

Destination Management Plan 2023-2027

2025 UPDATE



DECEMBER 2025

An aerial photograph of a vast, golden sand dune landscape. The dunes are covered in fine, wavy ripples. A long, winding trail of footprints leads from the bottom left towards the center of the frame. On the right side, a group of about seven people are walking across the dunes, their long shadows cast to the right. The bottom left corner features a dense patch of green, low-lying vegetation. The overall scene is bright and sunny, with a warm, orange-gold color palette.

ACKNOWLEDGEMENT OF COUNTRY

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

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

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

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

The Murray Region Destination Management Plan has been prepared by Murray Regional Tourism to guide the future of the region's visitor economy between 2023 to 2027. This Destination Management Plan has been updated in 2025 to reflect the changing Post Covid environment and to incorporate further stakeholder input into the plan.

VISION

By 2027, the Murray region is recognised as Australia's premier inland destination to experience waterways, abundant nature and rich culture.

OBJECTIVES

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

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

EXECUTIVE SUMMARY

The Murray River, its tributaries and other waterways are the heart of the Murray region and are the primary driver for visitation, supported by other natural assets including River Red Gum Forests, wetlands and bushlands.

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

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



6.2M visitors



\$2.5B expenditure

The visitor is at the heart of this Destination Management Plan. The Plan draws on an in-depth consumer research program which explored the expectations, needs and demand from current and future visitors from the Australian market.

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

EXECUTIVE SUMMARY

STRATEGIC PILLARS

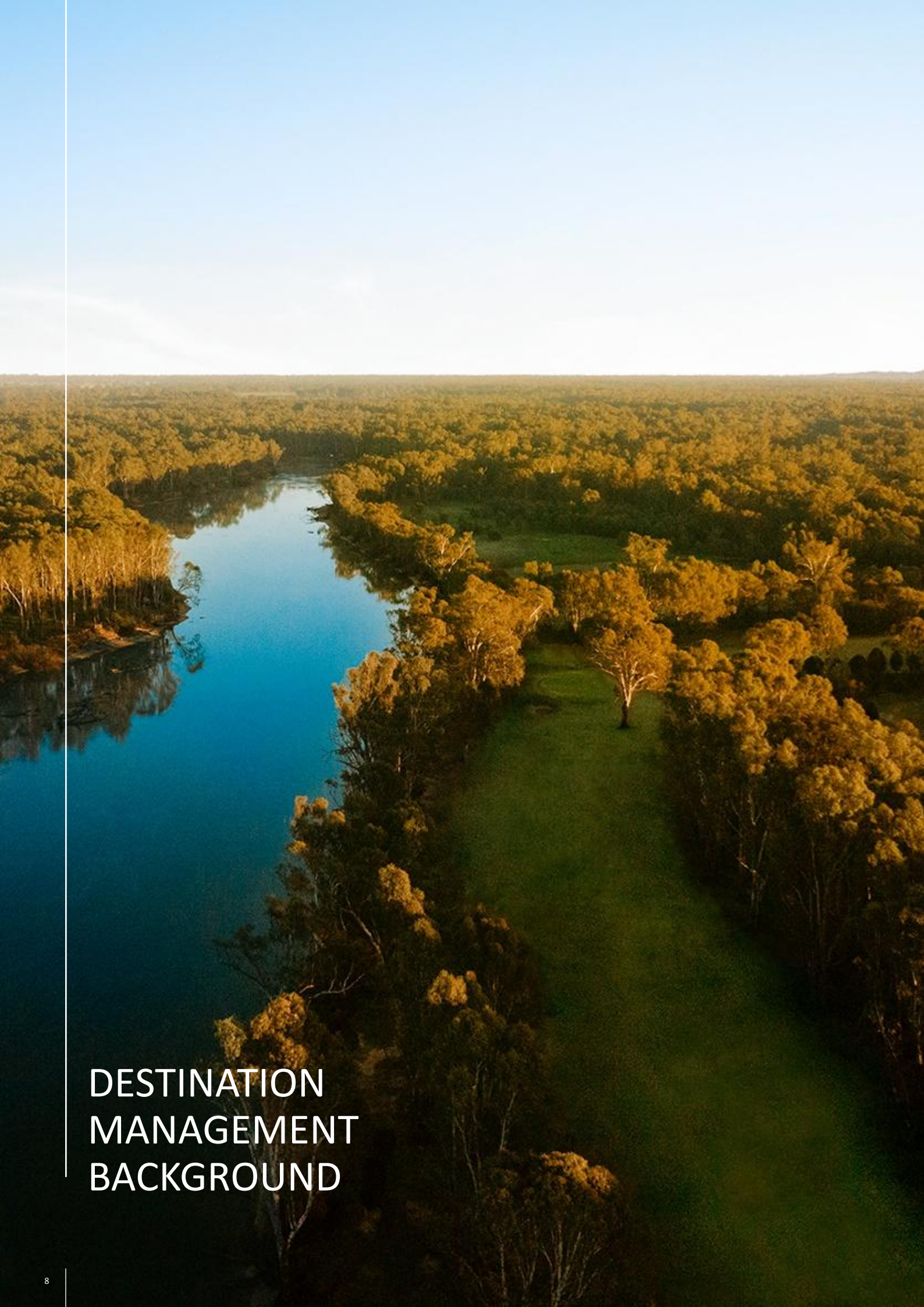
Six strategic pillars have been identified for the Destination Management Plan. These are the focus areas that will enable the Murray region to reach the above vision and objectives.

The themes/pillars identified respond to unique needs and opportunities for the Murray region, building on themes and priorities of the past Murray Region Destination Management Plan 2017. In addition, this aligns to the New South Wales Visitor Economy Strategy 2035, Visit Victoria 2030 Plan and Experience Victoria 2033 Plan.

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

PERFORMANCE TARGETS FOR THE MURRAY REGION

Economic Growth	Investment	Industry Development	Sustainability
- Increased spend per visitor. - Increased visitor length of stay. - Increased visitation, in particular holiday and leisure, family and luxury travellers. - Increased repeat visitation.	- Public and private sector investment in a diverse range of tourism products, infrastructure, experiences and accommodation. - Improved diversity of product, experience and accommodation offering.	- Public and private sector investment in First Nations tourism products and experiences, led by Traditional Owners. - Increased industry collaboration. - Improved cross border collaboration. - Improved industry performance and health.	Improved resilience to natural disasters and disruptive events.

An aerial photograph showing a wide, calm river with a vibrant blue-green hue. The river flows from the upper left towards the center of the frame. On both sides of the river, there is a dense forest of trees with golden-yellow foliage, suggesting an autumn setting. To the right of the river, there is a large, open grassy area or clearing. The sky above is a clear, pale blue. The overall scene is peaceful and scenic.

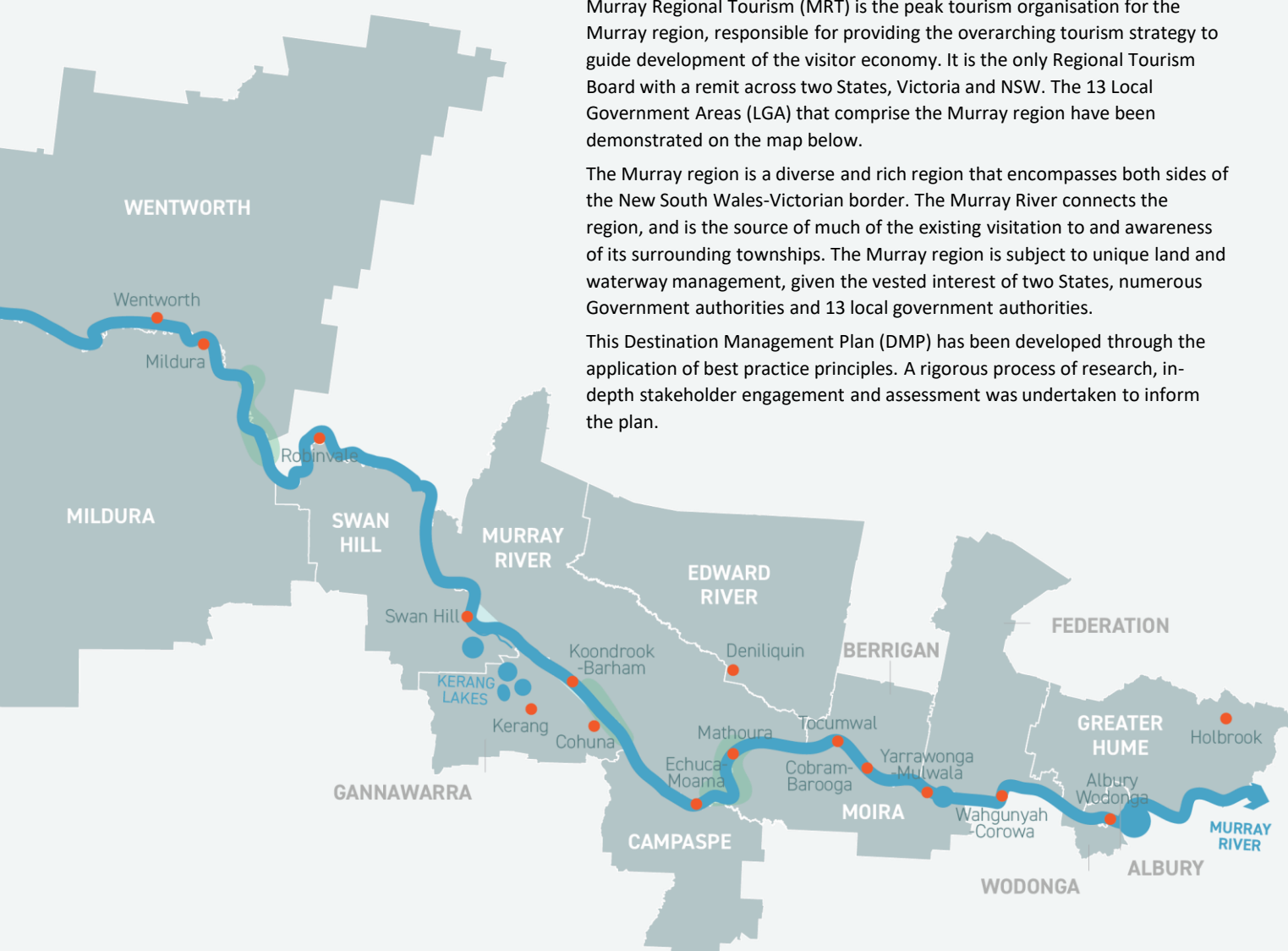
DESTINATION MANAGEMENT BACKGROUND

01

INTRODUCTION

Murray Regional Tourism has developed a Destination Management Plan in conjunction with our 13 Local Government partners and industry for the Murray region. Updated in 2025 to reflect post COVID-19 Pandemic conditions and stakeholder input, this has been developed as the primary blueprint to inform tourism development investment decisions across the Murray region.

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



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

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

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

02

MURRAY REGION TOURISM LANDSCAPE

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

The Murray River, its tributaries and other waterways are the heart of the Murray region and are the primary driver for visitation, supported by other natural assets including river red gum forests, wetlands and bushlands. These assets provide a unique, picturesque backdrop for the region, and generates a range of activities such as boating, water way cruising, walking and cycling, water sports, camping, 4WD driving and other outdoor and adventure pursuits.

MURRAY REGION TOURISM LANDSCAPE



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



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



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



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



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



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



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



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

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

DESTINATION MANAGEMENT

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

WHAT IS BEST PRACTICE?

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

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

THE 3 KEY ELEMENTS OF DESTINATION MANAGEMENT

PLACE	Defining the destination in the eyes of the visitor and communities of interest and understanding the visitor journey to and within the region.
PEOPLE	Cohesive governance and strong leadership, engaged industry and qualified and experienced labour force.
PRODUCT	Motivating products, quality infrastructure and experiences on offer that draw visitors and provide to visitor needs.

