

REGIONAL TOURISM ACTION PLAN 2009 – 2012



Tourism Victoria



You'll love every piece of Victoria

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Tourism Victoria has been long focused on assisting the tourism industry at a regional level to respond to and rise above challenges. The *Regional Tourism Action Plan 2009–2012* will assist Victoria's regions fulfil their opportunities to fully meet their tourism potential. In this highly competitive environment it is imperative that our regional offerings are distinct and tailored to meet the needs of the destination and visitors alike.

The importance of tourism should not be underestimated. Tourism offerings highlight the value of local and natural attractions, generates economic activity, jobs and export revenues.

The Regional Tourism Action Plan 2009–2012 addresses cross-regional issues and confirms priorities for each of Victoria's ten tourism regions. To deliver positive outcomes for local communities and regional Victoria, a coordinated and well supported effort is critical. The Plan provides strategies to boost the economic benefits and employment growth of the tourism industry in regional Victoria and outlines strategies to meet challenges faced by tourism operators and communities.

The Plan has involved extensive industry consultation and sets out the future direction of tourism through various strategies and recommendations with a particular focus on improving regional industry structures, improving the supply and quality of tourism experiences, increasing consumer demand for regional tourism and increasing the availability of skilled workers and improving service standards.

This Plan is an excellent example of industry and government working together to further develop a market where Victoria has a natural advantage.

Steering the direction of regional tourism into the future over the next three years Tourism Victoria will work with industry to ensure that the regional tourism sector continues to compete and flourish.

A stylized, handwritten signature in black ink, consisting of a series of loops and a long horizontal stroke.

Gregory Hywood
Chief Executive

STRATEGIC CONTEXT

Strategy overview

The Victorian Government set out its ambitious vision for tourism in 2006 with the release of the *10 Year Tourism and Events Industry Strategy*, which aims to expand the tourism sector to an \$18 billion industry, employing 225,000 people by 2016. A key plank of this strategy is regional destination development.

The *Tourism Victoria Business Plan 2008–2011* articulates how the organisation will fulfil the commitments of the Government's 10-Year Strategy and maps out a path to industry growth.

To further consolidate and refine Tourism Victoria's activities in regional Victoria, the *Regional Tourism Action Plan 2009–2012* (RTAP) has been developed. The Plan aims to chart a clear course of action to respond to the various challenges impacting tourism growth in regional Victoria (refer to figure 1).

Figure 1. Key Government plans for Victoria's tourism sector



The directions in the RTAP support the key strategies outlined in *Victoria's Nature-based Tourism Strategy 2008–2012*, which was developed cooperatively by Tourism Victoria, Parks Victoria and the Department of Sustainability and Environment. In addition to the Nature-based Strategy, a number of other strategies and action plans have or are being developed for segments such as: spa and well-being; trails; food and wine; alpine resorts; arts, theatre and cultural heritage; and golf.

The RTAP has been developed through extensive consultation with key partners and stakeholders from across the State including other Victorian Government agencies, Local Government, tourism industry bodies and operators. The recommendations from the Victorian Parliament's *Rural and Regional Committee Inquiry into Rural and Regional Tourism* and a number of industry feedback submissions have also been considered in the development of the final Plan.

The Victorian Government is committed to grow tourism in regional Victoria

The Victorian Government has strongly supported regional tourism and will continue to do so in the future through marketing, investment attraction and a range of supporting activities. This commitment is demonstrated in a range of funding initiatives announced in the 2008–09 State Budget including:

- \$13.3 million over four years to help Victoria's ten regional areas to market their regions domestically and facilitate the involvement of industry and Local Government in Tourism Victoria campaigns;
- \$8 million over four years to promote Victoria in key international markets, including traditional source markets such as North America, Europe and South Asia as well as emerging markets such as China and India; and
- \$13.8 million over two years to further promote Victoria's credentials as a world-class business events destination, including \$3 million for the Australian Tourism Exchange in 2009.

In addition to the above, \$650,000 over two years has been provided as part of the *Moving Forward: Update – The Next Two Years 2008 to 2010*, to fill gaps in tourism products and for skills development in provincial Victoria.

