, canoeing and kayaking. The key gap for nature-based tourism is formalised tourism product and infrastructure within the Parks.

Arts and culture is recognised as a secondary strength in the Western Murray and Eastern Murray but is considered an emerging strength across the Central Murray, Mid-East and Mid-Western sub-regions.

### 5.3.3. EMERGING STRENGTHS

Significant investment has been made into arts and cultural attractions in recent years. Most notably in the Eastern and Central sub-regions; the Albury Regional Art Gallery Upgrade (MAMA), Cube Wodonga, Port of Echuca Revitalisation and the Echuca Art Gallery (Foundry Arts Space).

Indigenous product is considered a secondary strength in the Western Murray. There are some nodes where there are opportunities to further develop Indigenous product, particularly in the National and State Parks such as Lake Mungo, Millewa and Barmah.

Adventure tourism remains an opportunity across the region, but product and attractions remain largely undeveloped. Adventure tourism is considered to be an emerging strength in the Western and Mid-Eastern sub-regions, and opportunity exists to attract new markets (particularly millennials).



# PART B: DMP FRAMEWORK





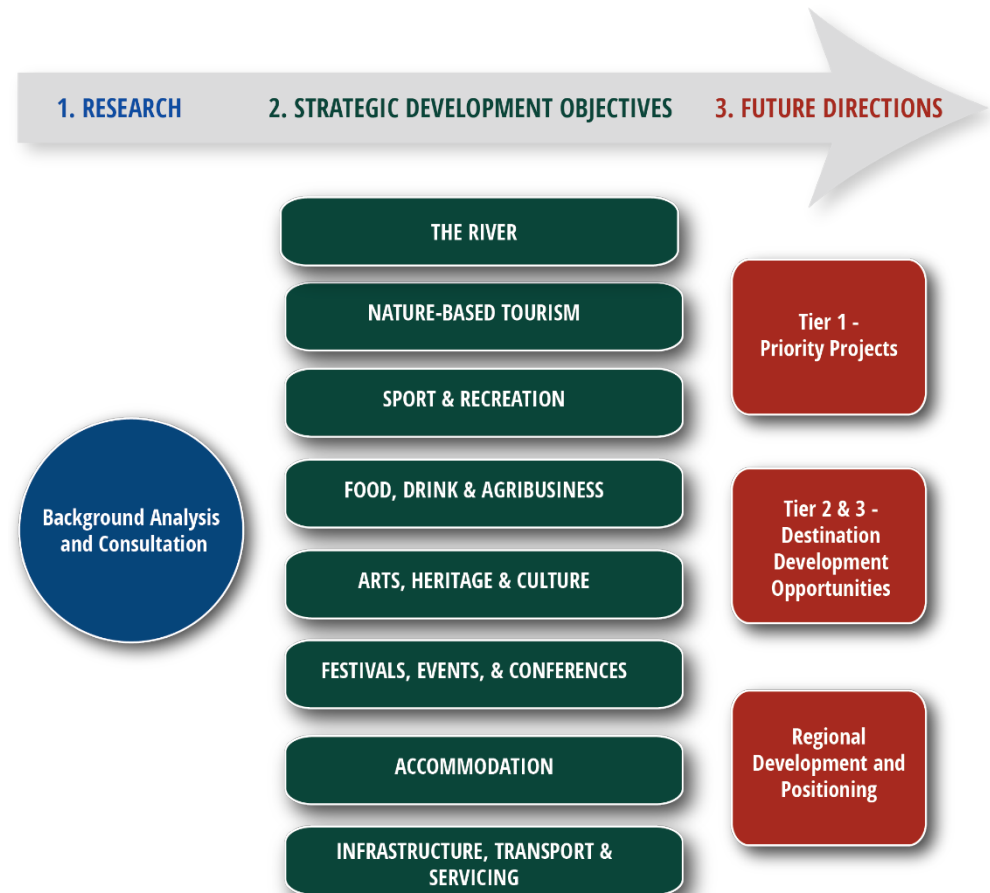
## 6. DMP FRAMEWORK

### 6.1. OVERVIEW

The following strategic framework has been prepared to address the gaps and opportunities for product development, infrastructure and servicing of visitors to the Murray Region.

This framework builds on the DMP Framework developed as part of the 2012 DMP and includes consideration of the following:

- Continued focus on the River as the key product of the Murray.
- Stronger focus on key nature based assets as a priority for the region.
- The role of sport and recreation as a driver of visitation to the region.
- The rise of beverage tourism including distilleries, cideries and craft breweries, in addition to the wine industry, as well as reinforcement of the importance of quality food and agritourism.
- Growth of arts and cultural related infrastructure in the region and the need to develop modern and contemporary interpretation of the region's heritage.
- Changes in consumer behaviour with visitors increasingly seeking more engaging, unique, and immersive tourism experiences.
- Continued investment and diversification in accommodation to meet projected demand and market expectations.
- Opportunities to capture a greater share of international visitation, particularly from key Asian growth markets.
- The need for ongoing investment in infrastructure including transport and visitor servicing infrastructure to keep pace with projected growth.



## 6.2. PROJECT ASSESSMENT

The projects identified in this plan have been ranked and prioritised using an agreed assessment methodology.

### 6.2.1. ASSESSMENT CRITERIA

A set of five assessment criteria were developed in order to prioritise projects. These include:

1. **Perceptions.** Positively influence the perception of the Murray 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.

An Assessment Criteria Matrix is shown in Table 10. The Matrix provides a summary of the rationale behind project rankings and weightings for each individual assessment criteria. The assessments were qualitative and subjective; based on local knowledge, stakeholder consultation, professional experience, and a general assessment of perceived benefits.

**TABLE 10** PROJECT ASSESSMENT MATRIX

RANKING	1. PERCEPTIONS	2. VISITATION	3. SUSTAINABLE	4: FURTHER DEVELOPMENT	5. DISPERSAL
5	Transforms the perception of the Murray in key external markets	A major drawcard to the Murray	High probability of successful implementation and continued operation	The project provides multiple opportunities for further development, of significant scale and/or importance to the region	Draw a significant amount of visitation outside of peak periods and/or to regions that do not currently have high levels of visitation
4					
3	Will create interest in the tourism market in key external markets	Will increase visitors and expenditure	Implementable, but has a degree of risk attached to its longevity	Some development opportunities arise due to the implementation of the project, which have a positive impact on the location	Some visitors will be in off-peak periods, or will be to less frequently visited destinations
2					
1	The project has an impact on the way the local community views the Region only	The project has minimal impact, if any, on the number of visitors	Minimal chance of being implemented	The project creates no further opportunities for development or investment	Minimal impact on visitation during off-peak seasons, and does not impact on the less frequently visited areas.



### **6.2.2. PROJECT PRIORITISATION**

Using the assessment criteria, the projects have been prioritised and ranked into the following tiers:

#### **GAME CHANGER PROJECTS**

15 game changer projects have been identified from the tier 1 projects. These are of a large scale, provide new assets to the region and will have a significant impact on overnight visitation.

#### **TIER 1 - PRIORITY PROJECT**

Large scale investment that will act as a catalyst for significant growth or unlock a major opportunity.

#### **TIER 2 - MAJOR PROJECT**

Investment that has strong potential and an impact at the sub-regional level. These projects will:

- Unlock an opportunity that could transform the product in a sub-region.
- Increase levels of visitation, length of stay and yield in a sub-region with a flow on increase in visitation that could impact a number of destinations.
- Improve awareness and perceptions of the sub-region.

#### **TIER 3 - POTENTIAL OPPORTUNITY**

Projects that are important to a specific destination or locality. These projects will:

- Fill a product gap and add to the critical mass of product in the region.
- May appeal to a smaller, niche market.
- Support tourism product and opportunities in a specific destination.
- Support an increase in visitation, length of stay and yield in a destination.
- Improve awareness of a locality or destination.

## 7. STRATEGIC DEVELOPMENT THEMES

### 7.1. THEME 1: THE RIVER

**OBJECTIVE 1** Promote and develop the river as the unique and essential element of the region's tourism offer, including passive, active and social uses of the river and its banks.

The Murray River is the longest river in Australia, third longest navigable river in the world, and is what makes the Murray Region unique. The river is the source of much of the region's nature based assets, heritage, food and wine industries and outdoor activities and is a recognised icon of Australia. From a tourism perspective, the river is what differentiates the region from other holiday destinations.

Primary market research undertaken as part of the 2012 DMP highlighted that 44% of people visited the Murray Region to experience the river itself.

Since preparation of the 2012 DMP many of the townships along the Murray River have invested greatly in their riverfronts providing an improved setting for visitors and the local community. Riverfront precincts that have been greatly improved include Mildura, Swan Hill, Echuca, Albury and Koondrook.

Further improvements are proposed to these riverfronts and a new wave of Murray townships are also seeking to reconnect with the River such as Deniliquin, Tocumwal, Corowa, Wentworth, Yarrawonga, Mulwala, and Wodonga.

Another recurring theme in the consultation process was the need to provide greater access to the river, either to walk along the banks, enjoy safe swimming zones, have a picnic or engage in boating and camping activities. There has also been widespread support during consultation for the development of a touring route along the river, which is a project currently being progressed by MRT (Murray River Road).

Of great importance for tourism in the region is maintaining a healthy river which is the lifeblood of many communities in Victoria, NSW and South Australia. The river is

also a critical source of water for food producers and the tourism industry. It is important that waterflows are managed to ensure the long-term health of the river and also that tourism is administered in a sustainable way.

#### All Seasons Mildura - Houseboats and Holiday Park

*"Our business has a strong commitment to the Murray River and the local tourism industry. We are continually investing in growing our business and employing locally, with our houseboat fleet expanding to 16 by the end of this year. We have also invested over \$1 million in our caravan park business over the past three years. We have great confidence in the future of the Murray tourism industry."*

Jodie Bromley, Owner, All Seasons Mildura, Houseboats and Holiday Park

#### 7.1.1. GAME CHANGER PROJECTS

##### RIVER CRUISING

###### Description

The Murray River, being the longest navigable waterway in Australia, provides opportunity for river cruising. This already happens on private vessels with many houseboats operating along the length of the River. There is potential to explore a commercial cruise option for the River which would provide a long multi-faceted journey through River Red Gum forests and the Murray's port towns. River cruising is one of the fastest growing tourism sectors worldwide and can facilitate visitor dispersal across the region.

There are some logistical issues that would need to be overcome with many weirs along the river's length preventing continuous passage for boats. A feasibility study has the potential to identify a range of opportunities for cruising on various craft right along the entire length of the river. This may include opportunities for trailable

houseboats between Albury and Mulwala and slightly larger craft from Mulwala to Barmah.

### Key Stakeholders

- MRT (Lead)
- Regional Development Victoria
- Department of Industry (NSW)
- Murray River LGAs
- Murray–Darling Basin Authority
- Goulburn-Murray Water (Victoria)
- State Water (NSW)
- Roads and Maritime (NSW)
- DRM

### Actions

- Establish a project control group led by MRT.
- Seek funding partners for a feasibility study and concept plan including a market assessment for the project.
- Develop prospectus material targeted to potential tour companies.

## GATEWAY ISLAND TOURISM DEVELOPMENT

### Description

Gateway Island and Lakes is a largely undeveloped site that sits between Albury and Wodonga. A tourism masterplan is currently underway for Gateway Island which will explore uses such as arts and culture, food, river, events, nature based activities and visitor accommodation. The large area has significant tourist potential and if delivered would form a major asset for the two cities.

### Stakeholders

- Wodonga City Council
- Albury City Council

- Regional Development Victoria

### Actions

- Complete Masterplan.
- Seek funding for staged delivery of public sector projects.
- Promote private sector investment opportunities.

## KERANG LAKES, KOONDROOK AND COHUNA WATERFRONT MASTERPLANS

### Description

There is an opportunity to greatly improve the tourism experience in Gannawarra's key tourism destinations through improved infrastructure, food and retail, and nature-based experience development. This includes three masterplans which have been funded by Gannawarra Shire and the Victorian Government:

### Stakeholders

- Gannawarra Shire
- Regional Development Victoria
- Parks Victoria

### Actions

- Complete Masterplan.
- Seek funding for staged delivery of public sector projects.
- Promote private sector investment opportunities.

## MILDURA RIVERFRONT (STAGE 2)

### Description

There has been significant investment into Mildura's riverfront in recent years, and Stage 2 of the Riverfront Masterplan will include release of public and privately owned land for community, commercial and residential developments, a tourism centre with visitor information services, café and cultural centre, transport interchange and landscaping developments.

Included in the riverfront development is the consideration of a conference centre and attached accommodation to attract business events and conferences to the region.

#### **Stakeholders**

- Mildura Rural City Council
- Regional Development Victoria

#### **Actions**

- Implement Stage 2 of the masterplan.
- Promote private sector investment opportunities.

### **7.1.2. OTHER TIER 1 PROJECTS**

#### **SWAN HILL RIVERFRONT MASTERPLAN STAGE 2**

A riverfront masterplan was completed by Swan Hill Rural City and provides a blueprint for future development. Further investment is required to realise this vision including trail development, visitor experiences, cultural centre and further food development.

#### **ALBURY RIVERSIDE PRECINCT**

Implementation of the Murray River Experience Masterplan and commercial activation of the riverside precinct, and improved connections to Gateway Island.

Establishment of a significant Riverside Precinct and major parks upgrade close to the Albury CBD. If successful, the funding application currently with the NSW State Government for the development of the Riverside Precinct will form a major part of Albury's tourism product development. Further masterplanning will be undertaken in the future to explore opportunities for commercial development nearby.

#### **YARRAWONGA FORESHORE IMPROVEMENTS**

Implementation of the masterplan for the Yarrawonga town centre and lake foreshore identifying improvement opportunities as a result of the Yarrawonga-Mulwala Bridge.

#### **TOCUMWAL FORESHORE DEVELOPMENT**

Implementation of the Tocumwal Foreshore Masterplan 2016 to include splash park and play space, riverwalk, amphitheatre, VIC, and town square. The project is shovel ready and awaiting a grant application for the 'dry side' of the masterplan which includes township-related projects. The 'wet side' includes fishing platforms, all abilities access, amphitheatre, and links to Murray River Adventure Trail.

#### **MULWALA FORESHORE DEVELOPMENT**

Implementation of the Mulwala Foreshore Masterplan which includes multiple sites along the Foreshore. The plan focuses on improving public access to the lake and providing opportunities to participate in passive and recreational activities. This will be achieved through the development of community infrastructure such as playspaces, boat ramps, a fishing jetty, amenities, BBQ facilities and car parking. Landscaping and improvements to park furniture will create welcoming spaces that will increase visitation and support growth.

#### **DENILIKUIN RIVERFRONT PRECINCT**

A masterplan is required to improve the riverfront experience in Deniliquin. The township currently has its 'back' to the river with no commercial food experiences overlooking the river and parkland. There are a number of commercial sites in Deniliquin that should be transitioned to make the most of riverfront locations.

#### **WENTWORTH RIVERFRONT DEVELOPMENT**

Long term planning for the future expansion of the Wentworth Riverfront precinct from the Wentworth Civic Centre to Willowbend Caravan Park focusing on linkages to existing facilities and concepts for future attractions. Currently at Concept Stage.

### 7.1.3. ALIGNED PROJECTS

Projects that are aligned to this theme should be supported. These include:

- Riverfront precinct enhancements and commercial activation (e.g. waterfront dining).
- Riverfront parkland enhancements.
- Boat ramps.
- Wharves and jetties.
- Water-based tour operators.
- Other water-based experiences.
- Interpretation of the Murray River.



## 7.2. THEME 2: NATURE-BASED TOURISM

**OBJECTIVE 1** Ensure that nature-based assets deliver high quality activities and experiences through improvements to infrastructure and the development of innovative tourism products.

The Murray Region includes a number of parks and reserves that provide an opportunity to further strengthen visitor products and experiences. Many of the National Parks were converted from state forests around five years ago however, while some infrastructure work has occurred, further investment is required. The provision of infrastructure and products within the nature-based assets would strengthen the experience, and attract market segments outside of the traditional visitors to the region.

Not only can the National Parks provide some extensive natural experiences, they are also home to significant Indigenous cultural sites. Although opportunities to highlight the Aboriginal heritage exist across the Murray Region, Lake Mungo in the Western Murray is the most prominent. The oldest human remains in Australia were found at the lake, and also the oldest evidence of ritual burial found anywhere in the world. Mungo is within the Willandra Lakes World Heritage Area, and is already recognised as an internationally significant destination. Improving the infrastructure and accessibility of the region will strengthen the appeal of the iconic attraction and further develop interest in the Indigenous history across the region.

There are many nature-based assets across the extent of the Murray Region. There is a need however to provide focus around some of the larger assets that can act as icons for the region and major drivers of visitation. MRT should advocate for focused investment in the following areas: Mungo National Park, Gunbower National Park and Barmah National Park, and Murray Valley National Park.

A key part of the delivery of projects aligned to this theme is continued engagement and collaboration with Parks Victoria and NSW Parks and Wildlife as key stakeholders. The draft River Red Gum Management Plan has recently been completed by Parks Victoria which includes a number of specific park improvements which should be supported.

### 7.2.1. GAME CHANGER PROJECTS

#### MURRAY RIVER ADVENTURE TRAIL

##### Description

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.

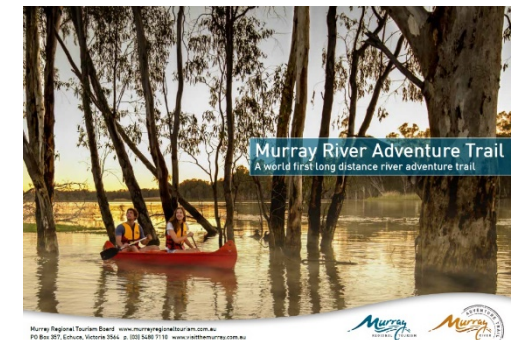
The trail extends from Lake Hume, near Albury Wodonga in the east to Mildura Wentworth in the West. The Trail traverses secluded River Red Gum forests and major settlements along the length of the Murray River and provides opportunities for visitors to experience the Murray River in its natural setting, allowing immersion in the environment through active recreation.

The land-based trail (for cyclists and walkers) is around 1,040 kilometres, while the water-based trail (for kayakers and other craft) is 1,390 kilometres. Trail users can enjoy sections or the entire length of the trail.

A detailed three-stage 10-year plan has been developed to deliver the trail. The establishment of a Murray River Adventure Trail Management Committee will be driven by MRT. The role of the group will be to advocate for funding to develop the trail and guide the project's strategic direction and implementation.

##### Stakeholders

- MRT (lead)
- DRM
- Local Government
- State Government Tourism and Parks Agencies (VIC and NSW)
- Murray Region nature-based and Indigenous tourism operators.