ROLE OF MRT IN DESTINATION MANAGEMENT

Visitor Economy Partnerships (VEPs) are independent, government recognised destination management organisations that lead tourism development and coordination across specific Victorian regions. Established in 2023, they have replaced what were formerly known as Regional Tourism Boards (RTBs).

The role of Visitor Economy Partnerships are to act as a key conduit in supporting local tourism businesses and services in building capability and providing them with marketing opportunities to amplify destination awareness*. They receive funding from State and Local Governments.

MRT is the Visitor Economy Partnership for the Murray region, which spans across NSW and Victoria. The cross-border organisation is jointly funded via its 13 stakeholder councils and two State agencies, including NSW and Victoria.

MRT works in collaboration with Local Government partners on both sides of the border to undertake regional planning, investment attraction, industry development activities and marketing.

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

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

*Visit Victoria.

DESTINATION MANAGEMENT

ALIGNMENT TO VISIT VICTORIA 2030 STRATEGY
(DEMAND SIDE PLAN)

Victoria's 2030 visitor economy strategy aims for \$53.4 billion through sustainable, inclusive growth, using the "Create, Convert, Connect" framework to drive demand, bookings, and global market reach. The plan leverages the state's strengths in food, nature, arts, and events, while prioritising collaboration, First Peoples leadership, and market-specific initiatives like aviation partnerships and regional dispersal. Success metrics include economic growth and enhanced brand sentiment, positioning Victoria's diverse offerings as "Every bit different" to international and domestic visitors.

ALIGNMENT TO EXPERIENCE VICTORIA 2033 STRATEGY
(SUPPLY SIDE PLAN)

Experience Victoria 2033 is a 10-year strategic roadmap aiming to grow the state's visitor economy to \$58 billion by 2033 through targeted supply-side investment and product development. The plan focuses on five core pillars: wellness, arts and culture, First Peoples-led experiences, food and drink, and nature to encourage longer stays and increased spending across regional and metropolitan Victoria. By prioritising infrastructure, workforce development, and sustainability, the strategy ensures the state remains a globally competitive, inclusive, and accessible destination.

Product Priority	Murray Region Alignment
First Peoples	Emerging Product Strength An emerging product strength and a major opportunity for the Murray region due to the large First Nations population in the region and a number significant cultural heritage sites.
Arts and culture	Emerging Product Strength An emerging product strength for the Murray region with continued investment in art galleries and other art and culture products and experiences.
Wellness	Emerging Product Strength An emerging product strength for the Murray region with the potential for wellness tourism opportunities yet to be realised in the region.
Nature	Existing Product Strength Strong existing alignment and a primary focus for the Murray region due to the number of significant natural-assets in the region.
Food and drink	Existing Product Strength Strong existing alignment and a continual primary focus for the Murray region to ensure products and experiences remain competitive with other regions.



ALIGNMENT TO THE NSW VISITOR ECONOMY STRATEGY 2035

The NSW Visitor Economy Strategy 2035 is a comprehensive 10-year roadmap designed to establish New South Wales as the premier global visitor destination by 2035. At its core is a "stretch goal" to boost annual visitor expenditure to \$91 billion, supported by the addition of 40,400 new accommodation rooms, 8.5 million extra airline seats, and 150,000 new jobs.

The strategy centres on "experience tourism," specifically highlighting First Nations culture, diverse natural landscapes, and world-class food and wine. Success is driven by five strategic pillars: making it easy for people to visit through improved infrastructure, attracting visitors through bold storytelling, driving growth via a nation-leading major events calendar, delivering high-quality immersive experiences, and leveraging real-time data for agile decision-making.

SUMMARY OF TOURISM DIRECTIONS FROM THE NSW VISITOR ECONOMY STRATEGY 2035

Make it easy for more people to visit.	Drive growth in the visitor economy by fostering strong partnerships, attracting investment and building a skilled workforce.
Focus on attracting visitors	Position Sydney and NSW as must-visit destinations by connecting visitors with compelling locations and experiences and igniting demand through rich storytelling.
Drive growth through events	Leverage and attract world-class entertainment, sport, cultural and business events to drive visitation, deliver economic, social and cultural benefits, stimulate regional growth and foster innovation in the knowledge economy
Focus on experiences	Position NSW as a global leader, attracting high-value travellers and driving repeat visitation through the growth and development of immersive, authentic travel and a strong events calendar.
Leverage data and insights	Build a data-driven, insight-led visitor economy that enables agile decision making, delivers enhanced experiences and fosters growth.

DESTINATION MANAGEMENT

THE MURRAY REGION’S DESTINATION LIFECYCLE

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

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

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

STAGES OF THE DESTINATION LIFECYCLE

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



GOVERNANCE

Murray Regional Tourism is a stakeholder-led, collaboration-focused organisation that promotes the visitor economy of the Murray region. We achieve this with industry stakeholders to develop and implement strategies that will sustainably increase visitation and economic activity in our region.

Murray Regional Tourism is committed to cross border collaboration and working with our funding partners and industry stakeholders to support long-term investment in the Murray visitor economy. Murray Regional Tourism adheres to a collaborative model of governance via a representative and skills-based board, ensuring effective decision making and sound financial management.

ROLES AND RESPONSIBILITIES

The table below outlines the governance structure for tourism across the Murray region and the responsibilities for each of the key organisations.

GOVERNANCE OVERVIEW

Tourism Australia	Tourism Australia is Australia's national tourism marketing organisation. Its job is to promote Australia as a destination for both leisure travel and business events.	• Destination marketing. • Industry support and engagement. • Industry training. • Funding streams, including Regional Events Fund. • Research
Visit Victoria	Primary tourism and events company for the State Government, involved in research, advocacy and domestic and international marketing. Visit Victoria is a key partner in promotion and strategic planning for the tourism sector. MRT should maintain a strong relationship to ensure alignment with Visit Victoria marketing initiatives.	• Destination marketing. • Industry support and engagement. • Industry training. • Product development. • Funding streams, including Regional Events Fund.
Destination NSW	Lead government agency for the NSW tourism and major events sectors. Major role in positioning NSW as one of the world's premier tourism events destinations, as well as achieving the NSW Government's goal of tripling visitation expenditure by 2030.	• Destination marketing. • Industry support and engagement. • Industry training. • Product development.
Victoria's Cross Border Commissioner	Victoria's Cross Border Commissioner works with residents, businesses and community organisations along Victoria's border to identify and advocate for change. The Cross Border Commissioner also works with the Office of the NSW Cross-Border Commissioner to ensure economic and community benefits for border towns.	• Advocacy. • Industry support.

GOVERNANCE

GOVERNANCE OVERVIEW

GOVERNANCE OVERVIEW

Office of the NSW Cross-Border Commissioner	The Office of the Cross Border Commissioner advocates and represents cross border communities and businesses. The NSW Cross-Border Commissioner works alongside local, state and federal bodies to ensure cross-border communities and businesses are not negatively impacted by two sets of legislations and policies.	• Advocacy. • Industry support.
Department of Jobs, Skills, Industry and Regions	The Department of Jobs, Skills, Industry and Regions, within the Victorian Government, is focused on creating jobs, supporting businesses and industries and building communities and regions to drive a strong and resilient economy.	• Business and industry support. • Numerous funding streams. • Economic development. • Advocacy.
Regional Development Victoria	Regional Development Victoria (RDV) is the lead state government agency responsible for rural and regional economic development in Victoria. RDV works to enable businesses to invest, consolidate and grow jobs, strengthen regional economies and enrich Victoria's regional cities and towns.	• Numerous funding streams, including Regional Jobs and Infrastructure Fund. • Business investment support. • Economic development. • Advocacy.
Visit Victoria	Visit Victoria's primary role is to act as the State's Destination Marketing Organisation, mandated to drive demand for Victorian tourism and events to maximise visitor numbers and economic value.	• Numerous funding streams. • Research and insights. • Strategy. • Marketing. • Events support. • Policy and strategy advice.
Department of Regional NSW	The Department of Regional NSW is a central agency for regional issues, building regional economies and communities, managing the use of regional land, and ensuring that government investment into regional NSW is fair and delivers positive outcomes for local communities and businesses.	• Regional economic development Plans. • Regional event funding. • Tourism infrastructure funding. • Regional investment support. • Regional strategic planning.
Murray Regional Tourism	The Regional Tourism Board and peak tourism organisation for the Murray region in NSW and Victoria. MRT is the lead cross border entity for strategic planning in the Murray region and collaborates with government and industry partners to undertake planning, marketing, product, industry and infrastructure development, and advocacy.	• Advocacy. • Destination marketing. • Industry support and engagement. • Product development. • Investment attraction and facilitation.
Destination Riverina Murray	DRM is one of seven Destination Networks (DNs) established by the NSW state government to represent the visitor economy in regional NSW. Its principal role is to represent and coordinate the growth and development of the NSW Riverina Murray region visitor economy.	• Advocacy. • Industry training. • Product development. • Industry support and engagement. • Investment attraction and facilitation.
Local Government	Councils act as enabler for the visitor economy by providing the foundations, including strategic planning, infrastructure services, assistance in product development, investment attraction, and support to the local industry.	• Visitor services. • Destination marketing. • Investment attraction/facilitation. • Industry training. • Product development.
Industry Associations	Industry associations are representative bodies that bring together like-minded people and organisations that are connected by industry type or geographical area. The role of industry associations can differ, however they generally include providing ongoing support to businesses through regular industry updates, as well as networking and professional development opportunities. Major industry associations include the Victorian Tourism Industry Council (VTIC) and Business NSW at the State level, with Local Tourism Associations (LTA) operating at a local level.	• Visitor services. • Events facilitation and support. • Destination marketing. • Industry networking and support. • Industry representation.

DESTINATION SNAPSHOT

2024 VISITATION OVERVIEW

In 2024, the Murray region welcomed over 6.2 million visitors, comprising 2.9 million-day trips (47%), 3.3 million overnight stays (52%), and 69,000 international visitors (1%).

Albury-Wodonga and Yarrawonga-Mulwala are the leading destinations on the Murray, attracting 1.9 million and 1.3 million visitors respectively. Other significant contributors included Echuca Moama (1.2 million visitors), and Mildura Wentworth (909,000 visitors), while smaller regions, such as Edward River recorded less than 500,000 visitors. These patterns highlight opportunities to encourage greater dispersal to underrepresented LGAs and to leverage high-performing destinations for regional growth.

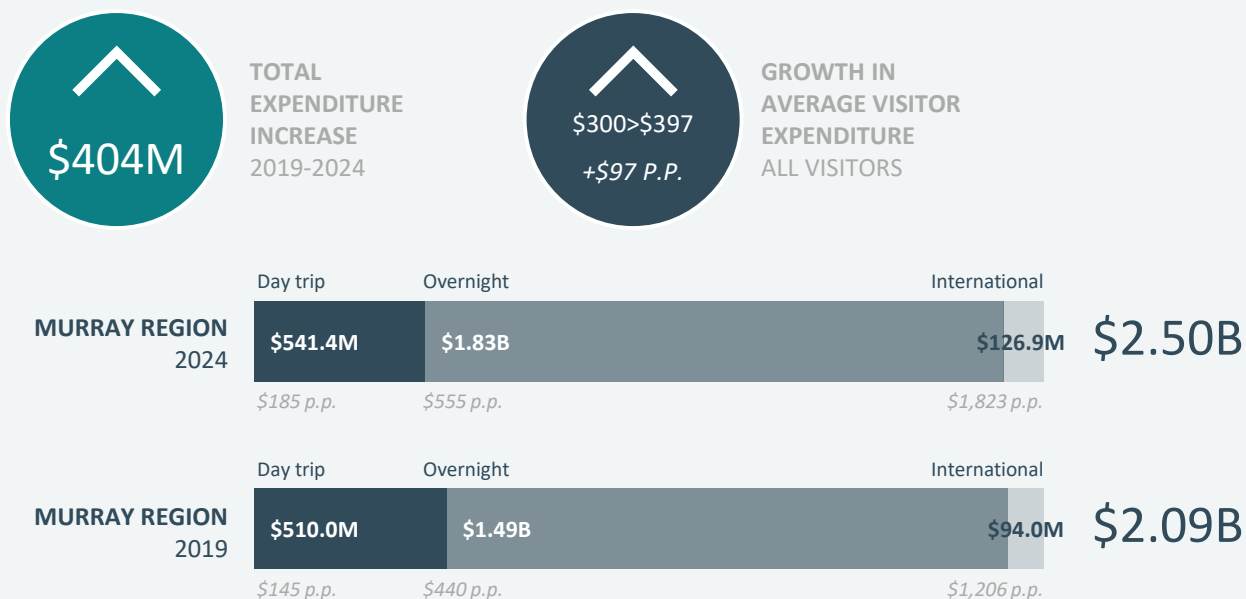
Visitor expenditure in the Murray Region increased by \$404 million from 2019 to 2024, reflecting an average annual growth rate 3.57% per year in visitor expenditure.