CURRENT CHALLENGES

The catalyst for reviewing the strategic direction of regional tourism is the rapidly changing environment, which has fundamentally altered the way consumers think, behave and travel. Key challenges impacting regional tourism include:

Global financial crisis

The recent global financial crisis and destabilisation of the world economy presents a number of challenges for the Victorian tourism industry. The slow-down in global economic and jobs growth has heightened consumer uncertainty. This is expected to slow spending in discretionary categories such as tourism and leisure, particularly from key inbound markets. The decline in confidence is also having flow-on effects in terms of investment, which could have a negative impact on the tourism sector.

Exchange rate volatility

The Australian dollar has suffered a significant decline in the wake of the global financial crisis, down to an October 2008 low of US\$0.60 from a July 2008 high of US\$0.98. This shift may have positive repercussions on the Australian tourism industry as it will increase the attractiveness of Australia to international travellers considering long-haul travel. It is also expected to result in Australians switching from more expensive outbound travel to domestic destinations.

Stagnant domestic tourism sector

National visitation data shows that there has been a progressive decline in domestic leisure travel for virtually all travel categories since 2000. People have been taking fewer trips, spending fewer nights away and spending less per trip¹. This has been driven by a range of factors such as increased competition from overseas destinations, changing consumer expenditure patterns and growth in low cost airlines. The decline in domestic visitation to regional areas is a phenomenon that is also occurring nationally and in most western countries.

Changing consumption patterns

Domestic tourism's share of household consumption has declined, with a shift towards other categories (e.g. entertainment systems, renovations etc). Households are also servicing higher levels of debt, which is putting pressure on discretionary expenditure. Budgets have been stressed further in recent times by high petrol prices which has suppressed demand for regional and touring experiences. However, this trend has started to reverse in the wake of the global financial crisis which has seen fuel costs decline from more than US\$140 a barrel to around US\$60 a barrel (October 2008).

Climate change

Climate change has emerged as the key global environmental and economic challenge of the 21st century. It has significant implications for individuals, communities, governments and businesses, particularly within the tourism sector which is extremely reliant on the natural environment. Consumer awareness of climate change and environmental issues, especially the impacts of long-haul air travel, has increased substantially, creating greater pressure for the tourism industry to adopt more sustainable and environmentally friendly business practices and policies.

Drought and other crises

There has been an increase in the number of natural crises in Victoria in recent years, including bushfires, floods and drought. The impacts of future drought and the uncertainty of climate change on water availability is an issue for many of Victoria's regions and their tourism attractions.

¹ Tourism Research Australia 2007 Report, *Changing consumer behaviour: Impact on the Australian domestic market.*

CURRENT CHALLENGES CONTINUED

Increase in outbound travel

Australians have increased their spending on international travel which many consumers perceive to have more prestige and offer better value for money than domestic travel. This has been fuelled by the strength of the Australian dollar and increases in airline seat capacity and holiday deals, which have made outbound travel more affordable. However, this trend may change with the recent dollar devaluation, which is likely to result in travellers deferring overseas travel in favour of domestic destinations.

Growth in low cost carriers

The growth in low cost air carriers and route networks has increased capacity between tourism destinations and made air travel more accessible to a broader range of consumers. This shift presents a challenge for regional centres that are not in close proximity to major airports.

Labour market shifts

Changes in the Australian labour market, including the increasing casualisation of the workforce, longer working hours and the stockpiling of annual leave (the Australian working population has around 70–90 million days of unused leave²), have impacted the domestic tourism sector.

Competition for labour has also intensified and left the tourism sector vulnerable to skills shortages and increasing wage costs. Labour and skills shortages are particularly noticeable in regional Victoria, where it can be difficult to attract and retain staff.

Rise of new technologies and media fragmentation

The emergence of new media and increased access to information has made consumers more savvy when selecting destinations and booking travel. The emergence of user generated sites and blogs has also enabled consumers to seek advice from a range of sources when making decisions about travel destinations, and made them harder to influence via traditional marketing. The increase in information has also increased consumer awareness of real value for money propositions.