### Actions

- Establish the Murray River Adventure Trail Management Committee.
- Appoint a project manager to oversee delivery.
- Undertake a mapping exercise that tracks completion of project segments by each project partner.
- Seek and secure funding for detailed trail design and construction.
- Continue the staged delivery of the project as per the business case, seeking to prioritise elements with links to existing experiences and attractions.
- Establish 'Friends of the Murray River Adventure Trail' groups.
- Prepare a marketing strategy.

## BARMAH AND MURRAY VALLEY NATIONAL PARK TOURISM INVESTMENT MASTERPLAN

### Description

Barmah and Murray Valley National Park is one of the largest tourism assets in the region and stretches across NSW and Victoria.

Work with Parks Victoria and NSW Parks and Wildlife as well as regional funding partners to progress a tourism development plan for Barmah and Murray Valley National Park that identifies opportunities for nature-based and Indigenous tourism, private investment, and ongoing models to ensure maintenance of the park.

### Stakeholders

- MRT
- DRM
- Parks Victoria
- NSW Parks and Wildlife

### Actions

- Establish a working group with key stakeholders to plan for an iconic cross border National Park asset.

- Investigate the potential for coordinated naming of the corridor (e.g. Barmah National Park on both sides).
- Develop a strategic tourism infrastructure and visitor experience plan for the National Park.
- Amend management plans to reflect the infrastructure plan.

## GUNBOWER NATIONAL PARK TOURISM INVESTMENT MASTERPLAN

### Description

Gunbower National Park is a unique natural river redgum park that provides an old growth river red gum forest wrapping the Murray River. The Park is famous for its birdlife and with further investment and development could become an icon of the Murray Region.

A tourism investment masterplan should be considered for the Gunbower National Park to consider access, camping areas, trails, nature based activities, tour guides, Indigenous experience, interpretation, fit with the Murray River Adventure Trail and gateway townships. Ongoing models of funding for park maintenance need to be considered.

### Stakeholders

- MRT
- Parks Victoria
- Gannawarra Shire Council

### Actions

- Establish a working group with key stakeholders to plan for an iconic cross border National Park asset.
- Develop a strategic tourism infrastructure and visitor experience plan for the National Park.
- Amend management plans to reflect the infrastructure plan.

### 7.2.2. OTHER TIER 1 PRIORITY PROJECTS

#### WONGA WETLANDS RECREATION DEVELOPMENT

Wonga Wetlands is a former wastewater treatment area which through continued rehabilitation of the site, and investment in education and visitor facilities, now attracts between 20,000 and 25,000 visitors annually, and is an important local biodiversity hot spot with over 154 identified bird species.

The Wonga Wetlands Tourism Masterplan identifies a range of opportunities to develop the area as an eco-tourism destination including themed mountain bike course with an extensive all abilities trail network, skills development course, immersive wetland boardwalks, and visitor education centre.

#### GATEWAY TO THE OUTBACK POSITIONING

The region has the opportunity to position itself as a gateway to the Australian Outback, providing a more accessible and inexpensive experience to rival the Northern Territory such as Mungo National Park, Yanga National Park, Perry Sandhills. as well as the two largest rivers in Australia (Murray and Darling). Balranald and Mildura/Wentworth are well positioned to act as a gateway to the nature-based tourism opportunities of the region, particularly given the number of flights through Mildura Airport.

Through the development of more internationally ready tours and promotion of the nature-based experiences, and Indigenous storytelling, a greater share of capital city and international markets may be attracted to the region.

### 7.2.3. ALIGNED PROJECTS

Projects that are aligned to this theme should be supported. These include:

- Investment in parks infrastructure that supports nature-based tourism, such as roads, day visitor precincts, picnic areas, camping sites and toilets.
- Bird watching facilities and interpretation.
- Investment in trails including walking and cycling trails.
- Cultural heritage interpretation.
- Educational tours and operators.
- Eco and adventure tour operators.

## 7.3. THEME 3: SPORT AND RECREATION

**OBJECTIVE 2** Strengthen and increase the prominence of sport and recreation tourism in the Murray through facility renewal and attraction of new investment in infrastructure.

The Murray Region has a strong association with sport and recreation. There are many Australian sporting legends who have their roots in the region, highlighting the sporting pedigree in the Murray.

The sporting culture within the Murray Region has led to investment in major sporting infrastructure and event venues across the Murray's townships. This event infrastructure provides hosting opportunities for golf, tennis, bowling, football, basketball, soccer and swimming tournaments that bring visitors from across Australia to the region. The region's warm climate is a key advantage for hosting outdoor events.

Informal water-based recreation such as fishing, water skiing and boating is a major attractor to the region, with premium waterways and lakes providing assets for visitors.

The Murray is Australia's number one golfing destination with 67 golf courses catering to a variety of standards. Many of the golf courses are supported by substantial complementary facilities such as restaurants, bars, gaming and accommodation.

Some golf courses have invested substantially in improved off field facilities in order to provide a contemporary offer, however further investment is needed across many courses, to deliver facilities which compete with those in other regions such as the Mornington Peninsula, Bellarine Peninsula/Surf Coast and North East Tasmania.

### Golf on the Murray

*"The people who come to play golf on the Murray River enjoy the fact they are playing a leading Australian golf course in Victoria or New South Wales – they revel in the golf, the river and the experience. Tourism businesses taking a partnership approach is what's made the Murray the country's leading golfing holiday destination."* Amy Wright, Marketing Administrator, Golf on the Murray

### 7.3.1. GAME CHANGER

#### MILDURA MOTOR SPORTS PRECINCT (STAGE 1)

##### Description

Progression of the Mildura Motor Sports Precinct as outlined in the Business Case and Staged Development Plan. Capitalising on Mildura's robust motorsports sector, this project will see a major, multipurpose motorsports precinct established at Koorlong. Bringing together the region's key motor sports clubs and facilities, the 547 hectare precinct would include a sealed 3km road circuit (with potential for expansion), a skid pan, pits and control tower, office facilities, maintenance/wash-down shed, food/beverage facilities, parking and camping site. The concept will deliver one of Australia's leading motorsports precincts.

##### Stakeholders

- Mildura City Council
- Regional Development Victoria
- Confederation of Motor Sport
- Motorcycling Australia

##### Actions

- Seek private and public sector funding support.
- Actively advocate for investment in the precinct.

### 7.3.2. TIER 1 PRIORITY PROJECTS

#### ALBURY WODONGA SPORTS INFRASTRUCTURE INVESTMENT

Albury Wodonga is a growing destination for major sporting events. It is important that continued investment in sporting infrastructure is encouraged to maintain its growing status, and keep pace with population growth. Major projects include:

- A major redevelopment and expansion of Lavington Sports Ground including new playing fields and amenities. \$9 million in funding has already been secured for the precinct, and there is further opportunity for activation and redevelopment of the privately owned, former Lavington Sports Club site.
- Upgrade of the Lauren Jackson Sports Centre to include a five-court multipurpose venue with supporting facilities.
- A major regional aquatics facility in Albury Wodonga to service the needs of the local and surrounding communities, and visitors to the region. Further investigations are to be undertaken by Albury and Wodonga Councils as part of its Two Cities One Community partnership.
- Baranduda Fields sporting precinct will allow the City of Wodonga to showcase sport at a local, regional and state level, and will provide economic benefits from visitation of major sporting events. Planning is complete and awaiting funding.

#### MILDURA SOUTH REGIONAL SPORTING COMPLEX

Development of an indoor and outdoor sporting complex in one of Mildura's residential growth areas has long been a priority for the Mildura community. The proposed precinct would provide a home base for local sport and recreation clubs and bolster opportunities to host major sports, entertainment and conferencing events. Plans include a 3000-seat capacity entertainment centre, six-court indoor stadium, squash courts, change rooms, café and alfresco area, AFL-standard oval and second multipurpose sports field.

### 7.3.3. ALIGNED PROJECTS

Projects that are aligned to this theme should be supported. These include:

- Investment in supporting golfing infrastructure such as club houses, food and beverage and accommodation.
- Investment in sports and recreation facilities.
- Investment in sports clubs.
- Capacity building in event managers ability to host/run major competitions.



## 7.4. THEME 4: FOOD, DRINK AND AGRIBUSINESS

**OBJECTIVE 3** Improve the Murray's food and drink offer by encouraging primary producers to develop tourism infrastructure, promoting the use of local produce and the development of diverse and unique dining experiences.

Some of Australia's most productive agricultural land is located within the Murray Region, including broadacre farming, dairying, and significant areas of irrigated fruit production. Some of the largest vineyards are also located in the Western and Mid-Western Murray, along with many other wineries throughout most of the Murray Region.

Although there is no doubt that the region's food and wine production is agriculturally significant, there is limited opportunity for visitors to the Murray to engage with food experiences. Outside of the successful food based touring route in the Cobram area, there is limited farm gate operations or opportunities for visitors to have an agricultural experience. Wine is in a similar situation: many recognised wine labels run vineyards throughout the region but not cellar doors.

Since the previous DMP the region has improved its food and drink offer with new businesses having set up along the length of the Murray to deliver contemporary food experiences. There still remains dining opportunities at waterfront locations such as in Deniliquin, Corowa, Wentworth and Koondrook.

A major change since the last DMP in 2012 is the general rise of distilleries, cideries and craft breweries in Victoria and NSW. A new gin distillery has been established in Mildura and a whisky distillery in Corowa. There remains further opportunity for investment in craft beverage tourism.

### 7.4.1. GAME CHANGER PROJECTS

#### MURRAY AGRI AND CULINARY TOURISM EXPERIENCE PROGRAM

##### Description

The Murray is at the heart of Australia's largest food bowl, incorporating the Goulburn Valley, Murray and Riverina. Access to fresh local quality produce however is difficult in the region due to large commercial supply chains bypassing local food retailers.

The purpose of this program is to realise the Murray's potential as an agritourism and culinary tourism destination. MRT will undertake a specialised program that will focus on developing the region's product and experience offering to consumers by focusing on improving the quality, authenticity, and number of offerings available to visitors and locals.

##### Stakeholders

- MRT
- Agritourism businesses and primary producers
- Food, drink and dining retail businesses
- Murray River Local Governments
- NSW and Victorian Governments

##### Actions

- Implement the Murray Agri and Culinary Tourism Experience Development Program:
  - Farm to plate development strategy.
  - Food and agritourism experience development program pilots.
  - Product and experience development project roll out.
  - Establishing critical mass and a viable regional food system by consolidating growth and leveraging opportunities.

#### 7.4.2. TIER 1 PRIORITY PROJECTS

##### KOONDROOK BUTTER FACTORY ARTS PRECINCT AND MURRAY RIVER BREWERY

The development of a new brewery and distillery at the Koondrook Packing Shed. The investment would rejuvenate a heritage building, provide a significant new food destination for the region, align and compliment other major tourism investments in the local area, and strengthen Koondrook as a destination.

The co-located Butter Factory is also proposed to be developed into a diverse arts and business precinct with brewing, coffee roasting, chocolate, food and wine, and a range of artists in house.

Ganawarra Shire and RDV are currently working with investors to realise these opportunities.

##### COROWA DISTILLING EXPANSION PROJECT

Expansion of the popular attraction to include interactive whisky tours spanning 4 levels of distillery, courtyard expansion and beautification for alfresco dining (seating for 180), grounds beautification and street frontage improvement, penthouse level whisky tasting, lifestyle gift store, and photography studio and gallery.

#### 7.4.3. ALIGNED PROJECTS

Projects that are aligned to this theme should be supported. These include:

- Investment in craft beverage facilities:
  - Cideries
  - Breweries.
  - Distilleries.
- Winery cellar doors and tourism facilities (accommodation, function centre etc)
- Destination dining businesses.
- Quality food establishments focusing on local produce.
- Agritourism, farm gate, and taste trails.
- Capacity and workforce building in the hospitality sector.

## 7.5. THEME 5: ARTS, HERITAGE AND CULTURE

**OBJECTIVE 4** Provide unique Murray heritage experiences through improvement and modernisation of existing heritage icons and strengthening heritage interpretation linked to Indigenous, military history, river trade and transport, pioneers and irrigation.

The Murray River is home to many important Indigenous and European history and cultural sites, many of which are intrinsically linked to the river itself.

The Murray was the first major inland transport corridor in the country, and the paddlesteamers and port towns are a significant draw for visitors. The Port of Echuca Revitalisation project is a major initiative and consolidates the city as a history and heritage tourism destination. Pioneer Settlement is another long standing attraction in this segment, and is looking to renew its offer in conjunction with the redevelopment of the Swan Hill riverfront.

The Eastern and Mid Eastern Murray present a different offer, based more on other aspects of the country's history including immigration (Bonegilla), military history (Bandiana Army Museum), links to Federation (Corowa), aviation history (Lake Boga), and Greater Hume's museum trail. The development of the cultural precinct at Albury, including the Library Museum and a refurbished and extended art gallery and the entertainment centre will provide a hub for cultural experiences in the region.

### 7.5.1. GAMECHANGER

#### PORTS OF THE MURRAY

##### Description

First conceived in 2010, the Ports of the Murray River (POMR) Strategic Initiative was developed to encourage investment into new tourism product and experiences in the Murray's key historic ports and riverfronts. The strategy represented a series of projects in the Loddon Mallee region that had the ability to contribute to a change of perception and to reposition the Murray River in the Australian psyche.

The strategy quickly expanded to cover all of the riverside communities within the Murray Region – from Albury Wodonga in the east to Wentworth Mildura in the west. The project's geographic boundary has recently expanded to include the whole of the Murray River, linking with South Australia to grow the overall visitor experience.

##### Stakeholders

- MRT
- Local government representatives
- State government (Vic, NSW, SA)
- Federal government

##### Actions

- Continue to advocate for port and riverside investment in Murray River towns and communities.

### 7.5.2. TIER 1 PRIORITY PROJECTS

#### ECHUCA MOAMA ART BRIDGE

Development of a second river crossing, leveraging the surrounds for the development of an outdoor arts and recreation precinct. The Bridge Arts Project aims to provide a contemporary visual art-based record of the region's pre and post-colonial cultural development with a focus on the rich traditions of the Yorta Yorta Nation. The overall outdoor visual arts narrative will be complemented by an historical interpretive centre, contemporary gallery, educational/conference centre, walking tracks, sculpture space and a fauna park. An educational/conference centre will be added as a centre for international study groups. The bridge will also have a significant benefit to the town centres of Echuca and Moama, taking heavy vehicles from the centre of town.

#### SWAN HILL ART, INDIGENOUS AND CULTURAL PRECINCT

The redevelopment of the Swan Hill Regional Art Gallery has been investigated in the Murray River Interpretive Centre Feasibility Study 2017. This report highlights the potential opportunity to develop a multi-use facility, incorporating the Swan Hill Regional Information Centre, Swan Hill Regional Art Gallery and the new Interpretive Centre. This could incorporate a new multi-purpose facility within the Swan Hill Riverfront Precinct and activation of Pental Island. Supporting this will be the potential to develop new Indigenous tourism experience throughout the region including corroborees, interpretative walking trails, and public art displays / artefacts. As the Swan Hill region has one of the highest Indigenous population per capita in Australia, this project will enable access to the history of the Aboriginal people and their historic and contemporary art.

This investment would strengthen the draw of Swan Hill to key visitor markets, facilitate larger regional exhibitions, and complement the significant investments in Pioneer Settlement in recent years. The Feasibility study found that the centre would attract an additional 15,000 visitors to the region each year, increasing visitor spend by \$1.6 million and support an additional 28 jobs (direct and indirect).

#### PORT OF ECHUCA DEVELOPMENT

Further investment and delivery work is required in the Port of Echuca as per the previous masterplans and concepts plans developed. In particular implementation of the Port of Echuca Strategic Plan including new river boat dock, and improved esplanade area is required to strengthen the precinct and make it more visitor friendly.

#### BONEGILLA MIGRANT EXPERIENCE

Masterplan execution of Stage 2 upgrades including further restoration works, educational centre, chapel, and rail stop.

### 7.5.3. ALIGNED PROJECTS

Projects that are aligned to this theme should be supported. These include:

- Investment in heritage assets and improved interpretation.
- Investment and expansion of art and performance facilities.
- Repurposing heritage buildings and heritage sites for tourism use.
- Digital and contemporary interpretation of heritage.
- Cultural heritage interpretation.

## 7.6. THEME 6: FESTIVALS, EVENTS AND CONFERENCES

**OBJECTIVE 5** Promote an increase in year round visitation to the Murray through event facility investment and coordinated development and promotion of a series of events and conferences linked to Murray's tourism strengths.

Festivals and events are important in attracting new and diverse visitors to tourism regions, and encouraging visitors to travel in off-peak seasons to a wide range of destinations. Consultation with Local Government across the Murray Region indicated that currently there are events held most weekends, but there is a need for a coordinated series of high profile events that create widespread interest and visitation to the region.

There are some high profile events staged in the Murray Region that draw many people, such as the Southern 80 ski race, Henty and Elmore Field Days and the Deniliquin Ute Muster. The Southern 80 is estimated to have 90,000 people watch the race, while the Ute Muster holds world records for most utes and blue singlets in one place. Henty Field Days draw 55,000 visitors to the region over 3 days, and is a major event.

In addition to some of the traditional Murray Region events, a number of events in the region cater for the Lifestyle Leader market including the Winter Blues Festival in Echuca, Riverboats Music Festival, Sun Country Food and Wine Festival and Swan Hill Region Food and Wine Festival.

The Events Strategy by MRT provides a framework for event procurement and identifies event gaps and opportunities. The events strategy highlights the following gaps in events in the region that align to the product strengths of the Murray:

- Food and Wine events.
- Arts, cultural and heritage events.
- Agriculture events.
- Water-based and adventure events.

Sporting events are a key driver of visitation to the region with many of the larger regional centres and townships having a strong tradition in sporting competitions. These tournaments have a strong economic impact in the region with multi-night stays and attracting large numbers of participants and their families.

Business events is an important growing sector for some of the key townships in the region that have the facilities but also good access to key markets. The following locations are well suited for growing business events with good access and supporting infrastructure:

- Mildura/Wentworth – Excellent air access to Mildura from Melbourne, Sydney and Adelaide including Virgin flights.
- Echuca/Moama – Only 2 hours and 15 minutes from the Melbourne airport and strong supply of complementary facilities.
- Albury/Wodonga – Only one hour from Melbourne and Sydney by plane, direct flights from Brisbane, and 3 hours by car from Melbourne.

It is critical that investment in business event infrastructure is improved to capture this lucrative market.

### 7.6.1. GAME CHANGER PROJECTS

#### ALBURY ENTERTAINMENT CENTRE REDEVELOPMENT

##### Description

Expansion of the Albury Entertainment Centre Convention Wing to increase capacity and additional exhibition and break out spaces. This will allow Albury to attract larger events, and keep pace with a competitive regional conference market.

A feasibility study will be completed in 2018 examining future development options and appropriate size (in terms of delegate capacity). Further detailed design and concept work will be required once an appropriate option is confirmed.