Average spend per visitor has increased from \$300 per visitor in 2019 to \$397 per visitor in 2024, an increase of \$97 per visitors over five years. This growth demonstrates increased engagement with products and experiences, and additional spend on accommodation.

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

This section draws on Tourism Research Australia (TRA), the widely accepted Australian Government data source tracking visitation across Australia. Unless specified otherwise, this data has been presented for the region for the 2024 calendar year.

EXPENDITURE TRENDS 2019-2024



Source: Murray Region Snapshot YE December 2024 (Murray Regional Tourism).

DESTINATION SNAPSHOT

2024 VISITATION OVERVIEW



DESTINATION SNAPSHOT

DOMESTIC VISITOR PROFILE

Day Trip Visitors

Day trip visitation to the Murray region is primarily driven by Victorians, who account for 65% of this market. Most of these visitors come from regional Victoria (81%), with a smaller share from metropolitan Melbourne (19%), reflecting the region's distance from the city. NSW visitors make up the remaining 35%, and the vast majority of visitors (93%) are from regional NSW.

The main purpose of day trips to the Murray region is holiday and leisure (43%), followed by visiting friends and relatives (VFR) (27%). This strong VFR segment presents an opportunity to engage locals as ambassadors to promote attractions and experiences. Business and other reasons account for 30% of visits, highlighting the region's role in supporting rural communities for employment, medical, and educational needs.

Seasonal patterns show that visitation peaks in winter (29%) and summer (25%), likely driven by school holidays and VFR travel.

Social activities, such as dining out (37%), visiting friends and relatives (29%), shopping (17%) and visiting pubs and clubs (15%), are among the most popular activities engaged in by visitors to the Murray region.

Engagement with the natural assets of the Murray region and participation in nature-based activities is comparatively low. There is opportunity to increase engagement with the Murray region's natural landscape through the development of new tourism products and experiences.

Overnight Visitors

Overnight visitation to the Murray region is dominated by Victorians, who account for 68% of the market, with most coming from metropolitan areas of Victoria (55%). NSW visitors represent 20%, the majority from regional NSW (73%), while the remaining 12% come from other states. There is strong potential to grow interstate visitation, particularly from South Australia and Queensland, leveraging destinations such as Mildura-Wentworth and Albury Wodonga that offer passenger flight services.

The main purpose of overnight trips is holiday and leisure (43%), followed by visiting friends and relatives (VFR), which accounts for 34%. Business and other reasons make up 24% of visits, reflecting the region's role in supporting rural communities.

Seasonal patterns show visitation is relatively balanced across autumn (28%), spring (27%), and summer (26%), with winter being the lowest at 20%.

Commercial accommodation accounts for 55% of accommodation stayed in by visitors to the Murray region. This is mainly Hotel/Motor Inn (33%) and Holiday Park (16%) accommodation, which reflects the region's current accommodation supply.

A high proportion of overnight visitors are staying in private accommodation, mostly due to the large VFR market staying at a friends or relatives property (31%), as well as visitors staying at informal camping grounds (11%).

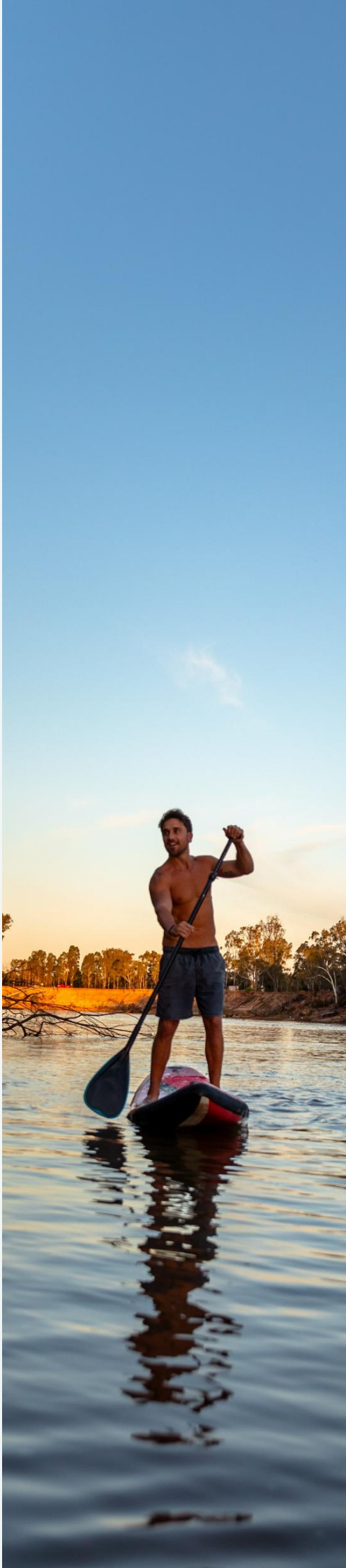
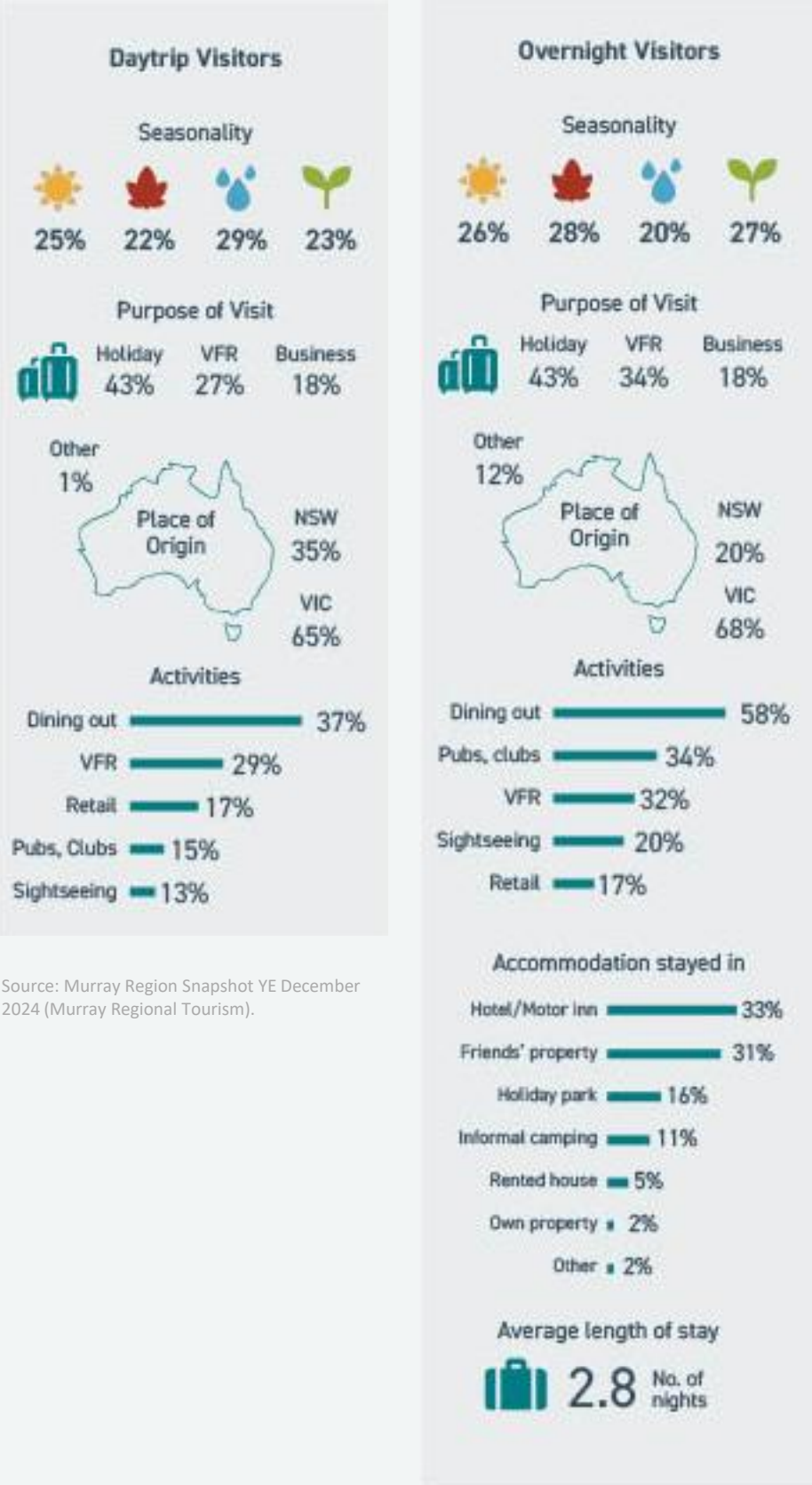
On average, overnight visitors spend approximately 2.8 nights in the Murray region. There is opportunity to encourage growth in length of stay by investing in motivating products and experiences.

Similar to the patterns of day trip visitors, overnight visitors are primarily engaging in social activities, such as dining out (58%), visiting pubs and clubs (34%) and visiting friends and relatives (32%) and shopping (17%).

DESTINATION SNAPSHOT

DOMESTIC VISITOR PROFILE

DOMESTIC VISITOR PROFILE



DESTINATION SNAPSHOT

FORCES AT PLAY

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

COVID-19

Travel restrictions due to the COVID-19 pandemic caused a 67% decline in domestic overnight trips between June 2019 / 2020. The visitor economy had yet to recover as of June 2021, with domestic overnight trips still 19% lower than June 2019*. The return of travel has been concentrated in the Holiday and VFR segments, in particular from short haul source markets, with a lower level of business travel.

Consumer's inability and hesitancy to travel internationally has led to a younger and more diverse domestic visitor market, who have time to travel longer distances and who seek exciting and contemporary tourism products and experiences**.

The rise in remote working also provides visitors with more flexibility to travel for more nights and not be constrained by annual leave or public holidays. The ability of destinations to capture these markets will depend on the availability of high speed internet and accommodation with appropriate business facilities.

Culturally and linguistically diverse market exploration of regional Victoria

The culturally and linguistically diverse (CALD) market is a key growing segment for tourism in Australia. 30% of Victorians are born overseas and there has been a substantial increase in Asian and sub continental origin residents particularly in Melbourne and Sydney over the past two decades.

Whilst these groups are diverse in ethnicity and language, many of these have commonalities in their desire to explore Victoria and NSW and have passive nature experiences. It is important that Victorian and NSW destinations understand the needs of this market and support growth in this market segment.

Whilst the CALD market is largely a lower yielding segment, over time this is likely to change and the connections made during exploration of Victoria and NSW will lead to future long term repeat visitors.

Shift towards nature-based visitation

Nature based tourism has long been a motivating driver for visitors to explore Victoria and NSW. Growth trends in experiencing nature have outgrown every other activity consumption in Victoria and NSW in the past ten years and since COVID restrictions this has been exacerbated and people's desire to be amongst nature has increased substantially.