Increasing competition

Victoria is facing intense competition from both domestic and overseas destinations which are becoming more innovative in aggressively marketing their offerings. Other destinations have been more aggressive in attracting new investment and developing new tourism experiences to better match the needs of today's more discerning consumers.

Demographic shifts

The demand for new and exciting tourism experiences has become more intense due to significant shifts within Australia's population. A key factor is Australia's ageing population, driven by the Baby Boomer generation entering retirement. This may create greater demand for appropriate travel experiences for this segment e.g. Grey Nomads.

The Generation Y and new Generation Z segments will also influence the future of the tourism sector. Although these segments value holidays highly, they are also more discerning and typically seek very unique travel experiences. They are also more mobile and casual in their approach to life and work, creating challenges for tourism marketing.

² AC Neilson, *Unused Leave and Travel Intentions Study 2005*.

The flat domestic tourism sector is a significant challenge for regional Victoria

Victoria's regional tourism industry has been impacted by the flat domestic tourism sector, evident in every State and Territory in Australia and in other countries around the world. Domestic tourism accounts for more than 97 per cent of total overnight tourism visitation in regional Victoria and is a significant driver of income for many regional tourism businesses.

According to results from the National Visitor Survey³, domestic overnight visitor numbers to regional Victoria reached 11.3 million for the year ending June 2008, an increase of 0.9 per cent from the previous year. Although the latest results are positive, the longer term picture reinforces the challenges that regional Victoria has faced over the past few years. During the period June 2004–2008 domestic visitor numbers to regional Victoria decreased by 2.2 per cent per annum. Over the same period domestic visitor nights to regional Victoria also decreased by 2.7 per cent per annum.

A key concern for regional Victoria has been the decline in the intrastate market, which comprises 82 per cent of total domestic and international travel in regional Victoria and is the mainstay of income for many regional businesses. Intrastate overnight visitors to regional Victoria reached 9.5 million for the year ending June 2008, up 0.4 per cent over the previous year. Over the period June 2004–2008, intrastate overnight visitation has decreased by 2.1 per cent per annum. During the same period intrastate visitor nights to regional Victoria decreased by 1.9 per cent per annum.

Interstate visitation to regional Victoria has also been in decline in the past few years, down 2.7 per cent per annum over the period June 2004–2008. Recent interstate overnight visitation results have been more positive, reaching 1.8 million for the year ending June 2008, an increase of 3.9 per cent over the previous year.

Table 1. Key visitation indicators for regional Victoria

	Australia (%)	Victoria (%)	Regional Australia (%)	Regional Victoria (%)
Total overnight visitor growth				
2004–08 growth (AAG*)	-0.5	-0.5	-1.2	-2.1
2007–08 growth	-1.7	+2.1	-1.5	+1.1
Intrastate overnight visitation				
Share of total	62.1	63.3	74.1	82.0
2004–08 growth (AAG*)	-1.4	-1.6	-1.4	-2.1
2007–08 growth	-2.5	+1.2	-1.8	+0.4
Interstate overnight visitation				
Share of total	31.2	28.7	21.2	15.2
2004–08 growth (AAG*)	+0.7	+1.1	-1.4	-2.7
2007–08 growth	-0.6	+4.7	-0.9	+3.9
International overnight visitation				
Share of total	6.7	7.9	4.2	2.8
2004–08 growth (AAG*)	+2.7	+3.5	+2.7	-0.5
2007–08 growth	0.0	+0.4	+0.8	+7.5

Sources: National Visitor Survey, International Visitor Survey, Tourism Research Australia, July 2003 – June 2008.
*Average Annual Growth

³ National Visitor Survey, Tourism Research Australia, year ending June 2008.

Visitation results indicate that the performance of regional Victoria in attracting visitors varies depending on key factors such as proximity to Melbourne and access to facilities such as airports. Domestic visitation results for the surrounding regions of Melbourne⁴ have been positive over the period 2004–2008 with average annual growth of 1.8 per cent per annum (refer to figure 2). In comparison, distant regions experienced a decline in domestic visitation, down 3.9 per cent per annum over the same period. This difference in performance highlights the additional challenges faced by Victoria's distant regions in enticing visitors to travel beyond a short radius of Melbourne.