##### Stakeholders

- Albury City Council

- NSW Trade and Investment
- Destination NSW
- MRT

#### **Actions**

- Complete Feasibility Study.
- Advocate for investment in the Entertainment Centre.

### **7.6.2. PRIORITY PROJECTS**

#### **ECHUCA VISITOR EVENTS PRECINCT PLAN**

Development of a Visitor Events Precinct in Echuca that capitalises on the opportunities in and around the areas which include Aquatic Reserve, Onion Patch, Foundry Arts and Culture Precinct. This precinct already accommodates a number of major events (e.g. Riverboats Music Festival). There is already a number of strategic documents that consider this precinct, and which need to be brought together: Aquatic Reserve Infrastructure & Service Plan, Echuca Arts and Culture Precinct Plan and Murray River Public Mooring.

### **7.6.3. ALIGNED PROJECTS**

Projects that are aligned to this theme should be supported. These include:

- Event and festival infrastructure.
- Business event venues.
- Marketing of business events in the region.
- Utilising existing assets for business events.
- Visitor accommodation targeting the business events market.
- New events and festivals, particularly in off-peak periods.



## 7.7. THEME 7: ACCOMMODATION

**OBJECTIVE 6** To diversify the accommodation base in the Murray Region to appeal to a range of target visitor segments.

The Murray Region has been host to a number of substantial accommodation investments since the preparation of the 2012 DMP. These include Quest Wodonga, Quest Mildura, Mantra Albury, Sebel at Yarrawonga (underway) and Albury Quest (Townsend). In addition, there has been significant reinvestment into existing accommodation facilities.

Accommodation gaps still remain in some areas and projected visitation growth requires continued investment in accommodation in the region.

Some gaps and opportunities in some accommodation types include:

- Quality self-contained hotel accommodation in Swan Hill.
- High end resort accommodation in Echuca Moama.
- The need to upgrade many of the 3 and 3<sup>1/2</sup> motels in the region.
- The lack of accommodation that provides river frontages, outside of caravan parks.

### Accommodation Operators in the Murray

*"Albury's location and its fantastic calendar of major events is drawing more and more tourism and business visitors to the region. Knowing there's a robust, coordinated and successful group of operators delivering fun holiday experiences means greater certainty for investments like the one Mantra Group will be making when its newest hotel opens in Albury this year."* Emma Jones, Regional Sales & Marketing Manager – NSW/ACT, Mantra Group

*"Being able to form worthwhile working partnerships with other tourism operators who rely on the Murray is great for our business and theirs - we're happy to support the events and activities along the Murray as it keeps visitors coming back every year."* Ainsley O'Bryon, Manager, BIG4 Riverside Swan Hill

*"Over the last eight years, RACV Cobram Resort has invested heavily on accommodation options and facilities to further improve its offerings for the wider market, including families. One goal of the resort is to increase visitation to the area over cooler winter months and this has been aided by the inclusion of a 25 meter indoor pool and spa. Historically, our main guest catchment region has been Melbourne and surrounds, however, recent efforts through advertising and caravan and camping shows have seen an increase in visitors arriving from within a closer radius for their holidays."* Gary Hunt, CEO, RACV Cobram

### 7.7.1. GAME CHANGER PROJECTS

#### ECHUCA MOAMA RESORT AND CONFERENCE CENTRE

##### Description

There remains a major gap in the Central Murray in terms of branded resort accommodation. The region has high appeal to a range of markets and a strong product mix. Most of the accommodation supply consists of tourist parks and motel style facilities. A large branded resort accommodation facility would have high appeal. Evidence from the Cobram RACV Resort shows that high quality resorts have strong potential in the Murray Region.

The facility should also include conferencing and event facilities to strengthen its mid-week appeal.

##### Stakeholders

- Campaspe Shire
- Murray Shire
- MRT
- Private Sector Investor
- Echuca Moama Tourism

##### Actions

- Continue to promote the opportunity through prospectus material.

#### SWAN HILL SERVICED APARTMENT HOTEL

The Swan Hill Commercial Development Strategy and Implementation Business Case provided evidence of a major gap in the provision of a serviced apartment hotel that meets the needs of the visitor and business market. There is limited high quality branded accommodation in the town that is not motel style accommodation and key opportunities relate to uses that can leverage from a riverfront location. Commercial investment will be sought for an accommodation venue that would also include conferencing and event facilities to strengthen its visitor appeal.

##### Stakeholders

- Swan Hill Rural City
- Private Investors
- MRT

##### Action

- Continue to advocate for investment in a facility on sites identified by Swan Hill Rural City as per the Riverfront Masterplan and Swan Hill Commercial Development Strategy.

### 7.7.2. OTHER TIER 1 PRIORITY PROJECTS

#### BARMAH ECO RESORT

There is opportunity for a large scale eco resort on the edge of Barmah National Park to provide for much needed visitor accommodation assets and infrastructure in proximity to the largest River Red Gum National Park in Australia. The eco resort will support increased visitation and provide the critical mass of visitors for sustainable tour and activity businesses.

#### WENTWORTH ECO RESORT DEVELOPMENT

The development of a large-scale riverfront eco resort in close proximity to Mildura and Wentworth. This is currently in the high-level concept stage but would fill an important gap and have a significant impact on the region.

#### SILVERWOODS YARRAWONGA STAGE 2

The \$35 million waterfront development includes a 117-room boutique hotel and serviced apartments, and first class amenities including bar and bistro, fine-dining restaurant, 300-person conference facility, pool, and gymnasium. Stage 2 is expected to be completed by 2019. It follows the first stage of the development including the delivery of an 18-hole championship golf course and pro shop.

### 7.7.3. ALIGNED PROJECTS

Projects which are aligned to this theme should be supported. These include:

- Reinvestment and repositioning motel accommodation to contemporary market need.
- Reinvestment in tourist parks to cater for family markets, e.g.: self-contained cabins, family facilities etc.
- Investment in interesting and innovative accommodation such as eco-tourism and wellness accommodation.
- Investment in large branded resorts and facilities.

## 7.8. THEME 8: INFRASTRUCTURE, TRANSPORT AND SERVICING

### OBJECTIVE 7 Ensure that the Murray provides critical infrastructure to maintain and strengthen accessibility for visitors to the region.

Infrastructure, transport and visitor servicing provides the framework for supporting visitation to the destinations. In the case of the Murray Region key areas for infrastructure investment needs include:

- New bridges crossing on the Murray River.
- Improved rail passenger services.
- Improved telecommunications infrastructure including visitor wi-fi and removal of blackspots.
- Airport investment and upgrades to meet future demand, and investigation of direct flights between Albury and Mildura.
- Consistent approach to physical visitor information provision.

It is important for MRT to advocate for investment in infrastructure projects that support tourism growth. Working relationships should be maintained between MRT and infrastructure delivery organisations in Victoria and NSW.

#### 7.8.1. GAME CHANGER PROJECTS

##### MURRAY RIVER ROAD

###### Description

The Murray River Road (MRR) encompasses an untapped travelling route alongside the mighty Murray River. It has the potential to significantly change the mindset of visitors, positioning the Murray River as an aspirational travel destination to be ticked off the bucket list. Visitors can eat, drink, camp, paddle, golf, drive or boat their way along the entire stretch of the Murray - beginning where the river rises in the Australian Alps and ending where it meets the ocean at Lake Alexandrina. The route can be conquered in one single adventure, or spread out into sections to navigate across the years.

MRT is seeking endorsement for the project concept and investment to advance the project. A partnership approach across the three states – Victoria, NSW, and South Australia – along with the affiliated riverside LGAs, would enable the launch of a comprehensive marketing campaign to fully realise the potential of the Murray River Road. A sustained long term marketing investment is needed to affect change in perceptions of the Murray and deliver significant positive outcomes for the region. The development of touring itineraries and encouraging complementary tourism investment to leverage the route will also need to be considered.

###### Key Stakeholders

- MRT
- Regional Development Victoria
- Department of Industry (NSW)
- Vic Roads
- Murray River Local Governments
- Roads and Maritime (NSW)
- State governments (VIC, NSW and SA)
- Federal government, specifically Tourism Australia and Regional Development Australia

###### Actions

- Seek funding partners including State Government, Local Government and Industry.
- Undertake a market assessment for the project including consideration of international markets.
- Identify the route and concept following completion of the market assessment.
- Develop an experience plan and matching itineraries.
- Develop a strategic business plan and marketing strategy for the route.

## MUNGO ALL WEATHER ROAD

### Description

Lake Mungo National Park cannot be accessed from either Mildura or Balranald following rainfall, impacting on tour operators and international visitors who have booked trips to the Willandra Lakes World Heritage Area. The road upgrade will also need to include the main routes through the area, as they are also not accessible following rain. As an internationally significant site, with a concurrent study into development of enhanced infrastructure by NPWS, this is an important project in lifting the profile of the Murray as a tourism destination.

### Stakeholders

- NSW Trade and Investment
- NSW Roads and Maritime
- NSW Parks and Wildlife
- MRT

### Actions

- Continue to lobby and advocate for investment in an All Weather Road to Mungo National Park from Mildura

## 7.8.2. OTHER TIER 1 PRIORITY PROJECTS

### DENILQUIN AIRPORT

Deniliquin airport is in the heart of the Riverina, Murray and Goulburn Valley regions and has the potential to become a major export airport of fresh food from Australia's largest agricultural footprint. The Toowoomba airport provides a model for this, with a mix of freight combined with passenger services.

The export of fresh agricultural product into Asia may allow the opportunity for commercial passenger flights into the mid Murray Region, including international arrivals and connection between existing airports in Albury and Mildura.

This project could be a potential gamechanger, allowing international transportation only 40 minutes from the Murray Region's largest holiday leisure tourist hub (Echuca Moama). A business case is currently being completed on the freight opportunities, and passenger flights are likely to remain a long-term opportunity.

### PASSENGER RAIL SERVICES TO MAJOR CENTRES

Passenger rail provides an important transport option for visitors seeking to explore regional Victoria and NSW who cannot or wish not to drive.

Albury Wodonga and Echuca Moama are both within 300kms of Melbourne and if higher quality and more frequent train services were provided, weekend escapes by train could be explored.

A recent review of train services between Melbourne and Albury Wodonga found they are inadequate to meet the needs of local residents, and that the north-east of Victoria has the poorest train services in the state<sup>9</sup>. The key areas that need addressing include:

- More reliable services.
- Faster journey times with fewer stops.
- More frequent services.
- Elimination of bus replacement service.
- Consistency of travel time.

The study estimated that service improvements could potentially deliver an additional 385,000 passengers per annum resulting in an additional \$113m in economic output and 487 jobs FTE.

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<sup>9</sup> Hume Corridor Passenger Rail Study, AEC, 2017

In addition, there is strong community support for rail services to be extended from Melbourne to Mildura and improved frequency of services to Swan Hill. This would have significant community benefit and provide another option for visitors to travel to the region.

### CONTEMPORARY VISITOR INFORMATION SERVICES

MRT recently embarked on a strategic assessment of visitor information services across the Murray Region to understand current and future demand for visitor information services. Delivery of the visitor information services study would provide focus of visitor information services where they are needed including quality digital visitor information services and marketing. New guidelines for accreditation should be considered in relation to future planning for the VIC network.

### ALBURY AIRPORT VISITOR UPGRADES

Continued development of the Albury Airport in accordance with the Masterplan. This will include improved regional branding, signage, activities kiosk, and visitor arrival information to showcase the regional offer.

### WODONGA CBD DEVELOPMENT

The staged redevelopment of the Wodonga CBD has significantly lifted the appeal for visitors with major retail services and a new food precinct in the former railyards. At full completion the project will double the size of Wodonga's central business district and bring new life to the city centre.

The next stages are being led by Development Victoria including opportunities for accommodation, entertainment complex, conference, and market facility development in planning stage. Development will support growth in business, events and visiting friends and relatives market.

### 7.8.3. ALIGNED PROJECTS

Projects that are aligned to this theme should be supported. These include:

- Bridges across the Murray River.
- Airport investment and upgrades to meet future demand.
- Road and highway investment such as lane widening, turning lanes, access roads etc. (e.g. Murray Valley Highway).
- Improved telecommunications infrastructure and addressing regional blackspots.
- Digital infrastructure including free Wi-Fi.
- Consistent signage.
- Township gateway improvement (Murray Valley Highway).
- Township streetscape improvements.
- Improved visitor information services.



## 8. MURRAY REGIONAL TOURISM PROJECTS

### 8.1. OVERVIEW

Since the preparation of the 2012 DMP, MRT has played a strong advocacy role in infrastructure investment, product development and has led the delivery of regional marketing and digital information delivery.

MRT will continue to play a key role in the delivery of region-wide projects and providing industry leadership.

The following provides an outline of key projects that will form the focus for MRT in attracting more visitors and yield to the region and in building capacity within the tourism industry. Implementation actions are outlined in blue.

### 8.2. PRODUCT DEVELOPMENT

#### MURRAY RIVER ROAD

The Murray River Road encompasses an untapped travelling route alongside the mighty Murray River. It has the potential to significantly change the mindset of visitors, positioning the Murray River as an aspirational travel destination to be ticked off the bucket list. Visitors can eat, drink, camp, paddle, golf, drive or boat their way along the entire stretch of the Murray, beginning where the river rises in the Australian Alps and ending where it meets the ocean at Lake Alexandrina. The route can be conquered in one single adventure, or spread out into sections to navigate across the years.

MRT will continue to be the lead organisation in delivery of this concept. It is critical that market assessment work be undertaken as a priority to determine the market potential of the concept and target markets including domestic and international market segments. This will assist in scoping the project concept further and also in developing targeted marketing collateral and activities.

- Seek funding partners including State Government, Local Government and Industry.
- Undertake a market assessment for the project including consideration of international markets.
- Identify the route and concept following completion of the market assessment.
- Develop an experience plan and matching itineraries.
- Develop a strategic business plan and marketing strategy for the route.

#### MURRAY RIVER ADVENTURE TRAIL

The Murray River Adventure Trail is a multi-sport adventure trail that 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.

MRT should continue to play a lead role in the trail's delivery. One of the gaps in delivery of the Murray River Adventure Trail is the lack of a single resource who can implement a coordinated delivery across the region. A dedicated staff resource within MRT should be considered for implementation of the trail.

Key actions for delivery of the Murray River Adventure Trail include:

- Establish the Murray River Adventure Trail Management Committee.
- Appoint a project manager to oversee delivery.
- Undertake a mapping exercise which tracks completion of project segments by each project partner.
- Seek and secure funding for detailed trail design and construction.
- Continue the staged delivery of the project as per the business case.
- Establish 'Friends of the Murray River Adventure Trail' groups.
- Prepare a marketing strategy.

## MURRAY AGRI AND CULINARY TOURISM EXPERIENCE

The purpose of this program is to realise the Murray's potential as an agritourism and culinary tourism destination and establish a critical mass of food and agritourism operators. MRT will undertake a specialised program that will focus on developing the region's product and experience offering to consumers by focusing on improving the quality, authenticity and number of offerings available to visitors and locals. A strategic plan is currently being developed. Actions identified include:

- **Implement the Murray Agri and Culinary Tourism Experience Development Program:**
  - **Farm to plate development strategy.**
  - **Food and agritourism experience development programs pilots.**
  - **Seek funding to roll out year 2 and 3 of the Farm to Plate Program.**

## RIVER CRUISING

There is potential to explore a commercial cruise option for the River that would provide a long multi-faceted journey through River Red Gum forests and the Murray's port towns. There are some logistical issues that would need to be overcome with many weirs along the river's length preventing continuous passage for boats.

Delivery actions include:

- **Establish a project control group led by MRT.**
- **Seek funding partners for a feasibility study and concept plan including a market assessment for the project.**
- **Develop prospectus material targeted to potential tour companies.**

## 8.3. INFRASTRUCTURE AND SERVICING

### CONTEMPORARY VISITOR INFORMATION SERVICES

The Murray Region is a large geographic tourism region stretching from Albury Wodonga to Mildura. The geographic size of the region and cross border nature

creates challenges in terms of governance and delivery of services, however MRT has shown leadership in the delivery of innovative projects that have become the benchmark for delivery in Victoria and NSW.

Delivery of efficient, targeted and effective visitor information services could prove to be one of the most difficult hurdles faced by MRT due to attachment to physical VICs by stakeholders and the lack of an effective governance structure to deliver an alternative approach. A recent review has provided an analysis of the current approach to physical information delivery across the region and has identified significant resources being dedicated to the existing approach including:

- Over \$1.8 million in net expenditure dedicated to delivery of accredited visitor information centres by Local Government and Regional/Local Tourism Organisations.
- Over \$300,000 in expenditure on collateral by Local Government and Regional/Local Tourism Organisations.

Many of the Local Governments in the Murray Region still operate largely independently in operating their VICs. This results in high cost for Visitor Information Centre delivery and a localised, rather than regional, focus for services.

The review of the Murray Digital Platform shows that when it is used effectively such as Albury Wodonga's destination website, usage is high. However, there are many destinations that are not using the digital platform and the approach to online visitor information delivery is inconsistent in quality and approach.

A regional approach to visitor servicing may be considered for the Murray Region. This will allow for a consistent and efficient approach to information delivery, collateral, experience and infrastructure across the region to better meet the needs of contemporary visitors.

Further consideration should also be made to consumer preferences and approaches to accessing digital information so that the MRT and Local Governments can respond to the way consumers search and access information. This includes consideration of all visitor touchpoints (physical and digital) to ensure a coordinated visitor information experience.

Visit Victoria is about to embark on a state-wide review of visitor services, and DNSW is also actively reviewing the current visitor information approach, the findings of which will need to be considered for the Murray Region.

#### **VISITING FRIENDS AND RELATIVES AWARENESS PROGRAM**

The VFR market is recognised as a key visitor market and represents 35% of all overnight domestic visitors to the Murray. Research by DNSW has highlighted the important role that VFR hosts play influencing trip activities and itinerary recommendations. It is vital that hosts are equipped with necessary information to positively influence travel to the region and acts as ambassadors.

- **Develop a VFR Program to encourage residents in the region to act as ambassadors in the region.**

#### **CONTEMPORARY MARKETING STRATEGIES**

Although marketing for the region has improved in recent years, there is still a gap in the development of contemporary and aspirational marketing content and strategy. This is particularly important for generating interest from new markets who are seeking more authentic and immersive travel experiences (e.g. Lifestyle Leaders, Experience Seekers). This would include developing a stronger sense of the Murray brand character, its position in the market place, and signature experiences that can be used to generate interest. Improved digital and social media marketing strategies also need to be considered, as well as the development of quality imagery and video content.

- **MRT should seek funding partners to assist with support of a digital review for the region.**
- **Undertake a branding framework for the Murray Region.**
- **Utilise the branding framework to develop aspirational marketing strategies and campaigns.**

## **8.4. INDUSTRY DEVELOPMENT / STRATEGIC PLANNING**

### **EVENTS STRATEGY DELIVERY**

Events and festivals form a major part of the Murray Region's visitor economy driving significant visitation, particularly off-peak visitors. The Murray Region Events Strategy identified a range of initiatives to allow for a consistent approach to procurement and monitoring of events in the region.