The Victorian and NSW Government have invested heavily in nature-based tourism, particularly in tracks and trails, which supports walking and cycle tourism.

The Murray region is well placed to leverage from the growing consumption of nature-based tourism through strengthening some of its icon National parks such as Mungo, Barmah and Gunbower, and through the delivery and promotion of the Murray River Adventure Trail.

Growth in Airbnb

Growth in the use of self-contained accommodation, such as Airbnb and Stayz, has outpaced investment in new hotels and motels. In 2017, the number of nights stayed in Airbnb and Stayz in Australia grew 9.6% whilst conventional hotels grew only 5.6%***.

42% of the Australian market would prefer to stay in self-contained accommodation (Airbnb and Stayz) during a potential future trip to the Murray region****. Airbnb accommodation provides privacy for guests, who often do not interact with the accommodation operator during their stay. Airbnb is highly suited to families, offering entire homes with kitchen and laundry facilities, allowing visitors to be self-sufficient during their stay. Additionally, compared to other accommodation types, Airbnb accommodation has come to be viewed as a COVID safe alternative.

The Victorian government has introduced a Short Stay Levy (SSL) of 7.5% on total booking fees for short-term accommodation bookings of less than 28 consecutive days, effective from 1 January 2025. It is difficult to know what impact this will have in the Murray Region, however is partly being used as a way to encourage property owners to move short term housing into the permeant rental market thereby supporting worker housing.

Holistic wellness

Holistic wellness is an approach to physical, mental, and spiritual health that considers the whole person in the pursuit of health, happiness, and spiritual wellness.

There is increased interest in Australians seeking holistic wellness, particularly since the impact of COVID 19 pandemic on mental health.

Visiting the Murray region for some is considered important for physical, mental and spiritual health. This theme can be explored further in the DMP.

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

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

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

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

DESTINATION SNAPSHOT

FORCES AT PLAY

Rise in remote-working and growth in tree-change

COVID 19 restrictions have increased the opportunity for workers to have flexibility and 'working' holidays. This is significant as it increases the potential for mid-week travel to the Murray region's destinations. High quality internet and provision of WIFI in accommodation is critical for supporting this opportunity.

In addition to this COVID has led to an increase in residents relocating from Australian Cities to regional destinations. Tree change brings new residents and ideas to destinations and whilst it may have a negative effect in terms of increasing property values, it is positive in terms of supporting population growth in locations that may be suffering decline and delivering a new workforce and business owners to regions.

Growth in the experience economy

The Experience Economy is the sale of memorable experiences to customers.

Key target markets in Australia such as Lifestyle Leaders have a much greater focus on the experience of destination and are willing to spend on experience over product.

Increased consumption of experiences presents an opportunity for the Murray region to add substantial yield from visitors.

The tourism industry needs to understand the importance of visitor experience consumption and the impact this has on motivating higher yield visitors to a region and providing a positive and satisfying experience.

Caravan, camping and nature-based

Given the shift towards more local, frequent and affordable domestic holidays, caravan and camping travel has become attractive to a more diverse group of visitors, beyond the traditional grey nomad road tripper market segment. As a result, the number of recreational vehicles rose by 16.5% in June 2020, with Australian caravan production reaching a 30 year high in 2021*.

Nature-based accommodation has also become increasingly popular. This accommodation type is a more 'COVID-safe' option and represents an alternative to traditional accommodation for those seeking a more unique experience.

*Caravan Industry Association Australia, 2021.



DESTINATION SNAPSHOT

PRODUCT STRENGTHS AND GAP ANALYSIS

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

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

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

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

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

MURRAY REGION KEY PRODUCT STRENGTHS, GAPS AND OPPORTUNITIES

Product	2017 DMP	2023 DMP	Overview	Key Gaps & Opportunities
Water Sports	Primary	Primary	Water sports including water skiing and boating continue to be a primary strength of the Murray region. Market research shows that the Murray region is Victoria's number 1 inland water destination in terms of awareness and preference for visit.	Infrastructure to support river access is needed. There also remains opportunities for secondary destinations and the Murray region's lakes such as Lake Hume, Lake Boga and Kerang Lakes to strengthen as water sports hubs. Increasing awareness of water sports destinations also presents opportunities for growth.
Food, Wine and Produce	Primary	Primary	The Murray region remains a major food producing region in Australia. The primary visitor nodes in the Murray region generally have a strong dining and food presence.	There remain gaps in farm gate and access to local produce in the Murray region. Food quality and provision in secondary destinations needs improvement to meet market need. There also remains opportunity in ferments and other beverage products.
Fishing	Primary	Primary	Fishing is a key motivator of travel to the Murray region's lakes and waterways. Murray Cod is iconic and has broad appeal domestically and internationally for fisherman.	Improvement to water access will support this sector. In addition, opportunity to hire watercraft and provision of fishing tours in various locations will strengthen this sector.
Houseboats / River Cruises	Primary	Primary	The Murray region is unique for its houseboats and river cruising. Destinations such as Echuca, Yarrawonga and Mildura are well developed in this regard.	The recent Murray Region Cruising Strategy highlights a range of gaps and opportunities for this sector. Investment in mooring infrastructure and wharves is needed to support growth in river and lake cruising. There are opportunities for multi day cruises and themed cruises across Murray region destinations.
Golf	Primary	Primary	The Murray region is one of Australia's leading golf destinations. The quality of courses and supporting club amenities present a strong proposition for golf groups.	There is opportunity to continue packaging of golf product and the need for further investment in facilities at golf courses.

DESTINATION SNAPSHOT

PRODUCT STRENGTHS AND GAP ANALYSIS

MURRAY REGION KEY PRODUCT STRENGTHS, GAPS AND OPPORTUNITIES

Product	2017 DMP	2023 DMP	Overview	Key Gaps & Opportunities
Festivals and Events	Primary	Primary	The Murray region hosts a number of signature events that draw in thousands of visitors.	There remains opportunity to grow the events calendar, particularly at secondary destinations. Arts, music and culture events present opportunity for attracting off peak visitation to the region.
History and Heritage	Primary	Primary	The Murray region has extensive post settlement heritage as a result of the transport role the river played in Australia's colonial development. The Port of Echuca, Pioneer Settlement and Bonegilla Migrant Experience are key attractions that appeal to visitors interested in post settlement history. New attractions such as the Depot in Deni are examples of growth in this sector.	There is opportunity to improve heritage streetscapes, reutilise heritage buildings for tourism purposes and also see continued investment in the Murray region's heritage precincts such as the Port of Echuca. Focus on utilising heritage as a backdrop which can be activated should be a focus.
Nature-based	Secondary	Primary	In the previous DMP nature-based was identified as a secondary strength, however with increased activation through waterway cruises, investment in eco accommodation and new eco tours in the region, nature-based tourism can be seen as a primary strength for the Murray region.	There remains opportunity for continued strengthening of nature-based precincts in the Murray region. Working closely with Traditional Owners will lead to the establishment of leading nature-based destinations. Mungo, Gunbower and Barmah present opportunities to be icons of the Murray region. There is also opportunity to further enhance Pental Island, Swan Hill as a nature-based destination.
Business Events	Secondary	Secondary	Business events prior to the impact of COVID were important for driving mid-week visitation in primary Murray region destinations.	Business events have been impacted significantly by COVID and there is a need for a coordinated effort to grow this sector. Investment in quality and contemporary events facilities in Albury, Swan Hill, Echuca and Mildura is needed to strengthen this sector.
First Nations	Emerging	Secondary	First Nations tourism was considered as emerging in the previous DMP, however there has been significant growth in this sector in many parts of the Murray region. An example is the role of the Yorta Yorta Nation Aboriginal Corporation in developing tourism products and tours at Barmah and the Bangerang Aboriginal Corporation in the development of Bullanginya Dreaming, Barooga.	This is considered a major opportunity for the Murray region. The region has a large First Nations population and many significant cultural heritage sites. A First Nations tourism plan should be considered which considers capacity building and establishment of visitor economy infrastructure and product for this sector.
Arts and Culture	Emerging	Secondary	Arts and culture have shifted to a secondary strength. Investment in destinations such as Albury Wodonga, Echuca, Swan Hill and Mildura provides a strong proposition for visitors.	Continued investment in art galleries and strengthening of grass roots arts and cultural experiences present opportunities for the region.

POSITIONING THE REGION

The potential for growth across the Murray region over the next five years is based on extensive research and analysis. Key inputs include the Murray Region Consumer Research Project, which involved a survey of 2,000 Australians, a survey of over 1,000 past visitors, and four focus groups with past and potential visitors conducted in 2022. Additional insights were drawn from accommodation demand modelling undertaken by Urban Enterprise through the Murray Region Accommodation Diversification Gap Analysis Project, as well as Urban Enterprise's modelling of future demand for the region.

DESTINATION AWARENESS

Awareness Of Murray Region Destinations

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

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

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

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

AWARENESS OF MURRAY REGION DESTINATIONS

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

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

POSITIONING THE REGION

DESTINATION AWARENESS

Awareness Of Nature-based Assets

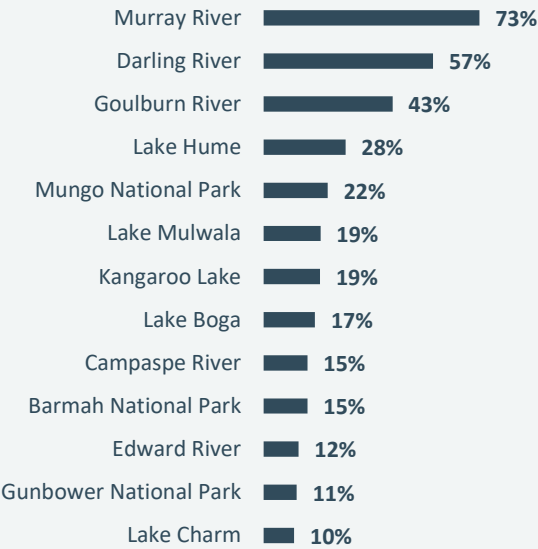
In comparison to other waterways within the Murray region, the Murray River has the highest levels of awareness within a representative sample of the Australian market (73% of the Australian population).

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

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

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

AWARENESS OF NATURE-BASED ASSETS



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



AUSTRALIAN MARKET APPEAL OF THE EXISTING MURRAY REGION OFFER

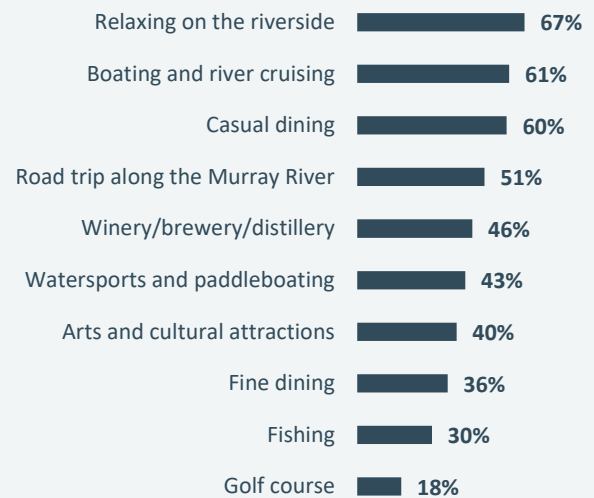
The Australian market were shown a series of images of key experiences available across the Murray region, and asked to select the images that appeal to them as part of a potential future holiday experience.