Although recent indicators point to an improved performance within the domestic sector, particularly for interstate visitation, the Tourism Forecasting Committee predicts that domestic tourism will continue to face a number of significant challenges, which may be compounded further by the impacts of the global financial crisis⁵. The number of domestic tourism trips in Australia is forecast to grow at a modest average annual rate of 1.4

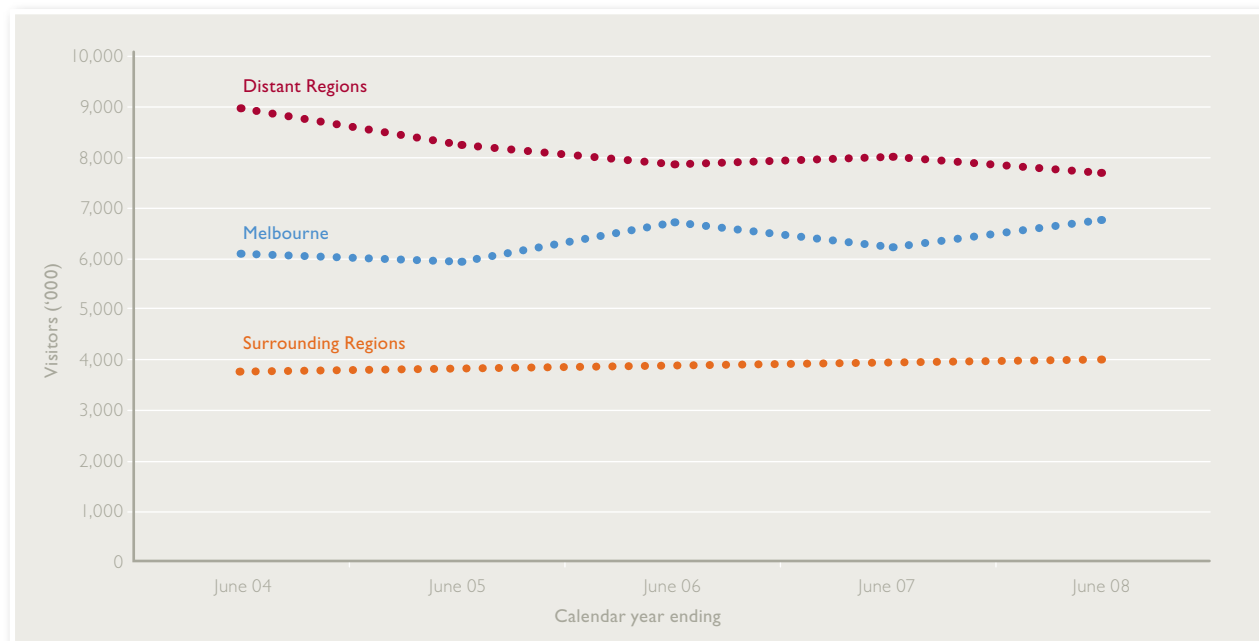
per cent between 2007 and 2017. The outlook for domestic visitor nights nationally is less positive, with nights predicted to fall at an annual average rate of 0.3 per cent each year between 2007 and 2017.

International tourism presents long-term opportunities for regional Victoria despite current global economic uncertainty

For the year ending June 2008 international visitation to Victoria reached a record 1.5 million visitors, representing an average growth of 3.5 per cent per annum over the period 2004–2008⁶. International overnight visitors to regional Victoria reached 324,000 for the year ending June 2008, representing a slight decline of 0.5 per cent per annum over the period 2004–2008⁷.

International visitation contributed only 2.8 per cent of total overnight visitation to regional Victoria during the year ending June 2008 and remains a small component of overall tourism business into Victoria's regions compared to the domestic sector.

Figure 2. Total domestic overnight visitor dispersal in Victoria



Source: National Visitor Survey, Tourism Research Australia, July 2003 – June 2008.

⁴ This includes Geelong and destinations within Daylesford and Macedon Ranges, Yarra Valley and Dandenong Ranges, Mornington Peninsula and Phillip Island regions.