Key actions for delivery of the events strategy include:

- **Work with both DNSW and Visit Victoria to develop a consistent event evaluation model for monitoring the performance of events.**
- **Work with LGAs to promote standardised event procurement in the region.**
- **Attract events to fill identified gaps in the Murray event calendar, particularly during off-peak periods.**

### **INDIGENOUS TOURISM CAPACITY BUILDING**

Indigenous Tourism is an emerging product in the region and there is a growing interest in cultivating Aboriginal cultural tourism. While the current offering is recognised as being underdeveloped for the international market, the potential for future growth is highlighted.

The Hume Aboriginal Cultural Trail 2017 study identifies the vision that "By 2027 Hume will enjoy a thriving Aboriginal cultural tourism economy rich with memorable experiences that connect visitors to Hume's Aboriginal cultures". The study sees best practice as identifying and embracing compelling experiences, building capacity and, most importantly, encouraging partnerships including business-to-business opportunities within the broader tourism sector.

- **Work with regional partners to implement the findings of the Hume Aboriginal Cultural Trail, including the following integrated initiatives:**
  - **A skills audit to ascertain the level of skill that exists in the community and to establish the areas of greatest need for education and training associated with the tourism sector.**

- **A skills development program to address identified gaps.**
- **An entrepreneurship and enterprise incubation program to be undertaken with the private sector, building on existing programs.**

## **COMMERCIAL TOUR OPERATORS ATTRACTION**

There is currently a shortage of commercial tour operators in the region, particularly international-ready products. Smaller scale tourism operations such as canoe, boat and bike hire are also limited.

There are a number of barriers that currently limit tour operations such as insurance (particularly for water activities), compliance, and finance. Programs to assist new commercial tour operator entrants should be considered, as well as technology innovations that are facilitating small tourism enterprises. Airbnb has recently launched 'Airbnb Experiences' that connects visitors with local guides and independent tour operators. It is currently only available in major capital cities but is expected to expand nation-wide in the future. This may facilitate the development of new and immersive experiences in the region targeted to millennials and younger travellers.

- **A commercial tour attraction strategy should be considered that identifies barriers to entry, grant programs that could be leveraged, and government support programs.**

## **ONGOING TRACKING OF INDUSTRY AND VISITOR MARKETS AND ECONOMY**

A set of measures should be agreed upon to track the success of the DMP. This may include the following:

- Investment by the private sector – to be collected through Local Government.
- Perceptions and awareness of the Murray Region in key markets via an ongoing tracking study undertaken every two years.
- Visitation – the number of visitors using NVS data including daytrip visitors, overnight visitors, and visitor nights.

- Visitor economy data to be collected annually including expenditure, output, and jobs attributed to tourism.

Visitor activity data to be compiled against DMP themes on an annual basis.

- **MRT to agree on tracking measures of the DMP to be undertaken annually.**

## **INDUSTRY AND WORKFORCE DEVELOPMENT**

MRT should continue to play a role in educating industry on tourism trends and identify partnership opportunities for industry to buy into. In addition, MRT should keep track of issues facing industry including barriers to investment and attraction and retention of tourism workers.

- **MRT to deliver regular forums across the sub-regions of the Murray for industry.**
- **MRT to monitor workforce and industry trends through annual industry surveys.**

## **CROSS BORDER GOVERNANCE**

MRT is the only cross-border regional tourism body in Victoria and NSW. Importantly, visitors do not recognise administrative borders, and strategic planning needs to consider how both sides of the river function together as a tourism destination. Currently, the cross-border status of the region can be an advantage (as funding can be sourced from both State Governments) but is often a disadvantage in the co-ordination of service and infrastructure delivery, fragmentation of government, duplication of resources, and varying approaches to regulation and red tape. Some of the specific issues include the following:

- The different ownership and legislation governing land use along both sides of the Murray is seen as a major barrier in riverfront development. The border is on the Victorian side of the river and includes the river bank, which increases the difficulty of projects along the southern side.
- Much of the Victorian side of the river is Crown Land, which also limits opportunities for development. The NSW side of the river is predominantly in

private ownership, making development largely dependant on owner's intentions.

- In both jurisdictions, there are other restrictions related to environmental and water management. Cross-border issues also impact on the location of boat moorings and licensing for tour operators and fishing.

NSW established a Cross-border Commissioner in 2012 to help resolve issues around better coordinating service delivery, infrastructure and planning processes to meet the needs of border communities. The Victorian Government is currently undertaking a business case to establish a Cross-border Commissioner's Office for Victoria. If given the green light, the Commissioner will be charged with promoting the interests of Victorian border communities, resolving issues, and developing common approaches with neighbouring states.

- **Advocate for the establishment of a Victorian Cross Border Commissioner.**
- **Develop a priority list of cross-border issues impacting tourism in the region.**

## **REGIONAL TOURISM GOVERNANCE**

Destination NSW has recently undertaken a review of tourism structures resulting in the establishment six new Destination Networks. This includes Destination Riverina Murray (DRM) which covers a wide area across southern NSW, including the Murray River Councils on the NSW side, overlapping with the MRT region.

MRT will continue to take the lead as the peak cross border entity for strategic planning in the Murray Region. It is important that the two bodies work collaboratively to avoid resourcing overlap and develop a united and stronger advocacy voice for the region.

In addition, MRT will continue to work with other neighbouring regional tourism bodies to partner on mutually beneficial initiatives.



# PART C: SUB REGION PROFILES





## 9. EASTERN MURRAY

### 9.1. DESTINATION SUMMARY

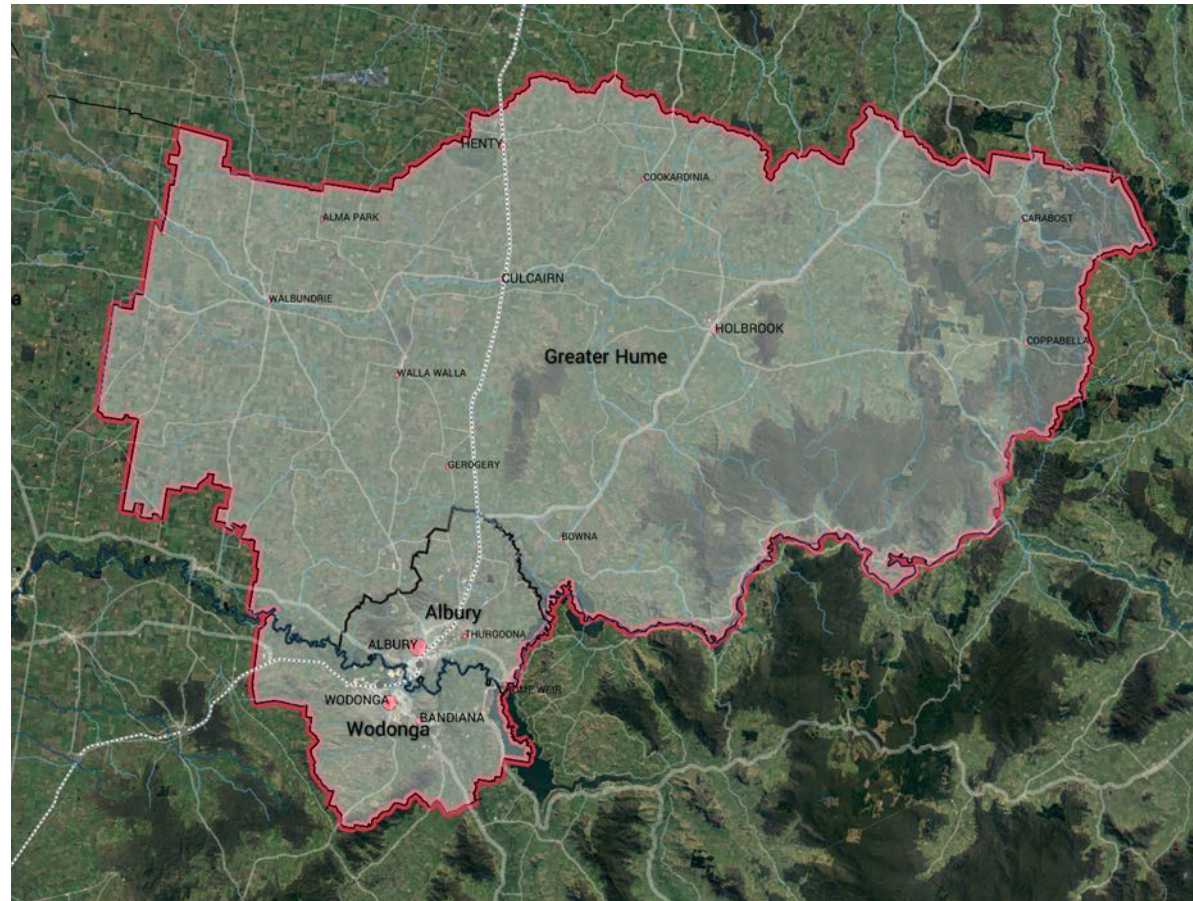
The Eastern Murray includes the Councils of Albury, Wodonga, and Greater Hume.

Albury and Wodonga share an important cross-border relationship, and together make up the largest regional centre in the Murray Region, and fifth largest inland city in Australia. It is located on the Hume Highway, a strategically important Melbourne-Sydney corridor, and in close proximity to Canberra. There is significant opportunity to develop compelling tourism product that draws visitors for an extended stay or overnight stop.

Greater Hume Shire is comprised of a series of towns and smaller villages, with the largest settlements including Culcairn, Henty, Holbrook, Jindera, and Walla Walla. The major experiences are related to the town's settler history and many museums. The Shire's proximity to Albury Wodonga, and Wagga Wagga to the north, have a major influence on the Shire's employment and economy.

The region is strategically located in proximity to a number of other popular tourism destinations (e.g. Snowy Mountains, Victorian High Country, Rutherglen Wine Region). Albury Regional Airport provides airline services to a number of major capital cities.

FIGURE 15 GREATER ALBURY SUB-REGION



Source: Urban Enterprise

## 9.2. PRODUCT STRENGTHS

Eastern Murray has a number of regional product strengths as shown in Table 11.

### SURROUNDING REGION AND DAYTRIPS

An important feature of Eastern Murray is its proximity to a number of major destinations that are within a short drive and can be explored as a daytrip. These include:

- The Victorian High Country with its picturesque towns (e.g. Beechworth and Bright) wineries and breweries.
- Ski resorts including Falls Creek, which is 1.5 hours drive.
- The Snowy Mountains region with its unique lakes and landscape.
- Other picturesque destinations and towns along the Murray (e.g. Corowa, Howlong).
- The Rutherglen wine region.

Albury Wodonga can leverage its proximity to these destinations to position itself as a base for exploring the region, and extending the length of stay.

**TABLE 11** EASTERN MURRAY PRODUCT STRENGTHS

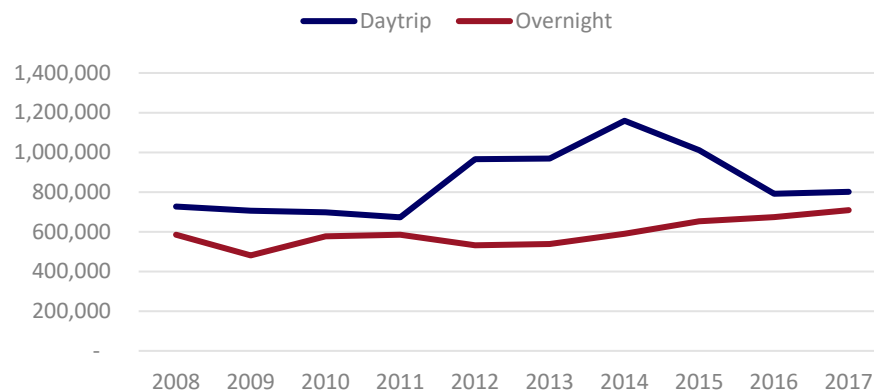
THEME	STRENGTHS	SUMMARY
<b>Rivers and Waterways</b>	Primary	The Murray River is a major feature of the region, and there has been significant investment on the Albury side of the river in recent years. Lake Hume is also a key leisure destination in the region. Gateway Island and Lakes remains a significant tourism opportunity.
<b>Events and Festivals</b>	Primary	Albury Wodonga's large accommodation base and event facilities allow the cities to host major events. Sporting events in particular are a major strength and Henty Field Days is one of the largest events in the region in terms of visitation.
<b>Arts and Culture</b>	Primary	Albury Wodonga has developed as an arts and culture destination in recent years, following a number of significant investments, the largest being MAMA (Murray Art Museum Albury) and Bonegilla Migrant Experience (Stage 1).
<b>Business and Conferencing</b>	Primary	Albury Wodonga plays an important economic role in the region as the major business and employment base including agribusiness, manufacturing, transport, and professional services.
<b>History and Heritage</b>	Secondary	History and heritage is a major feature of the sub-region, with opportunities to explore the pioneer, immigrant, and Indigenous stories of the region. Major attractions include Bonegilla and Greater Hume's museums trail.
<b>Nature and Parks</b>	Secondary	Eastern Murray includes a number of parks, gardens and waterways which are utilised for outdoor tourist experiences. More can be done to develop nature-based experiences to complement the rest of the tourism offering. Opportunities to activate the hills surrounding Albury Wodonga should be explored. Woomargama National Park is also underutilised.
<b>Dining and Local Produce</b>	Secondary	There has been a significant improvement in the quality and breadth of the food offering. Junction Place in Wodonga in particular has added a number of new food operators.

### 9.3. VISITOR PROFILE

#### SUMMARY OF VISITATION TO EASTERN MURRAY (2017)



FIGURE 16 EASTERN MURRAY VISITATION 2008-2017



Source: TRA NVS & IVS Visitation 2007-2017 YE June

<sup>10</sup> A visitor must stay a minimum 4 hours in a destination to be considered as a daytrip in the National Visitor Survey (TRA)

The Eastern Murray receives over 1.5 million visitors per annum. There has been a significant increase in overnight visitors with an additional 120,000 since 2008, coinciding with the development of a number of major accommodation establishments in recent years (e.g. Wodonga Quest, Albury Quest).

In addition, the region receives a significant number of stopover visitors on the Hume Highway corridor who are largely not captured in visitation data.<sup>10</sup> Traffic data shows that the Hume Highway just north of Albury receives an average of 12,000 vehicles per day (4.4 million per annum).<sup>11</sup>

#### POPULATION

In addition to the visitor market, Albury Wodonga is a major population base with over 91,000 residents, which is expected to grow to over 125,000 by 2036.<sup>12</sup> This provides an important market for local businesses, will grow the VFR market, and assists in underpinning the viability of a range of tourism related investments.

Albury Wodonga is currently experiencing an increase in young families moving to the region drawn by new growth areas, affordable housing, employment opportunities, and lifestyle. Analysis of population projections shows an expected increase in the number of residents aged under 17 years. This will grow demand for family friendly attractions and activities.

<sup>11</sup> NSW Transport, Roads and Maritime Services, Traffic Volume Viewer 2017 ('Table Top' counter)

<sup>12</sup> Forecast ID Albury, Forecast ID Wodonga

## 9.4. PROJECT LIST

**TABLE 12** EASTERN MURRAY PROJECTS

TIER	LGA	LOCATION	TITLE	THEME	DESCRIPTION
1	Albury	Albury	Albury Entertainment Centre Expansion and Convention Facilities	Festivals, Events and Conferences	Investigations into the capacity for expansion of the Albury Entertainment Centre Convention Wing are underway to determine if capacity can be increased to 600+ and additional exhibition/break out spaces created.
1	Albury	Albury	Albury Airport Improvements and Visitor Welcome Facilities	Infrastructure, Transport and Servicing	Development of the airport in accordance with Masterplan. Improve regional branding: welcome/farewell signage as well as improved signage to airport. Digital activities kiosk at airport showcasing the regional offer.
1	Albury	Albury Riverside	Albury Riverside Precinct	Nature-based	Establishment of a significant Riverside Precinct and major parks upgrade close to the Albury CBD and key element of the Murray River Experience.
1	Albury	Wonga Wetlands	Wonga Wetlands Recreation Development	Nature-based	Staged investment of Wonga Wetlands based on the product development masterplan. This includes themed mountain bike course with an extensive all abilities trail network, a skills development course, immersive wetland boardwalks, and a visitor centre.
1	Albury	Albury	Murray River Experience Masterplan	Nature-based	A review of the Murray River Experience Masterplan (originally created in 2006). Many aspects of the plan have been implemented and funding has been sought for the remainder of other elements. Given the recent Two Cities One Community partnership between Albury City and City of Wodonga, the Murray River Experience should be reviewed to explore opportunities to cross over into Victoria.
1	Albury / Wodonga	Various	Hume Passenger Rail Corridor	Infrastructure	Improve service frequency, journey time and reliability.
1	Albury / Wodonga	Albury Wodonga	Albury Wodonga Sports Infrastructure Investment	Sports and Recreation	It is important that continued investment in sporting infrastructure is encouraged to maintain its growing status, and keep pace with population growth. Major projects include Lavington Sports Ground, Lauren Jackson Centre, and Albury Wodonga Aquatic Complex, Baranduda Fields.
1	Wodonga	Wodonga CBD	Wodonga CBD Development	Accommodation / Festivals, Events and Conferences	Redevelopment of the CBD currently being led by Development Victoria including opportunities for accommodation, entertainment complex, conference, and market facility development in planning stage. Development will support growth in business, events and visiting friends and relatives market.
1	Wodonga	Bonegilla	Bonegilla Migrant Experience Stage 2	Arts, Heritage, and Culture	Masterplan execution of Stage 2 upgrades including further restoration works, educational centre, chapel, and rail stop.
1	Wodonga	Gateway Island	Gateway Island Tourism Precinct	Nature-based	Development of Gateway Island for tourism experiences. A masterplan is currently underway to identify future opportunities including new attractions, upgraded trail network, and events infrastructure. Opportunity to establish linkages with Murray River Experience projects.