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

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

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

MARKET APPEAL OF MURRAY REGION EXPERIENCES



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

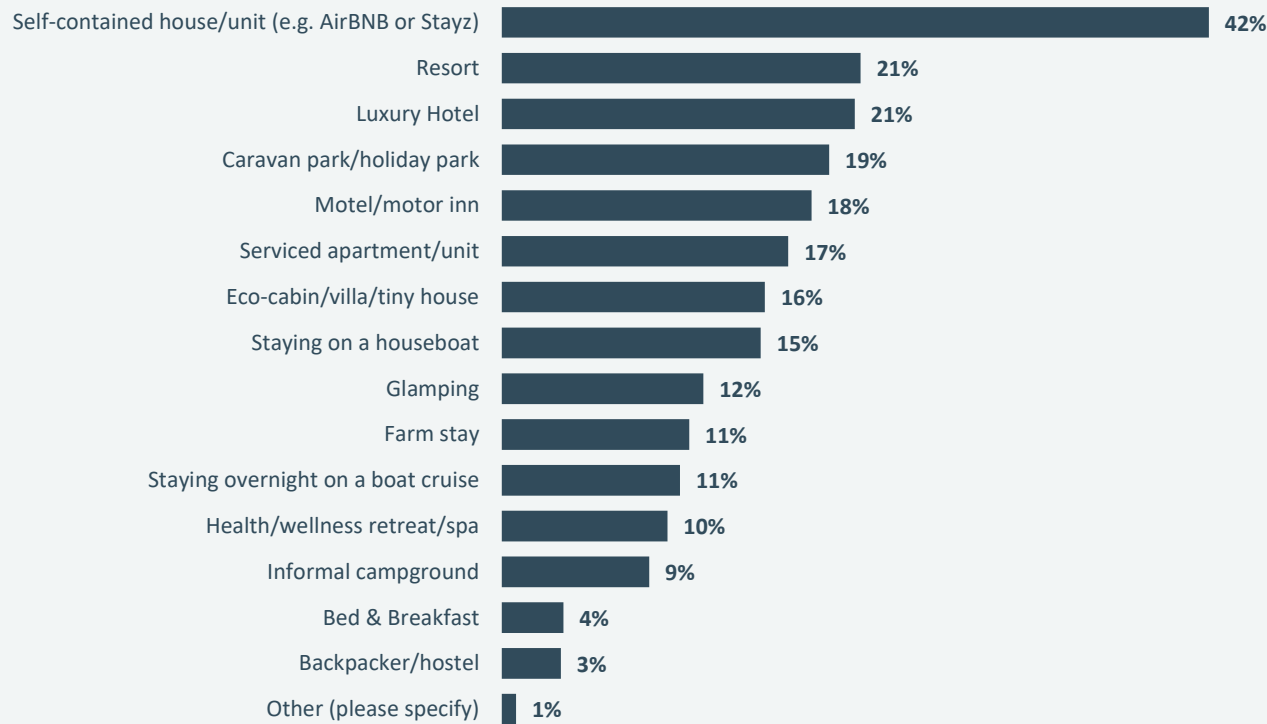
POSITIONING THE REGION

MARKET DEMAND FOR ACCOMMODATION

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

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

MARKET DEMAND FOR ACCOMMODATION



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

Projected Future Accommodation Needs, 2022-2032

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

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

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

POSITIONING THE REGION

KEY INVESTMENT TARGETS

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

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

INVESTMENT TARGET GUIDE

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

POSITIONING THE REGION

MURRAY REGION TARGET MARKETS

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

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

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

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

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

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

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

Visit Victoria's Target Market Segments

Visit Victoria's primary target markets include Lifestyle Leaders and High-Value Travellers market segments. It is important to ensure alignment to Victoria's primary target markets

Victoria's Lifestyle Leaders market segment is the primary domestic target market. This audience is looking for unique and immersive experiences, as well as quality food, wine and local produce. There is strong alignment to the Murray regions' Explorer and Discoverer market and moderate alignment to the Road Trip market.

The High-Value Travellers market are the primary international target market and already have a strong preference to visit Australia. This market is seeking authentic nature-based getaways and high-quality food and wine experiences. This target market is strongly aligned to the Murray region's Luxury Traveller market segment.

Tourism Australia's Target Audience

Tourism Australia identifies its target audience as High Yield Traveller. Similar to Visit Victoria's High-Value Traveller, the High Yield Traveller travels overseas on a regular basis with consideration or intention to visit Australia. The key drivers when choosing a holiday destination for this audience include food and wine, aquatic and coastal locations, nature and wildlife experiences.

Tourism Australia's High Yield Traveller is strongly aligned to the Murray region's Luxury Traveller market segment.



POSITIONING THE REGION

MURRAY REGION TARGET MARKETS

MURRAY REGION MARKET SEGMENTS

Proportion of Murray Region Target Market	Murray Habituals 38% 1.93 Million	Back to Basics 8% 0.43 Million	Road Trip 8% 0.40 Million	Explorer & Discoverer 35% 1.78 Million	Luxury Travellers 10% 0.52 Million
					
Overview	The traditional Murray region visitor who travels to the Murray region at least once every two years – the Murray's biggest advocate.	The simple traveller, the free spirit - escaping to nature to press pause on real life, spend time with loved ones, and hit reset.	Inspired by the freedom of a road trip, this market wants to explore the country, see new destinations and escape the city.	Socially conscious and adventurous travellers, open to travelling to new destinations and seeking new, unique experiences.	With a holiday mindset of indulgence, the luxury traveller seeks relaxation achieved through high quality experiences.
Who they are	- All ages and travel groups. - Large friend/relative group travel. - Mostly VIC (51%) and NSW (26%). - Self-sufficient travellers. - Stay for long trips during peak periods.	- Mostly 40-60 years old without children or with adult children. - Preference for longer stays at any time of year (49%).	- Mostly NSW (31%) and VIC (22%), high proportion born overseas. - Take longer trips less frequently. - Young couples, friends, families with older children, grey nomads.	- Young families and singles, mostly aged 18-40 years old. - Middle income earners. - Travel on weekends and more frequently throughout the year.	- Mostly older travellers, predominately adult couples. - Higher income. - Likely to travel midweek or any time of year.
Alignment to Visit Victoria's target market segments			 Lifestyle Leaders	  Lifestyle Leaders	  High-Value Travellers
 No alignment  Moderate alignment   Strong alignment					

POSITIONING THE REGION

COMPETITIVE POSITIONING

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

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

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

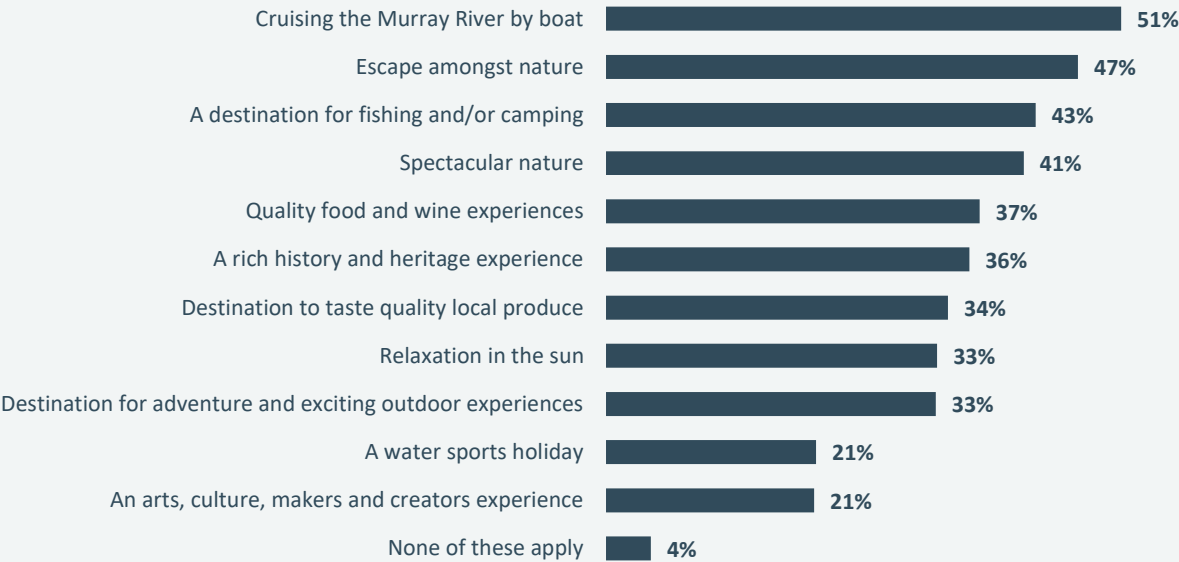
The Murray region needs to own waterway cruising and waterway experiences. Focusing on the ease and luxury of waterway experiences is a unique point of difference for the Murray region. Other regions own wine, coastal experiences, snow or cycling. They have used these competitive strengths to grow awareness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

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

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

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

DEMAND FOR MURRAY REGION EXPERIENCES AND EXPECTATIONS OF VISITORS



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

POSITIONING THE REGION

THE MURRAY BRAND

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

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

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

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

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

Renewed branding should be explored to ensure the region appears contemporary and innovative in a competitive domestic tourism environment.

Visit Victoria recently released their Destination Victoria Brand Strategy Playbook, a state-wide brand strategy which includes regional sub-brands setting the foundation for all communication activities by Visit Victoria. The Murray region sub-brand framework articulates Visit Victoria's positioning of the Murray region. This includes a sub-brand promise for the region, "enrich every moment with soulful river journeys".

In addition, the Murray Region is preparing directions for marketing in its 3-year 2023-2026 Strategic Marketing Plan (in development).

Adhering to guidelines set out in both documents should be taken into account when considering a brand refresh, as should consideration of NSW brand guidelines, for the Murray region.

CURRENT MURRAY REGION BRAND AND LOGO



CURRENT MURRAY REGION PERSONA

Our Essence:

Legendary River Stories Worth Sharing

Our Voice:

The Charismatic Storyteller

Our Tone:

Authentic › Emotive › Inspiring › Adventurous › Energised › Connected

Our Personality:

Open-handed

Welcoming hospitality that is heartfelt and honest.

Resilient

Hardworking locals delivering remarkable experiences.

Intrepid

A sense of adventure and discovery.

Balanced

A land of contrasts, cities straddle ancient moonscapes.

Our Values:

Candour

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

Prosperity

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

Sharing

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

POSITIONING THE REGION

FORECAST MURRAY REGION GROWTH

Urban Enterprise has forecast visitation for the Murray region based on Tourism Research Australia data for the 2024 calendar year.

The projections presented in the figure below apply the following growth rates for domestic daytrip, domestic overnight and international visitors to the Murray Region based on Murray Region historic visitation, projected increase in the Australian population and visitor projections sourced from Tourism Research Australia.