2	Albury	Albury	Central Backpackers	Accommodation	New backpacker accommodation within walking distance of the CBD to fill an existing gap
2	Albury	Albury/Wodonga	Indigenous History Tours	Arts, Heritage and Culture	River, tracks and trails tour of the Indigenous history of Albury Wodonga
2	Albury	Albury	Turks Head Building Commercial Activation	Arts, Heritage and Culture	The commercial activation of the historical Turks Head building. This will be made viable by completion of the car parking and upgrades in and around Oddies creek and Australia Park, which are included in the Murray River Experience Masterplan.
2	Albury	Albury	Albury Wodonga Equestrian Centre Upgrade	Festivals, Events and Conferences	A review of the masterplan for the Albury Wodonga Equestrian Centre is soon to commence with a view to incorporating a major indoor arena.
2	Albury	Albury / Wodonga	Albury-Wodonga Major Cultural Festival	Festivals, Events and Conferences	A major cultural festival for Albury Wodonga is currently planned for 2018/19.
2	Albury	Albury	Albury- Wodonga RV Strategy	Infrastructure, Transport and Servicing	Planned future strategy for the development of RV facilities.
2	Albury	Albury	Albury Hills Strategy	Nature-based	Strategy to improve the activation and utilisation of Albury's hills e.g. cycling, MTB, hiking.
2	Albury	Lake Hume	Lake Hume Houseboats	Rivers and Waterways	There has been a push for houseboats on Lake Hume. However, currently there are policy and regulation barriers.
2	Albury / Wodonga	Albury	Major Family Attraction	Attractions	Consider development of a major family attraction to service growing visitation and growing young family population in Albury Wodonga. This can leverage from the significant volume of traffic on the Sydney-Melbourne corridor.
2	Albury / Wodonga	Albury & Wodonga CBD	Albury Wodonga Night Time Economy	Infrastructure, Transport and Servicing	Laneway activation to assist in night-time economy development and creation of precincts within the CBD.
2	Albury / Wodonga	Albury/Wodonga	Albury-Wodonga Public Transport	Infrastructure, Transport and Servicing	Albury Wodonga's internal public transport needs improvement, particularly on weekends. There should also be better connectivity between Albury Wodonga and the surrounding townships for potential day trip outings.
2	Albury / Wodonga	Wonga Wetlands	Wagirra Trail Extension	Nature-based	Investigate further extension of Wagirra Trail to link Wonga Wetlands, Lake Hume, Bonegilla and High Country Rail Trail. This could also include elements identified in the Murray River Adventure Trail.
2	Albury / Wodonga	Albury/Wodonga	Caravan Park/ Camping Ground/ Eco-accommodation	Nature-based/ Accommodation	Consider development of Caravan Park/Camping Ground/Eco-accommodation with river setting, a key gap in region. Potential areas include Gateway Island and Wonga Wetlands, or other private landholdings.
2	Greater Hume	Various Towns	Greater Hume Museum Trail and Reinvestment	Arts, Heritage and Culture	Greater Hume has 11 museums across the Shire, all with a differing offering. There is a strategic plan currently underway to identify priority reinvestment. There is also opportunity to link the museums and heritage towns with a touring route.



2	Greater Hume	Wirraminna	Wirraminna Environmental Education Centre	Nature-based	The Wirraminna Environmental Education Centre is located in Burrumbuttock, North of Albury. The Centre provides opportunities for school groups, clubs and organisations as well as individual visitors to learn about the environment and ecology of the woodlands and native plants. A study undertaken in 2011 identified the need to improve the gateway and update the interpretation provided at the Centre: this is estimated to cost \$62,000.
2	Greater Hume	Doodle Cooma Swamp	Doodle Cooma Swamp Visitor Infrastructure	Nature-based	Doodle Cooma Swamp, located near Henty, could benefit from improvements to its visitor nodes, including picnic grounds, canoe launching points, toilets, signage and camping. Site planning and implementation is expected to cost in the vicinity of \$400,000.
2	Greater Hume	Woomargama National Park	Woomargama National Park Development	Nature-based	Woomargama National Park is to the south of Holbrook, and runs south to almost meet the banks of the Murray. The park includes the Hume and Hovell Track and a bird watching trail. The management plan for the park includes conservation and interpretation of key Indigenous and mining heritage items, as well as the provision of improved visitor information and camping infrastructure.
2	Greater Hume	Hume and Hovell Track	Hume and Hovell Track Improvement	Nature-based	Improvements to the Hume and Hovell Track including new interpretive signage, bridges and crossings.
2	Wodonga	Wodonga	Group Accommodation	Accommodation	Development of a group accommodation facility to support school and sporting groups.
2	Wodonga	Wodonga CBD	Wodonga CBD Accommodation	Accommodation	Development of high quality accommodation in the Wodonga CBD leveraging recent improvements.
2	Wodonga	Wodonga	Wodonga Library and Gallery Redevelopment	Arts and Culture	Gallery and library redevelopment, in feasibility and concept planning phase. Detailed design phase to commence in 2018/19.
2	Wodonga	Hothouse Theatre	Hothouse Theatre Improvements	Arts, Heritage and Culture	Undertake a study to identify future improvements and opportunities to grow the role of the theatre in Wodonga's arts and cultural offering.
2	Wodonga	Wodonga Hilltops	Wodonga Hilltops Tourism Opportunities	Nature-based	Wodonga Hilltops consultation and strategy complete. Advisory committee forming to determine phases. The Strategy identifies a number of new tracks and trails.
2	Wodonga	Wodonga	High Country Rail Trail Improvements	Nature-based	Improved standard and connectivity for rail trail. Planning complete, execution subject to funding.
3	Albury	Albury	Albury Creative and Arts Infrastructure	Arts, Heritage and Culture	There remains a major funding shortfall for arts and culture infrastructure in Albury, with major initiatives recommended under the Creative Economy Strategy, specifically the QEII Cultural precinct and the Makers Space projects
3	Albury	Unknown	Uiver Collection Museum	Arts, Heritage, and Culture	Undertake a feasibility study to establish a museum to house the 'Uiver', a DC2 airliner which made an emergency landing in Albury in 1934 during the London to Melbourne air race.
3	Albury	Albury	Willowbank Events Space	Festivals, Events and Conferences	Event space at Willowbank on the banks of the Murray River for music events.



3	Albury / Wodonga	Various	Sports Events Capacity Audit	Sport and Recreation	Undertake an audit of sports infrastructure across the two cities to determine capacity and opportunities to improve facilities in order to accommodate larger sporting events.
3	Greater Hume	Morgans Lookout, near Walla Walla	Morgans Lookout	Nature-based	Morgan's Lookout near Walla Walla is a rocky outcrop with 360 views of the countryside. Investigate options for improvement.

## 10. MID EASTERN MURRAY

### 10.1. DESTINATION SUMMARY

The Mid Eastern Murray sub-region includes the Councils of Moira (Victoria), Berrigan (NSW) and Federation (NSW).

Yarrawonga Mulwala on the shores of Lake Mulwala is popular for water-based recreation, golf, nature-based activities and its clubs.

Cobram Barooga forms a tourism cluster in the highly productive agricultural region and is popular for Murray River based recreation, golf and club resorts.

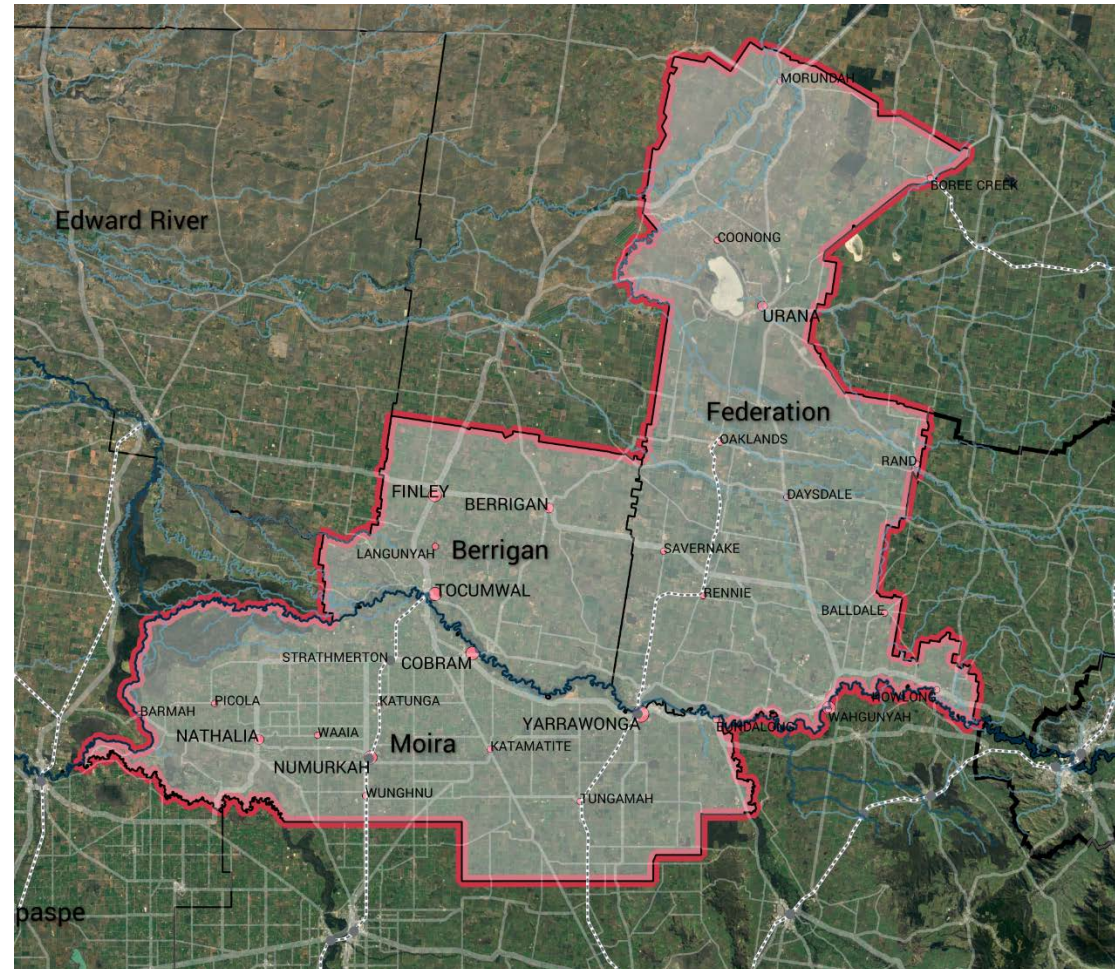
There has been some growth in agritourism surrounding Cobram Barooga and Yarrawonga Mulwala, which strengthens the sub-region as a year round destination.

Corowa and Howlong within Federation Shire have strong links with Rutherglen Wine Region, which is just over the border in Victoria. These destinations draw in visitors for their high-quality golf courses and river-based tourism.

Within Berrigan Shire, Tocumwal, Finley and Berrigan have popular golfing assets while Tocumwal is one of the region's finest heritage river villages.

Barmah Forest provides a key nature-based asset within the Murray Region and presents opportunity for further enhancement as a leading icon of the Murray.

FIGURE 17 MID EASTERN MURRAY



Source: Urban Enterprise

## 10.2. PRODUCT STRENGTHS

Mid East Murray has a number of regional product strengths as shown in Table 13.

**TABLE 13** MID EAST PRODUCT STRENGTHS

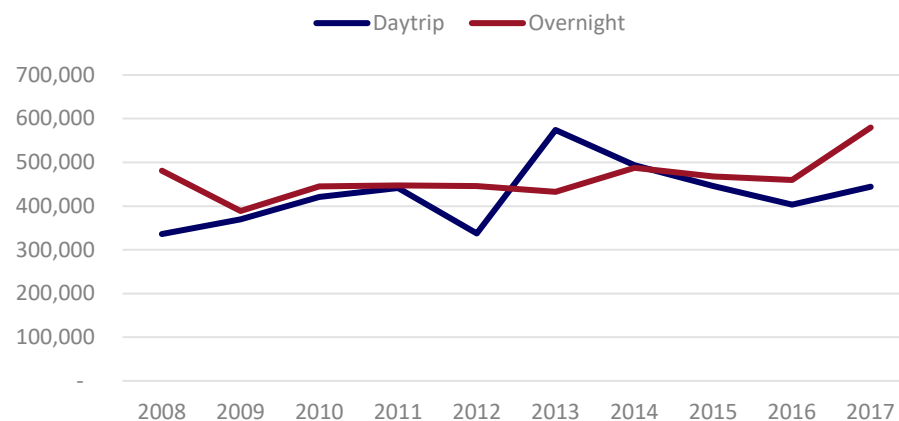
THEME	STRENGTHS	SUMMARY
<b>Rivers and Waterways</b>	Primary	Watersports are a major strength for this part of the River. There are a number of assets in the region which draw visitors and could be further enhanced for tourism. Major assets include <ul style="list-style-type: none"> <li>• Lake Mulwala –popular for water-based recreation including water skiing, fishing and boating.</li> <li>• The Murray River –popular for water skiing, swimming and fishing.</li> </ul>
<b>Clubs and Resorts</b>	Primary	There are a number of large clubs in the region that are key attractors for the region. These clubs often include collocated sports facilities, dining, accommodation and in most cases gaming venues.
<b>Golf</b>	Primary	The Mid Eastern Murray is one of the key golfing areas within the Murray. It has a wealth of high quality golf product.
<b>Nature and Parks</b>	Primary	The nature-based tourism assets in the Mid-Eastern Murray provide a strong motivator for visitation. <ul style="list-style-type: none"> <li>• Barmah National Park – This National Park is the largest River Red Gum forest in Australia with the Murray River traversing the forest and numerous waterholes and features throughout.</li> </ul>
<b>Dining &amp; Local Produce</b>	Secondary	A strong and developing food, wine and agritourism offer. Key attractions include: <ul style="list-style-type: none"> <li>• Corowa Whisky and Chocolate Factory – Whisky and chocolate tasting and sales.</li> <li>• Rutherglen Wine Region – Australia’s leading fortified wine region and renowned for Australia’s best Durif. Although not located in the sub-region, proximity to the wine region is a strength for the Mid Eastern Murray.</li> <li>• The Farm Gate Trail – A newly developed farm gate trail in the Sun Country Region, close to Cobram and Yarrawonga.</li> </ul>

### 10.3. VISITOR PROFILE

#### SUMMARY OF VISITATION TO MID EASTERN MURRAY (2017)



TABLE 14 MID EASTERN MURRAY VISITATION



Source: TRA NVS & IVS Visitation 2007-2017 YE June

The Eastern Murray receives over 1 million visitors per annum. Overnight visitation has grown by over 100,000 visitors over the past decade, and daytrip by 110,000 visitors.

Yarrawonga Mulwala and Cobram Barooga have grown in recent years both as a tourism destination and a lifestyle residential location.

Analysis of the sub-region's visitor profile (using TRA data) and consultation in the region identified the following features of Mid Eastern Murray's market:

- Strong holiday/leisure market with 59% of overnight visitors travelling for the purposes of a holiday (compared to 48% across the Murray Region).
- 80% of overnight visitors are from Victoria (56% from Melbourne, 24% regional Victoria). NSW makes up only 13% of overnight visitors.
- Slightly older visitor market with 36% of overnight visitors over 60 years old. The region has a number of excellent caravan site opportunities which are popular with grey nomads.
- Large number of holiday homes in Yarrawonga Mulwala.

## 10.4. PROJECT LIST

**TABLE 15** MID EASTERN MURRAY PROJECTS

TIER	LGA	LOCATION	TITLE	THEME	DESCRIPTION
1	Berrigan	Tocumwal	Tocumwal Foreshore Development	Nature-based	Implementation of the Tocumwal Foreshore Masterplan 2016 to include splashpark and play space, riverwalk, amphitheatre, VIC, and town square.
1	Federation	Corowa	Corowa Distilling Expansion Product	Food, Drink, and Agribusiness	Expansion of the popular attraction to include interactive whiskey tours spanning 4 levels of distillery, courtyard expansion and beautification for alfresco dining (seating for 180), grounds beatification and street frontage improvement, penthouse level whisky tasting, lifestyle gift store, and photography studio and gallery.
1	Federation	Mulwala	Mulwala Foreshore Development	Nature-based	Implementation of the Mulwala Foreshore Masterplan that includes multiple sites along the Foreshore. The plan focuses on improving public access to the lake and providing opportunities to participate in passive and recreational activities. This will be achieved through the development of community infrastructure such as playspaces, boat ramps, a fishing jetty, amenities, BBQ facilities and car parking. Landscaping and improvements to park furniture will create welcoming spaces that will increase visitation and support growth.
1	Moira	Yarrawonga	Yarrawonga Foreshore Improvements	River and Waterways	Implementation of the masterplan for the Yarrawonga town centre and lake foreshore identifying improvement opportunities as a result of the Yarrawonga Mulwala Bridge.
1	Moira	Yarrawonga	Silverwoods Yarrawonga Stage 2	Accommodation	The \$35 million waterfront development includes a 117-room boutique hotel and serviced apartments, and first class amenities including bar and bistro, fine-dining restaurant, 300-person conference facility, pool, and gymnasium. Stage 2 is expected to be completed by 2019. It follows the first stage of the development including the delivery of an 18-hole championship golf course and pro shop as well as around 200 homes to date.
1	Moira/Campaspe	Barmah National Park	Barmah National Park Tourism Development	Nature-based	Work with Parks Victoria, Campaspe Shire, and regional funding partners to progress a tourism development plan for Barmah National Park which identifies opportunities for nature-based and Indigenous tourism, private investment, and ongoing models to ensure maintenance of the park.
2	Berrigan	Various Berrigan Towns	Berrigan Shire Liveable Landscapes	Infrastructure, Transport and Servicing	A revitalisation project that contains a Retail and Hospitality Strategy, a Pedestrian and Parking Strategy, a Small Town Visitor Strategy and Arts and Culture Strategy. Masterplan is complete and adopted by Council. Ongoing and reprioritisation of strategies and identification of opportunities to leverage investment.

2	Berrigan / Moira	Berrigan & Moira	Berrigan Moira Sports Tourism Strategy	Sport and Recreation	A cross border Sports Tourism Strategy targeted at long stay, tier two sporting competitions. Cobram Barooga Business and Tourism, in partnership with Berrigan Shire Council and Moira Shire Council, has engaged a consultant to explore opportunities to attract more events to the region.
2	Federation	Mulwala	Mulwala High Quality Hotel / Serviced Apartment	Accommodation	Encourage the development of high quality hotel / serviced apartment type accommodation.
2	Federation	Oaklands	Oaklands RV Park	Accommodation	Construction of an RV Park in Oaklands and provision of facilities that will encourage RV enthusiasts to stop and stay, therefore increasing overnight visitation and supporting the local economy.
2	Federation	Corowa	Ball Park Caravan Park Redevelopment	Accommodation	Redevelopment of Ball Park Caravan Park including the purchase of new luxury cabins, significant landscape works aimed at helping to flood proof the site and construction of splash park.
2	Federation	Corowa	Federation Museum	Arts, Heritage and Culture	Development of the Federation Museum to complement existing facilities and enhance the tourism product offered by the region. Improvement of facilities will support volunteers and professionals in their role as custodians of the history, which is significant to local, regional and national audiences.
2	Federation	Corowa	Establish the Australian Institute of Comedy	Arts, Heritage and Culture	The board of the yet to be created Australian Institute of Comedy wishes to establish a permanent venue for housing the largest private collection of comedic material (the Crofts collection), to train comedians, to run festivals and to highlight the Australian sense of humour.
2	Federation	Corowa	Corowa Riverfront Revitalisation	Nature-based	Implementation of the Corowa Riverfront Masterplan including Bangerang Park redevelopment, boardwalk, walking trails, revegetation works, and interpretative signage. The next stage will include construction of a 100 metre boardwalk and 1.1 km riverside walking track that will improve local and visitor access to the river and interaction with the environment.
2	Federation	Mulwala-Corowa	Corowa Mulwala Cycleway	Nature-based	42.9km of bitumen trail will be developed along the riverfront, linking the two townships of Corowa and Mulwala and providing an interstate connection and link to the Murray River for the famous Murray to the Mountains Rail Trail. The cycleway will incorporate interpretative signage to further improve the visitor experience and will promote the dispersal of visitors between the two destinations and cross destination expenditure.
2	Federation	Bangerang	Bangerang Park Redevelopment	Nature-based	This component of the Corowa Riverfront Masterplan includes the construction of an Adventure Playground that will become the main playspace for the Corowa township. The existing toilet block at the site will be demolished and replaced with a new facility that provides all ability access and baby change facilities. Landscaping works, the provision of BBQ facilities and park furniture are also included as part of this redevelopment.
2	Federation	Urana	Urana Lake Masterplan	River and Waterways	Urana Lake is a key tourism growth asset for the area and a Master Plan will consider: <ul style="list-style-type: none"> <li>Potential commercial development and management of water supply within the Lake</li> </ul>



					<ul style="list-style-type: none"> <li>• Environmental management requirements</li> <li>• Potential Indigenous significance</li> <li>• Infrastructure requirements</li> <li>• Flood mitigation measures</li> </ul>
2	Federation	Corowa	Regional Boat Ramp	River and Waterways	Establishment of a regional standard boat ramp in Corowa that will provide access to the river all year (currently not available).
2	Federation	Mulwala	Mulwala All Abilities Adventure Playground	Sport and Recreation	The \$1.2 million 'All Abilities Adventure Playground' at Purtle Park in Mulwala is a significant development for the region. The space will provide challenging play equipment for all ages and will be surrounded by new amenities, a shade structure, footpaths, seating and landscaping. The family friendly area will contain a free-standing play system that will quite literally 'reach to the skies', with children able to move between Sky Cabins along swaying paths 8m above the ground
2	Federation	Corowa	Corowa Eco Tourist Resort	Accommodation	The development of a mixed use resort including glamping, caravan park and self contained with potential for school groups. This would take advantage of a river setting and environmental values.
2	Moirā	Barmah National Park	Yielima Tourist Park	Accommodation	Development of an eco-tourist park on land adjoining Barmah National Park. The private investment plan includes a full range of accommodation from dorm, hotel, motel, caravan park, and cabins totalling 1,000 beds. The development is still in the high-level concept phase.
2	Moirā	Yarrawonga	Yarrawonga Caravan Park Upgrade and Expansion	Accommodation	The Yarrawonga Caravan Park is currently planning for expansion to cater for increased demand. Early planning includes expansion into the neighbouring football oval.
2	Moirā	Cobram	Cobram Township Streetscape Pathways	Infrastructure, Transport and Servicing	Implementation of the Cobram Streetscape Plan including a public piazza near the Cobram VIC. Develop improved pathway connections within town, including linkages with Cobram RACV Resort to the town centre and riverfront.
2	Moirā	Cobram	Federation Park	Infrastructure, Transport and Servicing	Federation Park is the former train station which has been converted to public open space. The park forms the key gateway to the Cobram town centre and is also a rest stop for passing visitors. A masterplan identifying infrastructure improvements and opportunities to improve the park has been completed. This includes interpretive installations on the region's agricultural strengths.
2	Moirā	Cobram	Thompsons Beach Development	The River	Develop Thompsons Beach foreshore including an esplanade, commercial businesses, improved trails and tracks, events spaces, visitor signage and interpretation. Undertake a masterplan identifying precinct opportunities, planning barriers, and flood mitigation measures.
2	Moirā	Lower Ovens Wildlife Reserve	Lower Ovens Canoe Trails	The River	Investigate demand and feasibility for canoe trails and camping at Lower Ovens / Parolas, as outlined in the draft River Red Gum Management Plan,

3	Berrigan	Tocumwal	Tocumwal WW2 History Interpretation	Arts, Heritage, and Culture	Tocumwal's WW2 history as a US airbase, which took 16 weeks to build, is unique and the full story provides a fascinating insight into the Government thinking of the day. Currently, the Tocumwal Historic Aerodrome Museum is housed in the Tocumwal Bowling Club and is only open to the public by appointment. There is a good collection of photographs and newspaper clippings along with aeroplane models and other memorabilia that urgently need proper curation so as not to suffer permanent damage. A scoping study is underway to investigate options for the contemporary interpretation of this story.
3	Federation	Howlong	Howlong Riverfront Accommodation	Accommodation	Identify sites for nature-based accommodation on the Howlong riverfront
3	Federation	Urana	Horizontal Windmill Restoration	Arts, Heritage and Culture	This project involves the restoration of a unique Dexter Horizontal Windmill originally located on "Coonong" Station. The Dexter Horizontal Windmill was imported to Australia to drive water pumps and machinery on the rural property in the mid-1800s. It is thought to be one of only two remaining examples of this configuration of windmill to survive worldwide. Once complete, the restored windmill will be located where it can be inspected by the public.
3	Federation	Federation	Federation Public Art Trail	Arts, Heritage and Culture	Creation of a public art trail in the Federation Council area, which connects to attractions within neighbouring Council areas and encourages visitors to journey throughout the region.
3	Federation	Morundah	Paradise Palladium Theatre	Arts, Heritage and Culture	Upgrade and development of the Paradise Palladium Theatre will ensure this iconic facility continues to deliver local, state and nationally significant arts and culture events, driving visitation and economic growth for the region.
3	Federation	Corowa	Federation Visitor Precinct	Infrastructure, Transport and Servicing	Development of a Federation Interpretive Centre / hub that incorporates the delivery of Visitor Services, retail and dining, arts/culture space and commercial uses.
3	Federation	Corowa-Howlong	Corowa-Howlong Trail Connection	Sport and Recreation	Develop walking/cycling trails from Corowa to Howlong.
3	Federation	Urana	Urana Aquatic Centre	Sport and Recreation	Precinct study including Victoria Park, completion of pedestrian trail with construction of a bridge and feasibility for a conference centre.
3	Moirā	Nathalia	Nathalia Arts Development	Arts, Heritage and Culture	Harness the strong local arts community to help position and market the town as a 'boutique village' through continued development of the 'Grain Store' arts hub and promoting local arts events.
3	Moirā	Cobram	Cobram Community Cinema	Arts, Heritage and Culture	There has been interest in the development of a cinema complex in the Cobram CBD for a number of years to support the local community and visitors. There is a proposal to integrate with a Youth Drop in Centre which has gained some initial funding.

## 11. CENTRAL MURRAY

### 11.1. DESTINATION SUMMARY

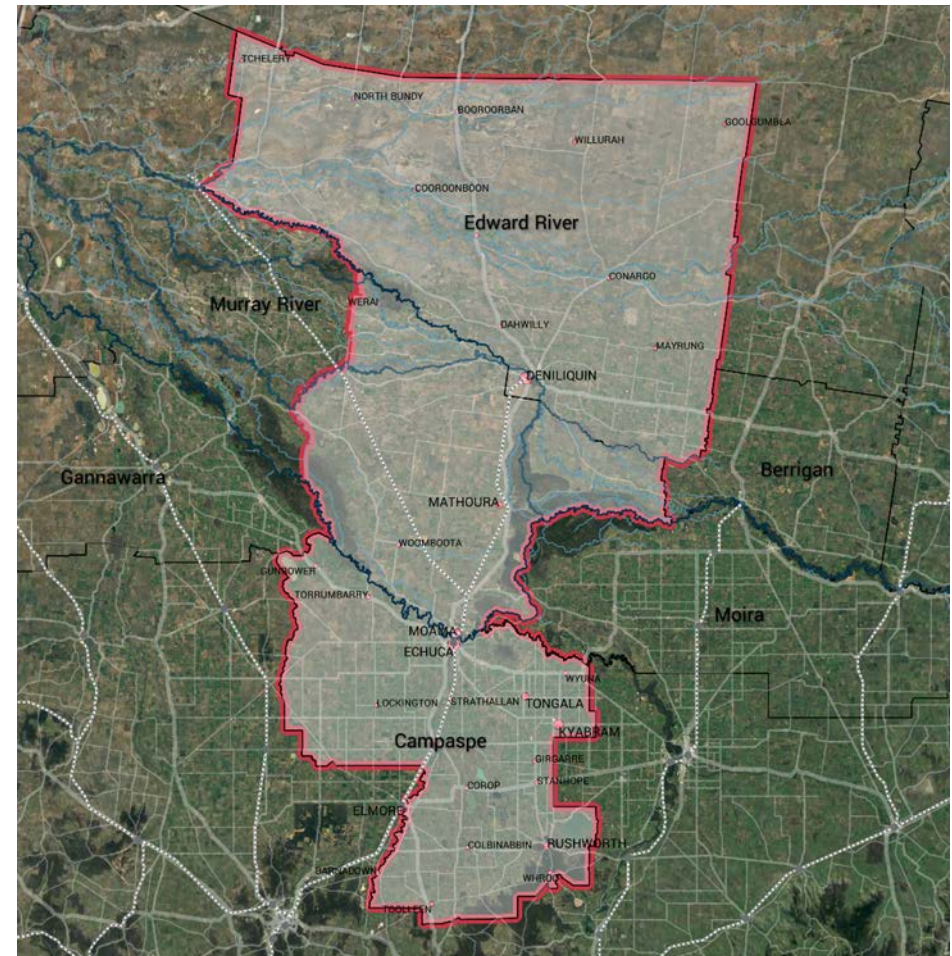
Central Murray consists of the Councils of Campaspe, Edward River, and the eastern half of Murray River Shire.

The region is strategically located as the closest river destination to Melbourne. The border towns of Echuca Moama are just 2.5 hours from Melbourne, at the junction of a number of key highways, and is the largest population and visitor centre in the region. Steeped in heritage, the twin towns are home to the world's largest fleet of operating riverboats, a heritage streetscape, and a hot spot for water sports and camping.

Deniliquin is only one hour north of Echuca, and is the largest regional centre to the north. The town is best known as the home to the Deni Ute Muster, the largest event in the region, and one of Australia's premier rural festivals. The town's location on the Edward River allows for a variety of water activities.

Barmah National Park is also within the Central Murray Region and Mathoura presents an opportunity for continued development as the gateway to the forest.

FIGURE 18 CENTRAL MURRAY SUB-REGION



## 11.2. PRODUCT STRENGTHS

Central Murray has a number of regional product strengths as shown in Table 16

**TABLE 16** CENTRAL MURRAY PRODUCT STRENGTHS

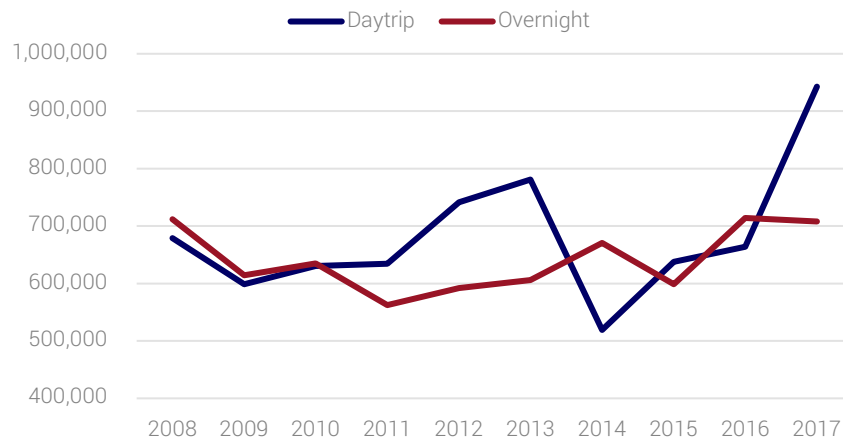
THEME	STRENGTHS	SUMMARY
<b>Rivers and Waterways</b>	Primary	The Murray River and the Edward River provide major tourism assets that support water based tourism including water skiing, cruising and fishing. Riverside tourist parks are also key assets for the region and some of the best tourist parks in Australia are located in the region.
<b>History and Heritage</b>	Primary	The Port of Echuca and associated paddlesteamers are icons of the Murray Region. Echuca Moama has the largest concentration of heritage paddlesteamers in Australia and the Wharf provides a unique heritage backdrop to the Murray River in this location. The heritage streetscapes of Echuca and Deniliquin provide unique examples of river towns that have retained much of their heritage assets.
<b>Events</b>	Primary	Echuca Moama and Deniliquin have a number of signature events that draw on a large number of visitors annually to the region. Signature events include: <ul style="list-style-type: none"> <li>• Deni Ute Muster.</li> <li>• Riverboats Music Festival.</li> <li>• Southern 80.</li> <li>• Winter Blues Festival.</li> </ul>
<b>Nature and Parks</b>	Primary	Barmah National Park is the largest River Red Gum forest in Australia with the Murray River traversing the forest and numerous waterholes and features throughout.
<b>Pubs, Clubs and Dining</b>	Secondary	Echuca Moama has a strong pub, club and dining offer suited to a range of markets. There are boutique dining experiences and good pub fair in the heritage centre of Echuca and there are large clubs in Moama that also cater for large groups and families. There are also a number of quality riverfront dining options.
<b>Arts and Culture</b>	Emerging	Although the region is not known as an arts and cultural destination, there has been some development of product (Foundry Art Space), and the Echuca-Moama Arts Bridge remains a significant opportunity to develop an attraction of State and National significance.

### 11.3. VISITOR PROFILE

#### SUMMARY OF VISITATION TO CENTRAL MURRAY (2017)



FIGURE 19 CENTRAL MURRAY VISITATION 2008-2017



Source: TRA NVS & IVS Visitation 2007-2017 YE June

The Central Murray receives over 1.6 million visitors per annum. Daytrip visitation grew strongly over the past decade, with an additional 260,000 daytrips, following a major uptick between 2016 and 2017.

Overnight visitation has remained somewhat flat reflecting the lack of major accommodation expansion in recent years.

Analysis of the sub-region's visitor profile (using TRA data) and consultation in the region identified the following features of Central Murray's market:

- Strong holiday/leisure market with 59% of overnight visitors travelling for the purposes of a holiday (compared to 48% across the Murray Region).
- 29% of overnight visitors are VFR.
- Events are an important driver, with 9% of overnight visitors coming to the region for the purpose of attending an event (the highest across the Murray).
- 81% of overnight visitors are from Victoria (51% from Melbourne, 30% regional Victoria). NSW makes up only 11% of overnight visitors.
- The region is a popular family destination, particularly for caravan and camping, with 23% of overnight visitors travelling as a family group (parents and children).

## 11.4. PROJECT LIST

**TABLE 17** CENTRAL MURRAY PROJECTS

TIER	LGA	LOCATION	TITLE	THEME	DESCRIPTION
1	Campaspe	Echuca	Port of Echuca Development	Arts, Heritage and Culture	Implementation of the Port of Echuca Strategic Plan including new river boat dock, and improved esplanade area.
1	Campaspe	Echuca	Echuca Train Services Upgrade	Infrastructure, Transport and Servicing	Upgrade of train services between Melbourne and Echuca to allow for greater daytrip visitation.
1	Campaspe / Murray River	Echuca Moama	Echuca Moama Conference Centre / Resort	Festivals, Events and Conference / Accommodation	A 400 to 500 capacity conference venue with attached accommodation (e.g. RACV Inverloch).
1	Campaspe / Murray River	Echuca - Moama	Echuca-Moama Art Bridge Project	Arts, Heritage and Culture	Development of a second river crossing, leveraging the surrounds for the development of an outdoor arts and recreation precinct. The Bridge Arts Project aims to provide a contemporary visual art-based record of the region's pre and post-colonial cultural development with a focus on the rich traditions of the Yorta Yorta Nation.
1	Campaspe / Murray River	Gunbower	Gunbower Tourism Investment Masterplan	Nature-based	Development of an eco-tourism plan for the Park and surrounds to identify infrastructure improvements, new experiences, and Indigenous storytelling.
1	Edward River	Deniliquin	Deniliquin Airport	Infrastructure, Transport and Servicing	Upgrade of Deniliquin Airport for major freight export, with opportunity for commercial passenger services.
1	Edward River	Deniliquin	Deniliquin Riverfront Precinct Masterplan	The River	Masterplan to improve the riverfront experience. There are a number of commercial sites in Deniliquin that should be transitioned to make the most of riverfront locations. There is currently no dining establishment with good views of the river.
1	Campaspe	Echuca	Echuca Visitor Events Precinct Plan	Festivals, Events and Conferences	Includes Aquatic Reserve Infrastructure & Service Plan, Echuca Arts and Culture Precinct Plan and Murray River Public Mooring. Development of a Visitor Events Precinct in Echuca that capitalises on the opportunities in an around the areas which include Aquatic Reserve, Onion Patch, Foundry Arts and Culture Precinct, the old Brothel overlooking the Murray River.



2	Murray River	Moama	Tindarra Resort Expansion	Accommodation	Expansion of a 200 seat function / conference centre on banks of river and potentially a restaurant. Currently in concept planning.
2	Murray River	Moama	Moama Bowling Club Resort Development	Accommodation	The Moama Bowling Club plans to develop 4 to 4.5 star resort style accommodation consisting of 65 luxury rooms. The development will also include a restaurant and bar plus conference rooms. Complementing the accommodation will be four resort style pools in addition to a spa and recreation facility.
2	Campaspe	Echuca	New Serviced Apartment / Motel	Accommodation	New serviced apartment / quality hotel development in Echuca.
2	Campaspe	Campaspe	Waranga Trail	Nature-based	Extension of the rail trail from Murchison to Rushworth. The extended rail trail would run from Murchison through Rushworth to Heathcote, as identified in the Loddon Mallee Regionally Significant Trails Strategy.
2	Campaspe	Girgarre	Gargarro Regional Botanic Garden	Nature-based	Development of a world class botanic gardens which includes an amphitheatre for events and functions. A staged long-term project. Funding has been secured for Stage 1 works.
2	Campaspe	Kyabram	Kyabram Fauna Park Development	Nature-based	Investment into the Fauna Park to provide an improved visitor experience. Development of a Business Plan to guide future investment.
2	Edward River	Shire Wide	Edward River Arts and Cultural Strategy	Arts and Culture	Development of an Arts and Culture Strategy to prioritise the development of new performance, gallery, and public art space.
2	Edward River	Deniliquin	Deniliquin Ute Museum and Infrastructure	Arts, Heritage, and Culture	A transport museum is currently being constructed on the Cobb Hwy by Neville Purtill, and The Ute Muster has received funding to develop a Museum and head offices at the Ute Muster site. The Ute Museum will house 20 years of Ute Muster memorabilia and will enable the site to be used year-round.
2	Murray River	Various	Backroads Trail	Food, Drink, and Agribusiness	Cook Book Project: Regional tour/guide for foodies that has been identified in Council's Strategic Plan.
2	Murray River	Moama	Moama Main Street Improvements	Infrastructure, Transport and Servicing	Funding is being sought for a master plan for Main Street improvements

2	Murray River	Mathoura	The Timbercutter	Accommodation	Expansion of the Timbercutter restaurant and function venue to include accommodation (20 cabins as part of stage 1) and walking tracks and viewing platforms of the Edward River.
3	Campaspe	Echuca	Foundry Arts Precinct	Arts, Heritage and Culture	Improvement of the arts offering in Echuca through continued development of the Foundry Precinct.
3	Edward River	Various	Long Paddock Touring Route	Food, Drink, and Agribusiness	Improvements to the popular touring route and Cattle Drive event.