- Domestic daytrip visitors - 2.4% per annum
- Domestic overnight visitors - 2.7% per annum
- International visitors - 2.3% per annum

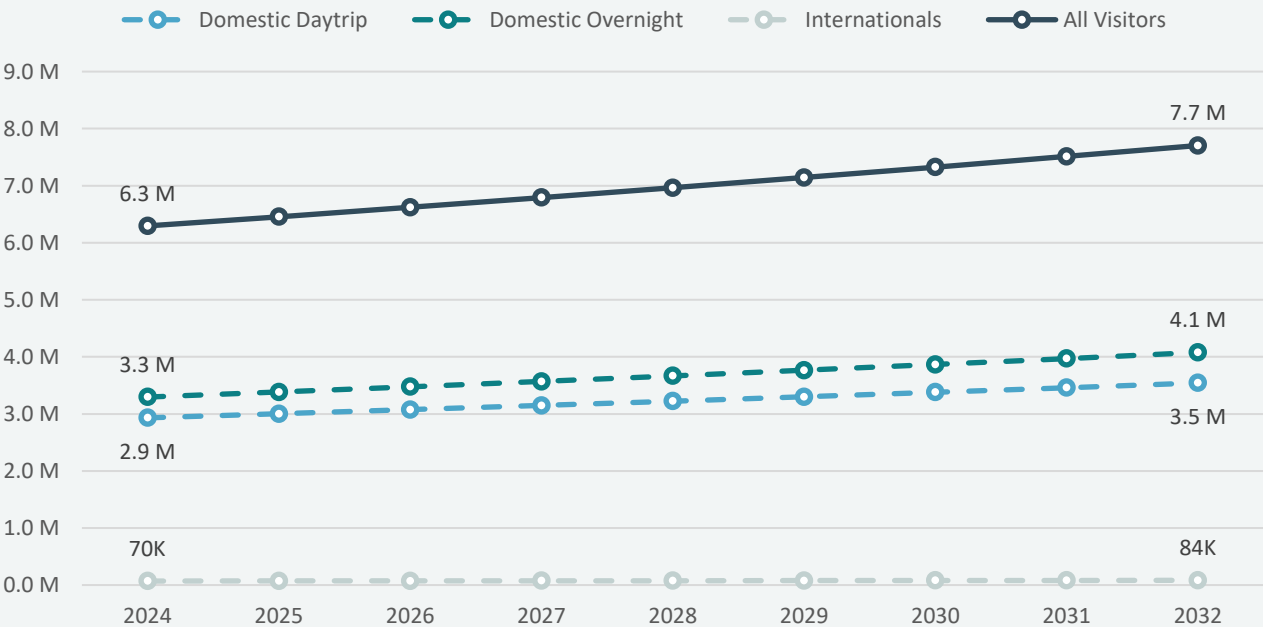
There is a need to focus growth on destinations that have experienced low visitation growth, by encouraging visitor dispersal throughout the region and marketing new visitor destinations.

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

Using these projections, visitation to the Murray Region is forecast to increase from 6.3 million visitors in 2024 to 7.7 million visitors in 2032.

Previous figures presented in the DMP released in 2023 utilised pre-COVID trends, overstating estimates. The forecasts presented below represent growth post COVID including utilised the latest published data for 2024.

FORECAST VISITATION FOR THE MURRAY REGION



An aerial, high-angle photograph of a boat, possibly a ferry or tugboat, moving through dark green water. The boat is oriented diagonally from the top center towards the bottom right. A large, thick, white plume of smoke or steam billows from the deck area, partially obscuring the boat's structure. The boat has a yellowish-brown upper hull and a dark lower hull. A small flag is visible at the bow. Several people can be seen on the deck. The overall lighting is dramatic, with strong highlights on the white plume and the boat's upper surfaces.

DESTINATION MANAGEMENT FRAMEWORK

VISION

By 2027, the Murray region is recognised as Australia's premier inland destination to experience waterways, abundant nature and rich culture.

OBJECTIVES

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

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

STRATEGIC PILLARS

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

The themes/pillars identified respond to unique needs and opportunities for the Murray region, building on themes and priorities of the past Murray Region Destination Management Plan 2017. In addition, this aligns to the New South Wales Visitor Economy Plan 2030 and Victorian Masterplan Directions Paper.

MURRAY REGION DESTINATION MANAGEMENT PLAN STRATEGIC PILLARS

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

PRIORITISATION FRAMEWORK

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

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

The following provides a guide for interpreting the Regional Priority Projects for the Murray region.

Assessment Criteria

A set of six assessment criteria were developed to identify priority projects for the Murray region DMP. These include:

- 1. **Perceptions.** Positively influence the perception of the Murray region as a significant tourism destination.
- 2. **Visitation and Yield.** Increase visitation and expenditure in the region.
- 3. **Sustainability.** Have a high probability of implementation and be sustainable over the long term.
- 4. **Further Development.** Have flow-on benefits that will lead to other development opportunities.
- 5. **Dispersal.** Draw visitors outside of peak periods, and/or increases visitor dispersal throughout the region.
- 6. **Target Markets.** Align to key target market segments including the Murray region’s Explorer and Discoverer and Luxury Travellers market segments and Visit Victoria’s Lifestyle Leaders and High Value Travellers market segments.

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

Priority

The priority level for each of the regional priority projects have been identified by determining their level of importance, logical staging, as well as which actions can be achieved relatively quickly. The following priority levels have been used:

Short-term within 1 year	Medium-term within 1-3 years
Ongoing	

Key Partners

Key partners have been identified for each of the regional priority projects. Current roles and responsibilities of these stakeholders are identified in the Governance section of this document.

Next Steps

The identified next steps are a suggestion to enable stakeholders to take forward the regional priority projects. The next steps are to be used as a guide and will be informed by local resourcing and priorities.

Other Projects (not specified in this DMP)

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

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

Destination and locality specific priority projects for the Murray region can be found in Local Area Plans for Murray region destinations.

PRIORITY PROJECTS

OVERVIEW

SUMMARY OF PRIORITY PROJECTS

Activate Waterways	Invest in Icons	Create Vibrant Destinations
- Facilitate Cruising Investment Experiences - Water Access Infrastructure - Paddlesports Hub - Waterfront Activations - Waterway Regulatory Advocacy - Supporting Cruising Industry Development	- Murray River Adventure Trail Delivery - Murray Esplanade and Port of Echuca Masterplan Refresh and Implementation - Mungo National Park Tourism Investment Masterplan and Business Case - Gunbower National Park Investment Masterplan and Business Case - Albury Wodonga Cultural Destination - Murray Water Theme Park	- Murray Region Small Towns Streetscape and Activity Centre Enhancements Project - Night-time Activation - Murray Region Destinations Gateway Project - Destination Food and Drink Development - Revitalising Swan Hill CBD - Arts and Culture Development
Elevate First Nations Experience	Drive Demand	Build Industry Capacity and Facilitate Growth
- Murray Region First Nations Experience Development Plan and Promotion - Barmah First Nations Tourism Masterplan - Lake of Lights, Lake Mulwala - Cultural Centre, Powerhouse Precinct, Mildura Riverfront	- Invest in World Class Motivational Visitor Accommodation - Existing Accommodation Refurbishment - Motels and Holiday Parks - Murray Region Brand Review and Refresh - Murray Region Online Bookable Product and Packaging - Murray Region Drive Tourism Strategy and Implementation - Murray Region Signature Events and Infrastructure Strategy - International Market Development Strategy - Murray River Festival	- Regional Workforce Pathways and Promotion Program, and Skills Development Plan - Transport and Infrastructure Enhancement Advocacy - Murray Regional Tourism Industry Leadership Program - Murray Region Local Ambassador Project - Visitor Information Services Review and Delivery - Cross Border Research

PRIORITY PROJECTS

PILLAR 1: ACTIVE WATERWAYS

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

The overwhelming key driver for holiday leisure visitors to the Murray region relates to experiencing the Murray River, lakes and tributary rivers. Whether it's active experiences on the region's waterways such as water-skiing or passive experiences such as cruising and swimming, it is critical these activities are well supported through infrastructure, private sector businesses and visitor services. Many of the projects below have been identified through the Cruising the Murray Strategic Plan which provides direction on projects for enhancing the cruising and activity on waterways across the Murray region. The Murray Region Cruising Strategy, 2022 should be reviewed for further detail regarding each project.

REGIONAL PRIORITY PROJECTS

Facilitate Cruising Investment Experiences

Priority: Short-term

Key Partners: MRT, DRM, Councils, Industry, GMW and MDBA

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

Key multi-day cruise opportunities include:

- Echuca Multi-day Paddle Steamer Cruises.
- Mildura Multi-day Cruise Experience.
- Multi-day Canoe Trails.
- Canoe trail development in Gunbower.
- Mighty Murray to Mungo Iconic Tour.
- Lake Mulwala Cruises.

Key day cruise opportunities include:

- Lakes Restaurant Cruise.
- Winery and Nature Cruise.
- Lake Mulwala Nightlife Boat Cruise.
- Cobram to Tocumwal Beaches Cruise.
- Foraging Food Cruise.
- Cruises from Koondrook and Bahram.
- Fishing Tours.

Next Steps:

- **MRT to work with existing cruising operators to elevate existing product offering and address barriers to investment and growth in operations.**
- **Council and stakeholders to facilitate cruising investment in new experiences, with support from MRT.**

Water Access Infrastructure

Priority: Medium-term

Key Partners: MRT, DRM, Councils, GMW and MDBA

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

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

Key water access infrastructure requirements include:

- Wharves and temporary mooring points.
- Permanent mooring at Koondrook and Bahram.
- Houseboat moorings and marinas.
- Weir at Swan Hill.

Next Steps:

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

PILLAR 1: ACTIVE WATERWAYS

REGIONAL PRIORITY PROJECTS

Paddle Sports Hubs

Priority: Short-term

Key Partners: MRT, DRM, Councils, Industry, GMW and MDBA

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

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

Priority paddle sport hub locations include:

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

Next Steps:

- **MRT to develop a Paddlesports Hub model that can be delivered across the region.**
- **MRT to promote the opportunity to investors and liaise with tourism and economy development and planning units at Councils to support delivery of the Paddlesports hubs.**

Waterfront Activations

Priority: Ongoing

Key Partners: MRT, DRM, Councils, Industry, GMW and MDBA

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

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

Key destinations that require waterfront masterplans and/or investment include:

- Echuca-Moama (Bridge to Bridge Masterplan).
- Lake Mulwala Waterfront Masterplan.
- Deniliquin Waterfront Activation Precinct.
- Island Sanctuary, Deniliquin.
- Corowa-Wagunyah Waterfront Masterplan.
- Masterplan Development and Infrastructure Implementation for McLean Beach Riverfront.
- Swan Hill and Robinvale Riverfront Masterplan completion and investment.
- Moama Riverfront activation.
- Thompsons Beach Cobram.
- Yarrawonga Foreshore.
- Oddie's Splash Park, Albury.
- Finley Lake Masterplan implementation.

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

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

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

Next Steps:

- **MRT to support delivery of waterfront masterplans and projects that encourage waterfront activation through advocacy work.**
- **Councils to provide leadership in planning and delivery of waterfront project.**

PILLAR 1: ACTIVE WATERWAYS

REGIONAL PRIORITY PROJECTS

Waterway Regulatory Advocacy

Priority: Medium-term

Key Partners: MRT, Councils, GMW and MDBA

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

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

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

Next Steps:

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

Supporting Cruising Industry Development

Priority: Short-term

Key Partners: MRT, Councils and Industry

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

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

Opportunities identified within the Murray Region Cruising Strategy include:

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

Next steps:

- **MRT to review and deliver the above projects, as identified in the Murray Region Cruising Strategy.**

PRIORITY PROJECTS

PILLAR 2: INVEST IN ICONS

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

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

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

REGIONAL PRIORITY PROJECTS

Murray River Adventure Trail Delivery

Priority: Ongoing

Key Partners: MRT, DRM, Councils, Parks Vic and NPWS

The Murray River Adventure Trail (MRAT) has been a long standing delivery priority for MRT.

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

MRT needs to continue to advocate for funding of the trails delivery.

Next Steps

- **Parks Victoria to complete Construction of Stage 1.**
- **MRT to Advocate for funding of priority stage 2 detailed design and construction.**
- **MRT to undertake an activation plan for completion of stage 1 – business activation, marketing, tour and experience development.**
- **MRT to maintain knowledge of all projects currently being delivered under MRAT and promote completed projects.**
- **Councils to support delivery of MRAT where possible and plan trail connections to strengthen usage.**

Murray Esplanade and Port of Echuca Masterplan Refresh and Implementation

Priority: Short-term

Key Partners: Councils, GMW, MDBA, Campaspe Port Enterprise and Industry

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

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

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

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

Next Steps

- **Councils to develop a Bridge to Bridge Masterplan that considers water activation and use, moorings and cruising opportunities.**
- **Port of Echuca to unlock land assets to support private investment in visitor accommodation, tours and food and beverage.**

PILLAR 2: INVEST IN ICONS

REGIONAL PRIORITY PROJECTS

Mungo National Park Tourism Investment Masterplan and Business Case

Priority: Medium-term

Key Partners: MRT, DRM, Councils, Traditional Owners, NPWS and Industry

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

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

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

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

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

Next Steps

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

Gunbower National Park Investment Masterplan and Business Case

Priority: Medium-term

Key Partners: MRT, Councils, Traditional Owners and Parks Vic

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

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

Next Steps

- **MRT and Gannawarra Council to undertake preliminary engagements with Traditional Owners, Registered Aboriginal Parties and Local Aboriginal Land Councils.**
- **Gannawarra Council and MRT to support Parks Victoria in attracting funding for a masterplan and business case.**

PILLAR 2: INVEST IN ICONS

REGIONAL PRIORITY PROJECTS

Albury Wodonga Cultural Destination

Priority: Ongoing

Key Partners: MRT, DRM, Councils and Industry

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

Investment required in the destination includes:

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

Next Steps

- Council to advocate for funding to deliver priority cultural projects.
- MRT to promote Albury Wodonga as a cultural destination within the Murray region.