## 12. MID WEST MURRAY

### 12.1. DESTINATION SUMMARY

The Mid West Murray includes the Councils of Gannawarra, Swan Hill, and the western half of Murray River.

Swan Hill is a major destination in the Murray Region and is at the heart of a major agricultural region.

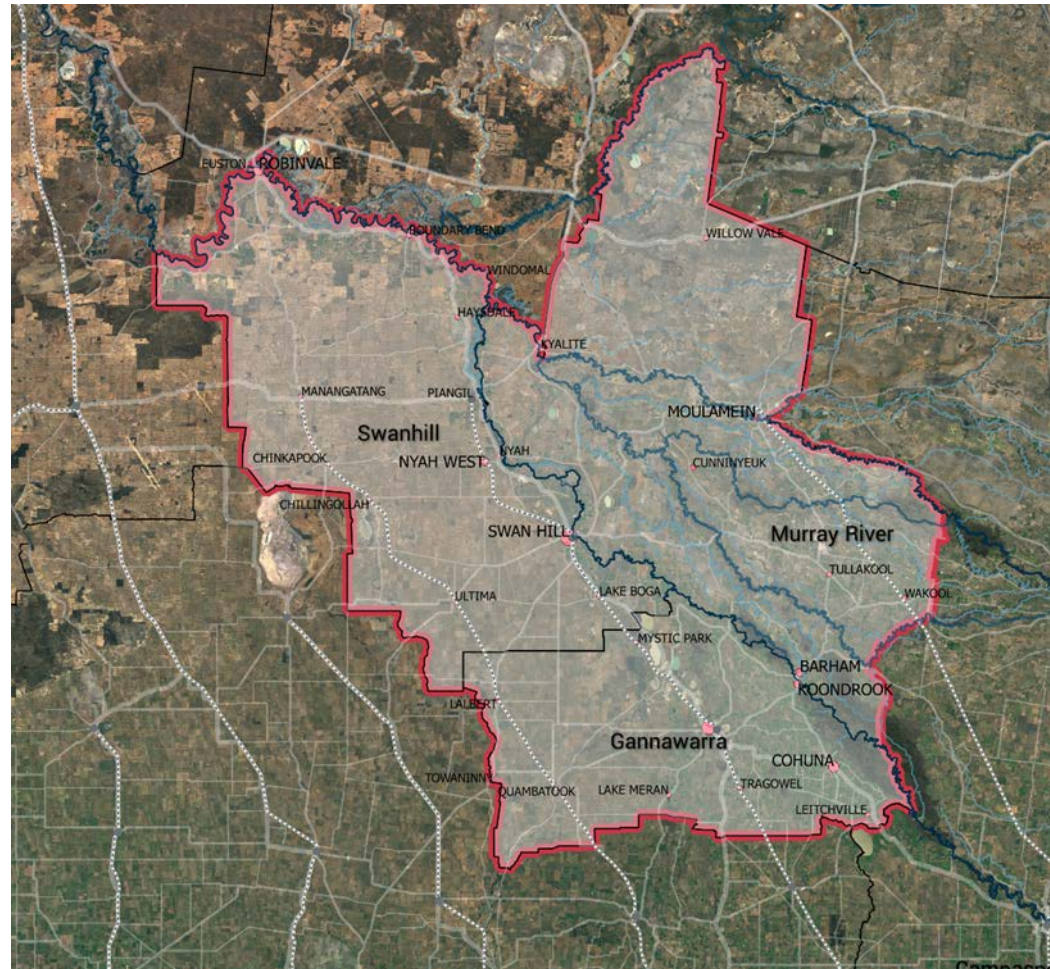
The strength of Swan Hill is its Murray Riverfront location providing the backdrop for water based activities, its recently refurbished and upgraded Pioneer Settlement heritage attraction and the highly rated Murray Downs Golf Course.

Gannawarra Shire has a number of strong nature based tourism townships and water assets including Koondrook, Cohuna, the Murray River, Kerang Lakes and Gunbower Forest. It has a strong agricultural economy underpinned by the dairy industry.

Lake Boga also provides for a strong water based attraction in the region and has a strong heritage link with the Flying Boat Museum located there.

Lake Tyrell sits just outside of the region, but has benefitted in recent years from an influx in international visitors. Opportunities to draw these visitors to the Murray should be considered.

FIGURE 20 MID WESTERN MURRAY SUB-REGION



## 12.2. PRODUCT STRENGTHS

Mid West Murray has a number of regional product strengths as shown in Table 18.

**TABLE 18** MID WEST MURRAY PRODUCT STRENGTHS

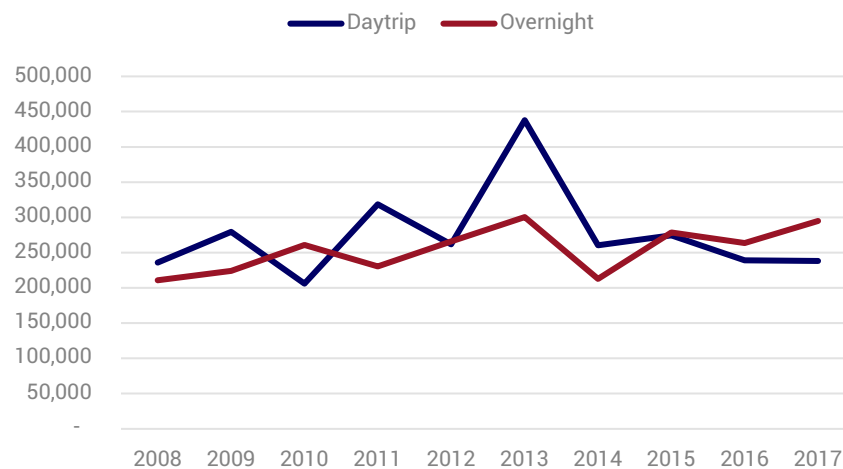
THEME	STRENGTHS	SUMMARY
<b>Rivers and Waterways</b>	Primary	With numerous lakes and waterways throughout the region, it offers some of the best fresh water fishing and water skiing in Australia. Key assets include: <ul style="list-style-type: none"> <li>• The Murray River.</li> <li>• Lake Boga.</li> <li>• Lake Charm.</li> <li>• Kangaroo Lake.</li> </ul> Lake Tyrell is also a significant destination which sits just outside the region.
<b>History and Heritage</b>	Primary	The region has a number of heritage assets that attract visitors. The key heritage assets include Pioneer Settlement, Koondrook Wharf and Arbuthnot Sawmill, the Flying Boat museum and military history associated with Lake Boga, and Robinvale.
<b>Golf</b>	Primary	This sub-region has two golf courses that act as important drivers for visitation, Murray Downs, which is ranked as one of the best golf courses in the Murray, and Barham Golf and Sports Club.
<b>Nature and Parks</b>	Primary	The Mid West Murray has a strong nature-based product profile. Gunbower National and State Park has potential to be one of three iconic National Parks associated with the Murray. There is opportunity to grow visitation to these assets with enhanced visitor infrastructure and experiences.
<b>Events</b>	Secondary	The region hosts a number of major events particularly food and wine and recreational activities such as sporting event (tennis, basketball, motorsports) and water craft activities.
<b>Arts and Culture</b>	Emerging	Although the region is not known as an arts and cultural destination, the Swan Hill Regional Art Gallery houses unique exhibitions year round.

## 12.3. VISITOR PROFILE

### SUMMARY OF VISITATION TO MID WESTERN MURRAY (2017)



**FIGURE 21** MID WESTERN MURRAY VISITATION 2008-2017



Source: TRA NVS & IVS Visitation 2007-2017 YE June

The Mid Western Murray receives over 540,000 visitors per annum. Overnight visitation grew by 80,000 visitors over the past decade, and daytrips remained relatively flat (despite a jump in 2012-13).

Analysis of the sub-region's visitor profile (using TRA data) and consultation in the region identified the following features of Mid Western Murray's market:

- 76% of overnight visitors are from Victoria (35% from Melbourne, and 41% regional Victoria).
- Visitors from NSW account for only 11% of overnight visitation.
- 48% of overnight visitors are for the purposes of holiday/leisure.
- VFR is an important market for the region accounting for 33% of overnight visitation. Business travellers represent 15% of all overnight visitors.

## 12.4. PROJECT LIST

**TABLE 19** MID WEST MURRAY PROJECT LIST

TIER	LGA	LOCATION	TITLE	THEME	DESCRIPTION
1	Gannawarra	Koondrook	Koondrook Arts Precinct and Murray River Brewing	Food, Drink and Agribusiness / Arts Heritage and Culture	The development of a new brewery and distillery at the Koondrook Packing Shed. The investment would rejuvenate a heritage building, provide a significant new food destination for the region, align and complement other major tourism investments in the local area, and strengthen Koondrook as a destination. The co-located Butter Factory is also proposed to be developed into a diverse arts and business precinct with brewing, coffee roasting, chocolate, food and wine, and a range of artists in house.
1	Gannawarra	Kerang, Koondrook, Cohuna	Kerang Lakes, Koondrook and Cohuna Waterfront Masterplans	The River	There is opportunity to greatly improve the tourism experience in Gannawarra's key tourism destinations through improved infrastructure, food and retail and nature based experience development. A masterplan has been funded by Gannawarra Shire and the State Government that will identify key areas for improvement in Gannawarra's major tourism assets.
1	Swan Hill	Swan Hill	Swan Hill Serviced Apartment Hotel	Accommodation	Provide long and short stay accommodation in Swan Hill, a key existing gap in the region. The Swan Hill Riverfront Commercial Development Strategy 2017 provides a comprehensive analysis of potential sites.
1	Swan Hill	Swan Hill	Swan Hill Regional Art Gallery Expansion and Indigenous Experience	Arts, Heritage and Culture	Council are currently planning for the future expansion of the Swan Hill Regional Art Gallery. Murray River Interpretive Centre Feasibility Study 2017 preferred model is to combine the Art Gallery with an Information Centre and the new interpretive centre. This includes a new Indigenous experience including corroborees, walking tracks, and canoe trees.
1	Swan Hill	Swan Hill Riverfront	Swan Hill Riverfront Masterplan Stage 2	The River	Implementation of the Swan Hill Riverfront Masterplan including a commercial development strategy to link the river to the CBD, an active play space and the installation public related infrastructure to active the river.
2	Gannawarra	Koondrook	Farm 253	Food, Drink and Agribusiness	A new agritourism facility including on-farm food and produce, and catering.
2	Gannawarra	Koondrook	Railway Goods Shed Development	Food, Drink and Agribusiness	Convert the goods shed into a boutique food and wine store/restaurant.
2	Gannawarra	Kerang	Kangaroo lake	Nature-based	Foreshore development project to better accommodate events and encourage up-market accommodation in the Caravan park.



2	Gannawarra	Kerang	Kerang - Koondrook rail trail	Nature-based	Walking and cycling connection between Kerang and Koondrook.
2	Gannawarra	Cohuna	Murray River adventures	Nature-based	Develop a location for kayaking lessons, tours and hire, forest cycling tours and Indigenous tours.
2	Gannawarra	Koondrook/Cohuna	Overnight Horse Riding Trails	Nature-based	Develop overnight horse/MTB trails through Gunbower State Forest btw Koondrook and Cohuna.
2	Murray River	Barham	Barham Pontoons	The River	Construction of a boat mooring / pontoon as an addition to the Barham Boardwalk. This will enable vessels to moor at the Boardwalk and access the township businesses without the need to remove their boat from the water. It would provide access for and entice paddlesteamers to visit Barham more regularly from Echuca, creating connections along the river. It will allow recreational vessels a safe place to moor and access the shore. The mooring / pontoon will also add to the creation of a recreational precinct along the boardwalk area. A previously a neglected and underutilised area of the river, right in the centre of the CBD, will be transformed into an accessible, active and lively centre that connects the community directly to the river.
2	Swan Hill	Lake Boga	Lake Boga Waterfront Resort	Accommodation	A resort on the edge of Lake Boga would help establish it as a tourism destination, particularly for those interested in water sports. The resort would also support other tourism products in the area, such as the Flying Boat Museum and the nearby Kerang Lakes.
2	Swan Hill	Robinvale	Backpackers/Seasonal Workers Accommodation	Accommodation	There is strong need for backpacker accommodation in Robinvale. Council are currently working with private commercial operators to create new accommodation facilities within Robinvale as well as conduct a housing summit during early part of 2018.
2	Swan Hill	Swan Hill	Redevelopment of Grain Silo Site	Accommodation	Development of the Graincorp site with café/tavern and apartments. Identified as the preferred development for the riverfront precinct in the Swan Hill Riverfront Commercial Development Strategy 2017.
2	Swan Hill	Swan Hill	Heritage Buildings Restorations	Arts, Heritage and Culture	Secure a fund for the restoration and maintenance of heritage buildings e.g. Swan Hill Town Hall & Tyntynder Homestead.
2	Swan Hill	Nyah West Lake Boga & Robinvale	Silo Art Trail	Arts, Heritage and Culture	Provide opportunity for rural townships of Nyah West, Lake Boga and Robinvale to be part of the North West Silo Art trail. Seeking to include new elements to the project, such as lighting.
2	Swan Hill	Swan Hill	Swan Hill Conference and Event Facility	Festivals, Events, and Conferences	Swan Hill does not have a facility for small to medium conferences and events, such as weddings: a capacity between 200-300 banquet guests is required. Identification of suitable sites, infrastructure and economic modelling highlighted in the Swan Hill Riverfront Commercial Development Strategy 2017 support such development in the riverfront precinct.

2	Swan Hill	Swan Hill	Food Trails	Food, Drink and Agribusiness	Develop and promote seasonal food trail from Lake Boga to Robinvale.
2	Swan Hill	Robinvale	Review Robinvale Riverfront Masterplan	Infrastructure, Transport and Servicing	Review Robinvale Riverfront Masterplan to identify new tourism development opportunities.
2	Swan Hill	Robinvale	Activate Bromley Road	Infrastructure, Transport and Servicing	Improve entrances into Robinvale from the Murray Valley Highway as well as improving access to key features within the township such as CBD, Information Centre, and Rural Life Museum.
2	Swan Hill	Swan Hill	Rail Services	Infrastructure, Transport and Servicing	The introduction of rail services linking Melbourne and Swan Hill has been identified by the community as a key project.
2	Swan Hill	Pental Island	Pental Island Wildlife Reserve	Nature-based	Pental Island, located between the Murray River and the Little Murray River at Swan Hill provides an opportunity to develop wildlife and nature based tourism experiences within the proposed tourism precinct. The island is accessible via a foot bridge from the Pioneer Reserve, and leads into the remnant wetlands on the island.
2	Swan Hill	Swan Hill region	Lake Tyrell Tourism Project and Visitor Dispersal	Nature-based	There is currently a Tourism Strategy for Lake Tyrell being developed to leverage the recent influx of Chinese visitors and increase spending in the region. Although Lake Tyrell is outside of the MRT region, there are opportunities for the Swan Hill region to tap into this growth and draw visitors up to the Murray, particular with the product offering at Pioneer Settlement and Heartbeat of the Murray.
2	Swan Hill	Chisholm Reserve	Chisholm Reserve Motorsports Complex	Sport and Recreation	To further support the development of Chisholm Reserve Complex to a regional and national level, the need to update and or develop new infrastructure and facilities is required.
2	Swan Hill	Swan Hill/Lake Boga	Swan Hill - Lake Boga Bike Trails	Sport and Recreation	Swan Hill to Lake Boga Active Trail - planning and designs have been undertaken, including cost benefit analysis. Estimated cost of \$2.3m.
3	Gannawarra	Cohuna	Waffles - Factory & Field	Food, Drink and Agribusiness	New eatery linked to Factory & Field.
3	Gannawarra	Koondrook	Forest tracks and trails	Nature-based	Connect the nature-based tourism hub with walking, cycling and kayaking trails via the forest.
3	Gannawarra	Koondrook	Horse yards in forest	Nature-based	Redevelop the old cattle yards to use as a horse riding trails camp in Gunbower Forest.

3	Gannawarra	Koondrook/Cohuna	Murray Gathered & Grown	Nature-based	Develop a food and cultural trail from Koondrook to Campaspe.
3	Gannawarra	Cohuna	Stillwater paddleboards	Nature-based	Host stand-up paddleboard lessons and hire on the Gunbower Creek.
3	Gannawarra	Cohuna	The Blandowski Project	Nature-based	Develop a museum-based project that showcases the Blandowski bioscan work of the Gunbower Forest.
3	Gannawarra	Cohuna	Treetops Camp	Nature-based	Look at ways of enhancing the site's infrastructure and connecting to tracks and trails.
3	Gannawarra	Cohuna	Cohuna Ski Run	Nature-based	Redevelop the Cohuna ski-run.
3	Gannawarra	Koondrook	Arbuthnot sawmill walkway	The River	A walkway and viewing platform to allow people to view the mill's operation.
3	Murray River	Moulamein Homestead	Moulamein Homestead Refurbishment	Arts, Heritage and Culture	Reinvestment into the historic homestead.
3	Murray River	Moulamein	Moulamein Heritage Village Hub	Arts, Heritage and Culture	The Moulamein Heritage Village Hub is a community venture that will see the establishment of Moulamein heritage village hub to showcase the Moulamein township, surrounding district, tell its stories and contribute to a thriving local community. It includes a number of historic buildings and objects that would be restored and act as a focal point for visitors. A community group is currently seeking funding for a heritage study and business plan.
3	Murray River	Barham	Bundarra Berkshires	Food, Drink and Agribusiness	Bundarra Berkshires plan to double the size of their current operation, including a shop, butchery, retail space, and offer of tasting plates, and they'll run workshops, and visitors will be welcome to drop in.
3	Murray River	Barham	Farmhouse Cheese Factory	Food, Drink and Agribusiness	The Farmhouse Cheese Factory is located just out of Barham and will use local milk to produce cheese, it will include accommodation, offer workshops and visitors will be able to drop in to the facility and experience the cheese and cheese-making.
3	Murray River	Moulamein	Bike Trail	Nature-based	A new bike trail for Moulamein.
3	Swan Hill	Swan Hill region	Public Artwork Program	Arts, Heritage and Culture	Town beautification and developing stronger sense of place/identity.
3	Swan Hill	Swan Hill	Swan Hill Solar Viewing Platform	Infrastructure, Transport and Servicing	Development of an elevated, covered viewing platform that provides great vantage point from which to view the expansive solar farm in Swan Hill. Would house information about the solar plant to help educate visitors.

3	Swan Hill	Nyah	Nyah-Vinifera Park	Nature-based	Provide high quality and memorable experiences for visitors and locals by creating interactive walk through the Nyah-Vinifera Park.
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## 13. WESTERN MURRAY

### 13.1. DESTINATION SUMMARY

The Western Murray is a large sub-region consisting of the Councils of Mildura and Wentworth.

The region is characterised by its arid outback landscape, flat topography, and charming towns. The unique setting provides a visitor experience more akin to central Australia than the rest of the Murray Region.

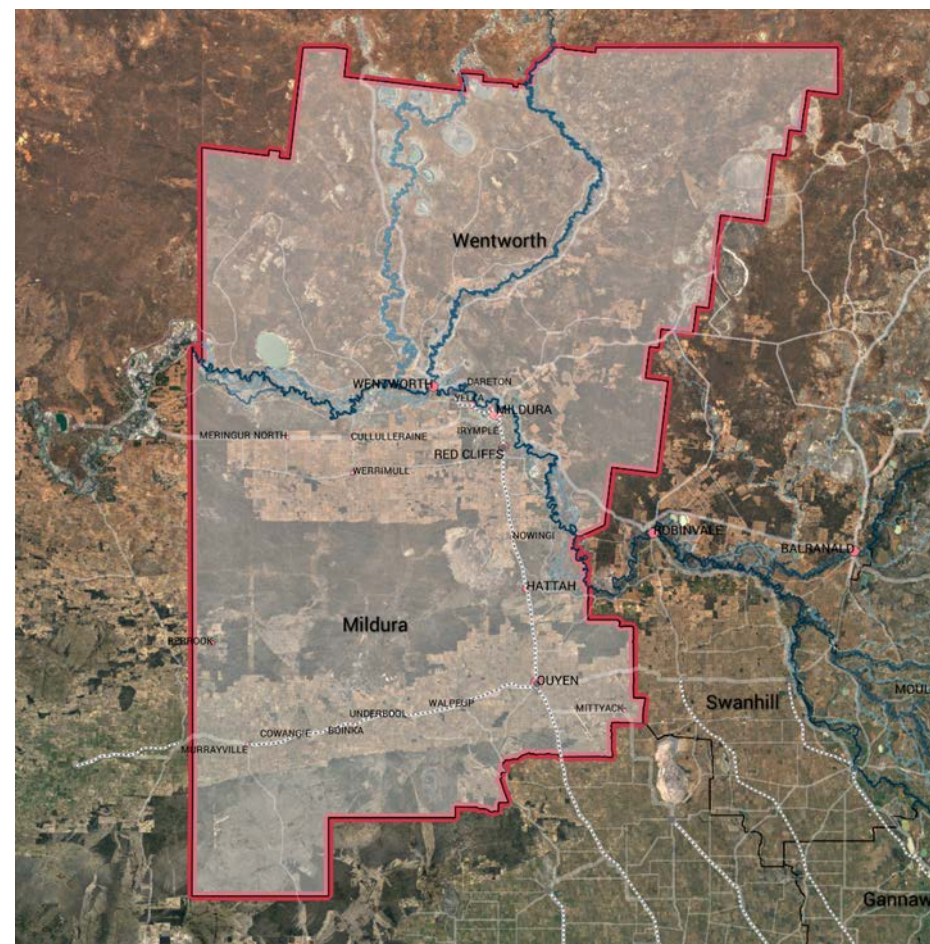
The region is an important foodbowl and major producer of grapes, fruit and citrus. There has been an increase in accessible agritourism opportunities with the development of new facilities within proximity to Mildura and Wentworth.

Nature-based tourism is the major strength of the region which includes a number of key natural sites including the culturally significant Mungo National Park, the Murray-Darling River Confluence, and Yanga National Park. The region includes the two largest rivers in Australia: Murray and Darling, making it a popular location for fishing and watersports.

Mildura is the major regional centre in the western Murray and the wider Mallee region. Wentworth is located at the confluence of Australia's two largest rivers, just 20 minutes from Mildura, and together function as important border towns. Mildura has a regional airport which services a number of major capital cities, and acts as the major gateway for visitors to the region.

The region is unique in that it consists of both Victoria and NSW, and shares a border with SA to the west.

FIGURE 22 WESTERN MURRAY



### 13.2. PRODUCT STRENGTHS

Western Murray has a number of regional product strengths as shown in Table 20.

**TABLE 20** WESTERN MURRAY PRODUCT STRENGTHS

THEME	STRENGTHS	SUMMARY
<b>Rivers and Waterways</b>	Primary	There are a number of river systems that traverse the region making it a popular location for fishing and water sports.
<b>History and Heritage</b>	Primary	There are a number of unique and charming outback towns throughout the region that provide a historical account of outback settlement and Australian rural life. The Chaffey Trail tells the story of how Mildura became Australia's first irrigated settlement.
<b>Food, Wine and Agritourism</b>	Primary	The region is known as a major 'food bowl' and prides itself on the abundance of fresh, locally grown produce. There has been a recent increase in the number of accessible farm gate experiences which have been included in a new Mildura Taste Trail.
<b>Nature and Parks</b>	Primary	Nature-based tourism is the major strength of the region, which boasts a number of National Parks and attractions including the iconic Mungo National Park, Yanga National Park, Hattah Kulkyn National Park, Murray Darling Confluence, and Perry Sandhills.
<b>Golf</b>	Primary	The region has a number of top golf clubs with riverfront courses that cater to a variety of standards.
<b>Events</b>	Secondary	Mildura Wentworth hosts a busy events calendar, with a particular strength in sports events.
<b>Arts and Culture</b>	Emerging	Mildura Wentworth has a vibrant arts community and a number of galleries and performance spaces showcasing local and touring exhibitions.

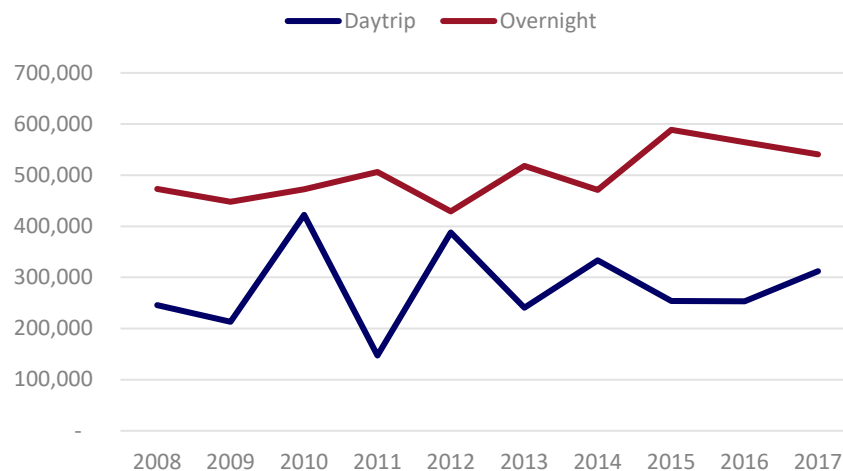


### 13.3. VISITOR PROFILE

#### SUMMARY OF VISITATION TO WESTERN MURRAY (2017)

<b>312,000</b> DOMESTIC DAYTRIP VISITORS	<b>540,000</b> DOMESTIC OVERNIGHT VISITORS	<b>23,000</b> INTERNATIONAL VISITORS
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FIGURE 23 WESTERN MURRAY VISITATION 2008-2017



Source: TRA NVS & IVS Visitation 2007-2017 YE June

The Western Murray receives over 870,000 visitors per annum. The region experienced steady growth over the past decade. Overnight visitation grew by 70,000 visitors, and daytrips by 66,000.

Interestingly, the Western Murray receives the highest number of international visitors across the entire Murray Region. This is likely due to the high number of backpackers undertaking farm work in the region.

Analysis of the sub-region's visitor profile (using TRA data) and consultation in the region identified the following features of Mid Western Murray's market:

- 48% of overnight visitors are for the purposes of holiday/leisure, 27% are for VFR, and 18% for business purposes.
- 50% of visitors are from Victoria (25% Melbourne and 25% regional Victoria).
- The region receives a strong South Australia market with 16% of visitors from Adelaide and 9% from regional SA. NSW represents 20% of visitation.

## 13.4. PROJECT LIST

**TABLE 21** WESTERN MURRAY

TIER	LGA	LOCATION	TITLE	THEME	DESCRIPTION
1	Mildura	Mildura	Mildura Motor Sports Precinct	Sport and Recreation	Progression of the Mildura Motor Sports Precinct as outlined in the Business Case and Staged Development Plan.
1	Mildura	South Mildura	Mildura South Sporting Complex	Sport and Recreation	Development of a regional sporting precinct in accordance with the Business Case. Including six indoor courts, two fields, and a 3,000 seat venue which can be used for a range of purposes.
1	Mildura	Mildura	Mildura Riverfront Stage 2	The River	Stage 2 of the Riverfront development including linkages with the CBD, commercial activation, concepts for the Powerhouse building, conference centre, and other attractions.
1	Mildura / Wentworth	Various	Gateway to the Outback Positioning	Nature-based	The region has the opportunity to position itself as a gateway to the Australian Outback, providing a more accessible and inexpensive experience to rival the Northern Territory.
1	Wentworth	Wentworth	Mungo All Weather Road	Infrastructure, Transport and Servicing	Lake Mungo National Park cannot be accessed from either Mildura or Balranald following rainfall, impacting on tour operators and international visitors who have booked trips to the Willandra Lakes World Heritage Area. The road upgrade will also need to include the main routes through the area, as they are also not accessible following rain.
1	Wentworth	Wentworth	Wentworth Riverfront Development	The River	Long term planning for the future expansion of the Wentworth Riverfront precinct from the Wentworth Civic Centre to Willowbend Caravan Park focusing on linkages to existing facilities and concepts for future attractions. Currently at Concept Stage.
1	Wentworth	Wentworth	Wentworth Riverfront Development	Accommodation	The development of a large-scale riverfront eco resort in close proximity to Mildura and Wentworth. This is currently in the high-level concept stage but would fill an important gap and have a significant impact on the region.
2	Mildura	Mildura	Mildura Arts Centre Future Expansion	Arts, Heritage, and Culture	Long term planning for the future expansion of the arts centre to provide for greater capacity to accommodate larger exhibitions.
2	Mildura	Mildura	Mildura Passenger Rail Services	Infrastructure, Transport and Servicing	Development of rail passenger services for Mildura to connect Melbourne.
2	Mildura	TBD	Adventure Tourism Concepts	Sport and Recreation	Development of a new adventure tourism concept for the Murray to cater for the large backpacker population and provide a unique experience in the region. E.g. bungee jumping, jetboating

2	Mildura	Hattah Kulkyl NP	Activation of National Parks	Nature-based	Investigate the feasibility of new types of accommodation, such as safari tents, and after-dark and early-morning tours in Hattah Kulkyl NP and Kings Billabong Park, as outlined in the draft River Redgum Management Plan.
2	Mildura / Wentworth	Wentworth/ Mildura	Business Events Strategy	Festivals, Events, and Conferences	Leverage existing infrastructure to attract more business events.
2	Mildura / Wentworth	Mildura- Wentworth	Mildura Culinary Food Plan	Food, Drink and Agribusiness	An initiative by Mildura Regional Development to connect local producers to restaurants and develop Mildura's food offering.
2	Mildura / Wentworth	Mildura- Wentworth	Commercial Tour Operator Development	Infrastructure, Transport and Servicing	Positioning the region as the gateway to the outback and a number of eco-tourism opportunities, and developing as a base for commercial tour operators. Undertake a study to identify barriers and compliance issues that may be addressed.
2	Mildura / Wentworth	Mildura- Wentworth	Mildura – Gol Gol Bridge River Crossing	Infrastructure, Transport and Servicing	There are significant traffic volume projections between Mildura and Gol Gol and long-term planning is required to understand the need for an additional river crossing and potential bypass of the Mildura CBD.
2	Wentworth	Pooncarie	Pooncarie Camping Facilities	Accommodation	Ongoing development of an RV Camping facility at Pooncarie including installation of filtered water and power. Currently seeking funding, estimated investment \$100,000.
2	Wentworth	Wentworth	Wentworth Effluent Disposal Systems	Infrastructure, Transport and Servicing	Upgrade of existing facilities at Wentworth and Dareton. These facilities are used by house boats to dispose of waste products. These facilities are 30 years old and are vital to the continued success of the house boating industry in the Mildura/Wentworth region. Designs have been prepared and the project is currently seeking funding. Estimated investment is \$2,000,000.
2	Wentworth	Mungo NP	Mungo Visitors Centre	Nature-based	Improvements to the Mungo Visitors Centre to include enhanced interpretation and story telling of the significant heritage area.
2	Wentworth	Murray-Darling Confluence	Great Murray Darling Junction Reserve	Nature-based	To implement the actions and recommendations of the Great Murray Darling Junction Reserve Plan of Management. Currently seeking funding, estimated investment \$2,000,000. This includes improved access, interpretive displays, and potential water interpretation installations.
2	Wentworth	Buronga	Buronga Riverfront	Nature-based	Implement the actions/recommendations of the Buronga Riverfront Master Plan. Currently seeking funding, estimated investment \$1,000,000.
2	Wentworth	Wentworth	Aviation Precinct	Infrastructure, Transport and Servicing	Long-term planning for the Wentworth Airport to seal the runway (business case already complete), and investigate opportunities to increase private aviation, emergency services, and residential development (private hangars adjoined to residential). This would need to complement the commercial role of Mildura Airport.
3	Wentworth	Wentworth	Wentworth Willow Bend Caravan Park	Accommodation	Council has secured a new operator on two-year contract and is looking to upgrade the park. Currently in the planning stage with an estimated \$3m of investment required.

3	Wentworth	Trentham	Caravan Park Refurbishment	Accommodation	Refurbishment of an existing caravan park to improve the visitor offering and attract new markets.
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# APPENDICES

## APPENDIX A LITERATURE REVIEW

This section provides a summary of key State and Federal tourism strategies relevant to the Murray Region, to identify areas of focus and priority development objectives for the region.

Recommendations in the Murray DMP will align with federal and state strategies.

### STATE STRATEGY

#### VICTORIAN VISITOR ECONOMY STRATEGY, JULY 2016

The Victorian Visitor Economy Strategy provides state wide direction for the growth of the tourism industry. The Strategy aims to increase visitor spending to \$36.5 billion by 2025 through these nine priority goals which include:

- More private sector investment.
- Build on the potential of regional and rural Victoria.
- Improve branding and marketing.
- Maximise the benefits of events.
- Improve experiences for visitors from Asia.
- Better tourism infrastructure.
- Improve access into and around Victoria.
- Skilled and capable sector.
- More effective coordination.

#### FINAL REPORT OF THE VISITOR ECONOMY TASKFORCE

The Final Report of the Visitor Economy Taskforce provides an ambitious plan to double overnight visitor expenditure to NSW by 2020. The report recognises four key external market challenges that NSW needs to respond to if it is to achieve the 2020 target. These are:

- Competition is increasing.
- Global travel conditions and visitor expectations are changing.
- The domestic economy is changing.
- Technology is increasingly influencing consumer behaviour.

The plan then sets out seven strategic imperatives to achieve the proposed growth. These include:

- Strategic Imperative 1: Increase visitation
- Strategic Imperative 2: Grow physical capacity
- Strategic Imperative 3: Renew and revitalise NSW destinations
- Strategic Imperative 4: Improve the visitor experience
- Strategic Imperative 5: Increase visitor spend
- Strategic Imperative 6: Make NSW more competitive
- Strategic Imperative 7: Change of mindset.

#### NSW ABORIGINAL TOURISM ACTION PLAN 2017-2020

The Plan builds on the 2013-2016 Action Plan, which included 26 separate actions that have been achieved. The next phase of the Action Plan 2020 will capitalise on the opportunities presented by the growing interest and demand for Aboriginal experiences among an increasingly diverse range of traveller and consumer interests. The vision is to continue to support the development and promotion of NSW Aboriginal cultural tourism experiences, products and businesses leading to:

- A greater understanding of the richness of Aboriginal culture.
- Economic and social benefits for Aboriginal people, both as operators and employees.

## NSW REGIONAL CONFERENCING STRATEGY AND ACTION PLAN 2017- 2021

The NSW Regional Conferencing Strategy recognises the significant economic impact and employment benefits of the conferencing sector to Regional NSW. The Strategy outlines that the sector generates \$290 million by delegates through Regional NSW, with additional visitor expenditure of \$11.6 million and employment of more than 2,300 people.

In regard to venues in the Murray, the Strategy recognises the following:

- The Albury Entertainment Centre caters for up to 1000 delegates. The destination needs additional 4-4.5 star accommodation in the region to support these facilities when attracting certain segments of the market. This would need to be considered to increase the business conference sector in this area. Currently the region is better suited to conferences of 200-300 delegates. There are several clubs and 3.5 star hotels to support these capacities.
- Quest Albury, Novotel Albury and Cadell on Murray have meeting facilities.
- Pertinently, the industries that represent targets for business conferencing for the Murray are Land Irrigation; Rice Production; Food Agriculture and Production; Wine and Viticulture. While in the Murray Region; Food Manufacturing; Food Agriculture and Dairy Farming; and Production are recognised as the clients and services target industries and business sectors.

## APPENDIX B DATA SOURCES

The main data sources used in the analysis of visitation to the Murray is the surveys undertaken by Tourism Research Australia, the National Visitor Survey and the International Visitor Survey. Where applicable, data from the Australian Bureau of Statistics is used to support the analysis.

### NATIONAL VISITOR SURVEY (NVS)

Tourism Research Australia is responsible for conducting the National Visitor Survey. 120,000 Australian residents are interviewed annually about their travel for the NVS, capturing interstate and intrastate visitation. The information NVS provides includes visitor destinations, origins, activities, nights spent, travel methods, activities and expenditure.

Daytrips are only included in the NVS if the respondent travelled more than 50 kilometres from their residence and spent more than 4 hours at the destination.

### INTERNATIONAL VISITOR SURVEY (IVS)

Tourism Research Australia also conducts the International Visitor Survey. The IVS is conducted in the departure lounges of 8 international airports in Australia: Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast. 40,000 departing tourists are interviewed about their time in Australia.



**Urban Enterprise**

389 St Georges Road,  
Fitzroy North, Vic, 3068

(03) 9482 3888

**[www.urbanenterprise.com.au](http://www.urbanenterprise.com.au)**