Murray Water Theme Park

Priority: Medium-term

Key Partners: MRT, Councils and Industry

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

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

Next Steps

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



PRIORITY PROJECTS

PILLAR 3: CREATE VIBRANT DESTINATIONS

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

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

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

REGIONAL PRIORITY PROJECTS

Murray Region Small Towns Streetscape and Activity Centre Enhancements Project

Priority: Short-term

Key Partners: Councils

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

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

Next Steps

- **MRT to advocate for investment in township amenity across the Murray region's smaller towns.**

Night-time Activation

Priority: Short-term

Key Partners: Councils and Industry

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

Issues around night-time activations are lack of staff, penalty rates, lack of support from residents, lack of investment, and the need for continuous commitment from operators.

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

Next Steps

- **Councils to invest in night time economy activation.**
- **MRT to advocate for reforms and access to funding.**

Murray Region Destinations Gateway Project

Priority: Medium-term

Key Partners: MRT, DRM and Councils

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

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

Meninya Street in Moama is also in need of enhancement as a key gateway to the region. Funding and construction are needed to deliver on this project.

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

Next Steps

- **MRT to work closely with key local governments and VicRoads to identify opportunities to improve gateway amenity.**
- **MRT to support and advocate for investment in town centres to create vibrant and visitor friendly destinations.**

PILLAR 3: CREATE VIBRANT DESTINATIONS

REGIONAL PRIORITY PROJECTS

Destination Food and Drink Development

Priority: Short-term

Key Partners: Councils and Industry

The quality and diversity of food experiences across the region is highly varied at present. Delivery of contemporary and consistency of high-quality food experiences is a critical aspect of the visitor experience and significantly impacts visitor satisfaction. Almost all local government partners identified the need for investment and attraction of food and drink venues.

There is need for a range of new investments in food and beverage across the region to meet contemporary visitor standards, including:

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

Next Steps

- **MRT to implement the Farm to Plate Strategy.**
- **MRT to undertake a Food and Drink Product Attractions Strategy for the Murray region. This will include:**
 - **Gap analysis of food and drink product.**
 - **Opportunities for destination dining and drink product.**
 - **Local produce and food experience development.**
 - **Removing investment barriers.**
 - **Supporting business investment.**
 - **Promotion of food and drink investment opportunities.**

Revitalising Swan Hill CBD

Priority: Short-term

Key Partners: MRT and Council

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

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

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

Next Steps

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

Arts and Culture Development

Arts and Culture has seen substantial investment in the Murray region with many destinations having established arts and cultural precincts, art trails and arts and cultural events.

Murray Regional Tourism will continue to support arts and cultural tourism development and promotion of arts and cultural product.

Arts and culture provides opportunities to activate precincts and towns and encourage all year-round visitation. Key precincts and product include:

- Port of Echuca
- Heartbeat of the Murray and Legends of the Mallee
- MAMA Albury
- Mildura Arts Centre & Rio Vista Historic House
- First Nations products and experiences
- Swan Hill arts precinct
- Arts and sculpture trails including silo art

Next Steps

- **MRT to continue to advocate for investment in arts, culture and heritage product.**

PRIORITY PROJECTS

PILLAR 4: ELEVATE FIRST NATIONS EXPERIENCE

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

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

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

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

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

Many Councils in the Murray region have Reconciliation Action Plans (RAP). These need to be considered in relation to supporting first Nations empowerment and self-determination.

REGIONAL PRIORITY PROJECTS

Murray Region First Nations Experience Development Plan and Promotion

Priority: Short-term

Key Partners: MRT, DRM, Traditional Owners, Parks Vic and NPWS

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

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

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

- Mungo National Park Tourism Investment Masterplan and Business Case
- Cruising with first nations interpretation
- Gunbower National Park Investment Masterplan and Business Case
- Barmah First Nations Masterplan and Business Case
- Pental Island Aboriginal Tourism Experience
- Island Sanctuary, Deniliquin
- Lake of Lights, Yarrawonga

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

Next Steps

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

PILLAR 4: ELEVATE FIRST NATIONS EXPERIENCE

REGIONAL PRIORITY PROJECTS

Barmah First Nations Tourism Masterplan

Priority: Medium-term

Key Partners: Yorta Yorta Nation Aboriginal Corporation, Parks Victoria, Moira Shire Council, Murray Regional Tourism

The Barmah First Nations Tourism Masterplan will establish a long-term vision to guide tourism development in and around Barmah National Park, with a strong focus on storytelling and immersive cultural experiences led by the Yorta Yorta people.

The Masterplan will build on the existing Joint Management Plan for the park, developed through an agreement between the Yorta Yorta Nation Aboriginal Corporation and the State of Victoria. Under this agreement, the Yorta Yorta Traditional Owner Land Management Board oversees the park's restoration and future care, with tourism identified as a key objective.

Barmah National Park is already a destination for campers and day visitors, offering activities such as camping, swimming, fishing, boating (including canoeing and kayaking), birdwatching, and bushwalking. However, there is untapped potential to elevate the visitor experience.

The proposed Masterplan aims to enhance and sensitively develop tourism opportunities within designated Visitor Experience Areas, fostering deeper cultural connection, environmental appreciation, and economic opportunities for the Yorta Yorta people.

Next Steps

- **MRT, Moira Council and Yorta Yorta to meet with key stakeholders to discuss the concept and establish a working group.**
- **Working Group to oversee the development of a Masterplan enhancing the existing assets with a focus on increasing visitation in an innovative and sustainable manner.**
- **Working group to Develop business cases for relevant projects identified in the Masterplan.**

Lake of Lights, Lake Mulwala

Priority: Medium-term

Key Partners: Yorta Yorta Nation Aboriginal Corporation, Murray Darling Basin Authority, Goulburn Broken Catchment Management Authority, Fisheries Victoria/NSW Department of Primary Industries (Fisheries), Goulburn Murray Water, Moira Shire Council, Federation Council

Leveraging the popularity of light installations and encouraging nighttime activity and increasing overnight stays a light installation is proposed for Lake Mulwala. Utilising the trees in the lake it is proposed to investigate opportunities to light some of these trees up (ideally using solar power sources) not dissimilar to the renowned Field of Lights at Uluru. The lights can be experienced from the shore or through ticketed boat cruises on select nights. Private boats could access the event following a ticketed route.

It is envisaged that the lights would be on for a limited duration to take into consideration the wildlife and amenity impact on residents.

The light installation could link to the First Nations history of the region or other seasonal themes and there could be a soundscape that accompanies the display. Revenue streams could be generated by private tour companies, guided waterfront walks, sunset picnic packages, silent disco, kayak hire, event hosting, pop up bars and cafes.

Consideration could also be given to temporary pontoon walks through the trees which would be a ticketed experience.

This project would support the existing light related activities in the region including the award-winning Bullanginya Dreaming in Barooga, creating opportunities for packaging and increasing length of stay.

It must be noted that there are many layers of approvals and various regulatory entities that will need to endorse such a project from both sides of the river, Victoria and NSW.

Next Steps

- **MRT and Moira Council to establish a working group to oversee the project.**
- **Moira Council to consider approvals from governing authorities and convene a working group.**
- **Working group to begin exploratory, conceptual discussion with artists.**
- **Moira Council to develop a business case for the project.**

PILLAR 4: ELEVATE FIRST NATIONS EXPERIENCE

REGIONAL PRIORITY PROJECTS

Cultural Centre, Powerhouse Precinct, Mildura Riverfront

Priority: Medium-term

Key Partners: MRT, Council, Traditional Owners and Industry

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

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

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

Next Steps

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



PRIORITY PROJECTS

PILLAR 5: DRIVE DEMAND

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

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

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

Improvement to destination brand will be a key feature for the Murray region. MRT is currently developing directions for marketing in its 3-year 2023-2026 Strategic Marketing Plan. Details of the Murray region brand and tactical marketing activities will be outlined in the Strategy.

A place-based approach needs to tie together the comparative strengths of each destination, delivery of unique and compelling product and delivery of events that create strong associations with the brand.

REGIONAL PRIORITY PROJECTS

Invest in World Class Motivational Visitor Accommodation

Priority: Ongoing

Key Partners: MRT, DRM, Councils and Industry

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

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

Next Steps

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

Existing Accommodation Refurbishment - Motels and Holiday Parks

Priority: Ongoing

Key Partners: MRT, DRM, Councils and Industry

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

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

Refer to the Murray Region Accommodation Study for project details.

Next Steps

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

PILLAR 5: DRIVE DEMAND

REGIONAL PRIORITY PROJECTS

Murray Region Brand Review and Refresh

Priority: Short-term

Key Partners: MRT

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

There is a need to review and refresh the regional brand hierarchy and the cohesion between the regional and destination level brands. Consideration should be given to Visit Victoria's recently released Destination Victoria Brand Strategy Playbook and the Murray region sub-brand outline in the Strategy.

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

Next Steps

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

Murray Region Online Bookable Product and Packaging

Priority: Short-term

Key Partners: MRT, DRM, Councils and Industry

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

Next Steps

- MRT to educate industry on the value of digital distribution as part of the marketing mix including ATDW and OTAs.
- MRT to educate industry on the importance of product packaging to attract high yield markets and extend spend and length of stay, and facilitate connections between industry to enhance collaboration.

Murray Region Drive Tourism Strategy and Implementation

Priority: Short-term

Key Partners: MRT, DRM and industry

Market research undertaken for the Murray Region has identified a significant proportion of visitors who are currently touring the Murray region and visiting multiple destinations in one trip, as well as a high level of interest from prospective visitors in doing the same.

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

Next Steps

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

Murray Region Signature Events and Infrastructure Strategy

Priority: Short-term

Key Partners: MRT, DRM, Councils and Industry.

Events will continue to be a key driver of visitation to the Murray Region. The last events strategy undertaken for the region was completed in 2014. It is necessary to undertake a new strategy which focuses solely on signature events attraction. Identifying gaps and opportunities in the Murray Region events calendar for iconic events in key destinations in the region. Murray Regional Tourism will work with stakeholders to establish a strategy which supports Local Government attract major events.

These events will align to the Destination Management Plan pillars and objectives.

The Strategy will also identify key gaps in signature event infrastructure such as indoor event venues required to support a year-round major events calendar such as Albury Entertainment Centre and Echuca Loco Shed development.

Next Steps

- MRT to establish an events sub committee to oversee the signature events strategy.
- MRT to commission and undertake the strategy.
- MRT to advocate for signature event funding off the back of the strategy to State and Federal Government.

PILLAR 5: DRIVE DEMAND

REGIONAL PRIORITY PROJECTS

International Market Development Strategy

Priority: Short-term

Key Partners: MRT, Visit Victoria and Destination NSW

The Murray Region is in a position where it has a number of products and experiences that would be suited to international markets. Unfortunately, the proportion of international visitors is still low compared to other destinations in Victorian and NSW. The Port of Echuca, First Nations Experiences, Heartbeat on the Murray and the Kyabram Fauna Park are examples of experience that have international market appeal.

Development of international markets would also support mid week and off-peak visitation to the Murray Region.

To progress the development of international markets an international market development strategy should be explored. This would:

- Identify internationally ready product
- Identify how operators can play in the international market space
- Investigate marketing opportunities to strengthen international market presence
- Identify international market segments to focus on.
- Product packaging opportunities
- International wholesale market opportunities.
- Tour companies which can support growth.
- Develop an action plan and strategy

Next Steps

- **MRT to commission an International Market Development Strategy.**

Murray River Festival

Priority: Short-term

Key Partners: MRT, DRM and Councils

Establish an event that celebrates the Murray River activating all the towns and villages along the river and key locations. The long-term vision would be that this festival encompasses the entire length of the Murray region. The event would celebrate the strengths of the region focussing on the river as the hero that holds strong public awareness.

The program may elevate and enhance existing products and trails such as the farm gate and silo art trails, offering activations at sites and businesses such as drawing workshops at the silos, sampling and tasting or cooking classes at the farm gates. The event would focus on a particular off-peak time of year such as spring and would require a solid marketing program to drive visitation to the region. The event could cover a month-long period to encourage repeat visitation for multiple events. For event sustainability it would be key to seek funding and sponsorship.

Next Steps

- **MRT to work with partner councils on the development of the Festival concept.**
- **MRT to create an Event Management Plan and Budget.**

PRIORITY PROJECTS

PILLAR 6: BUILD INDUSTRY CAPACITY AND FACILITATE GROWTH

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

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

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

REGIONAL PRIORITY PROJECTS

Regional Workforce Pathways and Promotion Program, and Skills Development Plan

Priority: Short-term and ongoing

Key Partners: MRT, DRM, Councils and Industry

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

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

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

Next Steps

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

Transport and Infrastructure Enhancement Advocacy

Priority: Medium-term

Key Partners: MRT, DRM, Councils and Industry

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

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

Transport needs across the region include:

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

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

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

Next Steps

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

PILLAR 6: BUILD INDUSTRY CAPACITY AND FACILITATE GROWTH

REGIONAL PRIORITY PROJECTS

Murray Regional Tourism Industry Leadership Program

Priority: Ongoing

Key Partners: MRT, DRM and Councils

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

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

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

Next Steps

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

Murray Region Local Ambassador Project

Priority: Ongoing

Key Partners: MRT, DRM, Councils and Industry

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

This may include:

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

Next Steps

- **MRT, in collaboration with Councils and tourism industry leaders, to develop a Local Ambassador program that will expand local knowledge and instil local pride in the region amongst business operators region-wide.**
- **Councils to implement actions from plan at the local level.**

Visitor Information Services Review and Delivery

Priority: Medium-term

Key Partners: MRT, DRM and Councils

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

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

Next Steps

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

Cross Border Research

Priority: Ongoing

Key Partners: MRT, DRM and Councils

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

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

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

Next Steps

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

MEASURES OF SUCCESS

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

Defined targets have been established against the six destination management objectives identified in this Plan, along with performance measures to track growth. This should be measured annually to track progress against the targets and ensure successful delivery of the Destination Management Plan.

PERFORMANCE TARGETS FOR THE MURRAY REGION

Alignment to DMP Objectives	Targets	Performance Measures	
(1) Economic Growth Drive regional dispersal and exploration of the region to strengthen emerging destinations and yield. Encourage year-round visitation growth to support business sustainability.	Increased spend per visitor.	<u>Now (2024)</u>	<u>2027</u>
	Increased visitor length of stay.	6.3 million visitors to the Murray region.	6.7 million visitors to the Murray region.
	Increased visitation, in particular holiday and leisure, family and luxury travellers.	\$397 per visitor to the Murray region.	\$430 per visitor to the Murray region.
	Increased repeat visitation.	\$2.5 Billion in direct expenditure to the Murray region.	\$2.8 Billion in direct expenditure to the Murray region.
		<u>Tools to Measure Performance</u> Track visitation and expenditure performance using National and International Visitor Survey, Tourism Research Australia.	
(2) Investment Encourage the development of motivating products and experiences to attract new markets and grow yield from existing markets.	Public and private sector investment in a diverse range of tourism products, infrastructure, experiences and accommodation.	Additional tourism businesses registered in the Murray Region.	
	Improved diversity of product, experience and accommodation offering.	<u>Tools to Measure Performance</u> - Australian Business Register – additional businesses registered in the tourism sector by ANZIC subdivision. This can be tracked using MRT's subscription to Monitor CRMS. - ATDW to identify new businesses listed	
(3) Industry Development Support First Nations led development and delivery of tourism experiences. Facilitate partnerships to develop cohesive cross border destinations and identities.	Public and private sector investment in First Nations tourism products and experiences, led by Traditional Owners.	New First Nations products and businesses within the Murray Region.	
	Increased industry collaboration.	Tracking number of cross border LTA's and level of LGA partnership cross border.	
	Improved cross border collaboration.		
	Improved industry performance and health.		
(4) Sustainability Promote sustainable approaches to tourism with consideration of economic viability, environmental protection and social equity.	Improved resilience to natural disasters and disruptive events.	Number of businesses and destinations with eco-tourism certification.	

APPENDICES

APPENDIX A DESTINATION MANAGEMENT PLAN PROCESS

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

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

1. Research and Analysis	2. Engagement
• Background documents reviewed (regional, State and Federal strategies, Council plans, strategies, events audits etc.). • Murray Region Accommodation Audit 2022. • Murray Region Product And Experience Audit 2022. • Murray Region Consumer Research 2022 (past visitor survey, Australian audience survey, focus groups). • Review of Tourism Research Australia visitation data, key products and experiences, market research and target markets. • Competitive Positioning Analysis. • SWOT Analysis. • Murray River Cruising Strategy 2022.	• Internal Murray Regional Tourism workshops. • Accommodation Operator Survey. • LGA workshops by subregion (Revitalising the Murray). • Ten half-day workshops at destination level with local tourism industry, stakeholders (e.g. industry associations/chambers), representatives of Local Government. • Traditional Owner workshops. • Accommodation operator workshops and 1:1 engagements. • Cruising operator workshops and 1:1 engagements. • Stakeholder workshops. • Destination NSW. • Visit Victoria. • Parks Victoria. • Department of Environment, Land, Water and Planning. • NSW National Parks and Wildlife Service. • Department of Forestry. • Cross-Border Commissioner.
3. Project Assessment	4. Destination Management Plan
• Identification of strategic assessment criteria. • Review of past DMP project delivery and progress. • Review of Local Area Plan priority projects.	• Strategic Framework. • Priority projects. • Reporting.

APPENDICES

APPENDIX B DESTINATION MANAGEMENT DOCUMENTS REVIEWED

Murray Regional Tourism

- Murray Regional Tourism Annual Report, 2019-20
- Murray Regional Tourism Strategic Plan, 2021-24
- Murray region Destination Management Plan, 2018-2022

New South Wales

- NSW Visitor Economy Strategy, 2030
- NSW Aboriginal Tourism Action Plan, 2017-2020
- NSW Food & Wine Tourism Strategy & Action Plan, 2018-2022
- NSW Regional Conference Strategy & Action Plan, 2017-2021
- NSW Statewide Destination Management Plan, 2019
- NSW Cruise Development Plan, 2018

Victoria

- Coronavirus (COVID-19) impact on Victoria's Visitor Economy, TEVE, 2021
- Victoria's 2020 Tourism Strategy, 2013
- Victoria's China Tourism Strategy, 2012
- Victoria's Regional Tourism Strategy, 2013-2016
- Victoria's Trails Strategy, 2014-24
- Victoria's Golf Tourism Strategy, 2018-23
- Central Victorian Green House Alliance

Western Murray

- Light State Expression of Interest, 2021
- Mildura Regional Development Strategic Plan, 2021-2024
- Mildura Rural City Council Event Strategy, 2025
- Mildura Riverfront Stage 2 Final Masterplan, 2019
- Mildura Rural City Council Visitor Servicing Strategy, 2025
- Powerhouse Place Digital Activation Project, 2021
- Sustainable Wentworth Strategy, 2016

- Dareton Revitalised Strategy, 2021
- Buronga Gol Gol Structure Plan Report, 2020
- Willow Bend Caravan Park Proposed Future Layout

Mid-Western Murray

- Swan Hill Destination Marketing Strategy, 2021
- Swan Hill Community Vision and Council Plan, 2021-2025
- Swan Hill Rural City Council Investment Prospectus Snapshot, Swan Hill Rural City Council, 2020
- Economic Development Insights Report, Swan Hill Rural City Council, 2021
- Victorian Visitor Economy Master Plan Priority and Project Development: Pental Island, Swan Hill – Lake Boga Path and Riverside Splash Park
- Gannawarra Shire Council Strategic Tourism Plan, 2021-2026
- Gannawarra Shire Council Economic Development Strategy, 2019-2024
- Gannawarra Shire Council Waterfront Masterplans, 2019

Central Murray

- Meninya Street South Masterplan Report, 2019
- Moama Bridge Arts Precinct and Meninya Street Masterplan, 2019
- Moama Murray River Access Plan, 2012
- Murray River Council Waterfront Strategy Request for Quotation, 2021
- Murray River Council Priority Projects, 2021

Mid-Eastern Murray

- Federation Council Priority Projects
- Federation Council Economic Development Strategy, 2021-2025
- Corowa Riverfront Master Plan Report, 2010
- Delivery Program and Operational Plan Federation Council, 2021

- North of the Murray 5 Year Destination Marketing Strategy and Implementation Plan, 2020-2024
- Mulwala Foreshore Public Open Space Masterplan, 2015
- RDA Murray Strategic Plan, 2019
- Destination Riverina Murray NSW Destination Management Plan, 2018
- Berrigan Shire Tourism Strategy, 2019-2023

Eastern Murray

- Lake Hume Site Plan Recommendations and Architectural Concept, 2018
- Albury Wodonga Visitor Economy Trends Report, 2020
- Albury City Council Albury CBD Masterplan, 2009
- Albury City Council Albury Riverside Precinct Concept Plan, 2021
- Albury City Council Riverside Precinct Stage 2 Refined Concept Design, 2016
- Albury Wodonga Destination Management Plan, 2019-2023
- Albury City Council Economic Indicators, 2021
- Albury City Council Local Strategic Planning Statement, 2020
- Murray River Experience, Albury City Council, 2007
- Two Cities One Community Strategic Plan, 2017-21
- Gateway Island Masterplan Report, 2018
- City of Wodonga Cultural Services Plan, 2021-2026
- Goulburn Murray Water Lake Hume Land and On-Water Management Plan, 2015
- Greater Hume Council Local Strategic Planning Statement, 2018
- Greater Hume Council End of Term Report, 2021
- Greater Hume Shire Community Strategic Plan, 2017-2030
- Greater Hume Visitor Information Centre Business Plan, 2018-2022
- Greater Hume Shire Visitor Experience Plan, 2015-2018

APPENDICES

APPENDIX C ACRONYMS AND GLOSSARY OF TERMS

ACRONYMS

AAGR	Average Annual Growth Rate
ABR	Australian Business Register
CALD	Culturally and Linguistically Diverse
DEECA	Department of Energy, Environment and Climate Change.
DJSIP	Department of Jobs, Skills, Industry and Regions
DMP	Destination Management Plan
DNSW	Destination NSW
DN	Destination Network
DRM	Destination Riverina Murray
IVS	International Visitor Survey
LGA	Local Government Area
LTA	Local Tourism Association
MDBA	Murray Darling Basin Authority
MRT	Murray Regional Tourism
NPWS	NSW National Parks and Wildlife Service
NVS	National Visitor Survey
RDV	Regional Development Victoria
TRA	Tourism Research Australia
VFR	Visiting Friends and Relatives
VTIC	Victorian Tourism Industry Chamber

GLOSSARY OF TERMS

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



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