⁵ The latest available Tourism Forecasting Committee data was released in August 2008 and does not take into account the impacts of the recent global financial crisis on the tourism sector.

⁶ International Visitor Survey, Tourism Research Australia, year ending June 2008.

⁷ The 2004 base figure is influenced by the effects of Severe Acute Respiratory Syndrome (SARS) and other international events.

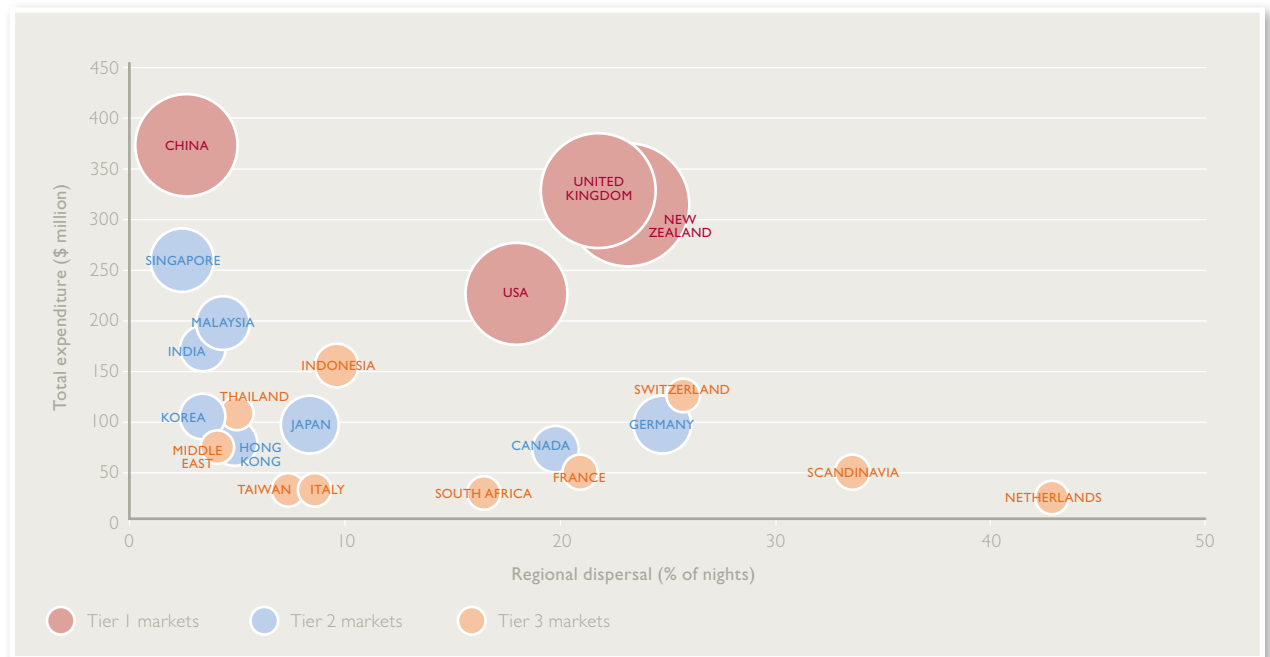
Although international visitation to regional Victoria is likely to remain small in the foreseeable future, it does present some long-term opportunities and delivers additional benefits in terms of filling inventory during off-peak periods (e.g. mid-week/shoulder seasons) and yield. Over the next decade 70 per cent of tourism expenditure growth in Victoria is predicted to come from international visitation. Much of this growth is predicted to come from markets like China, India and the Middle East, whose economic outlook remains solid despite the current climate of global financial volatility.

Attracting inbound tourists is a significant challenge for regional Victoria as international visitors, especially from high growth markets such as China and India typically have lower levels of regional dispersal. As indicated in figure 3, the markets with the highest propensity to travel to regional Victoria are western markets such as Europe, United Kingdom, New Zealand and North America.

Given the current global economic climate and deteriorating consumer confidence, the short to medium term prospects for regional Victoria from key international markets may be challenged and visitation trends will be monitored closely to determine future strategic actions. Some of Victoria's key Tier 1 and Tier 2 markets are particularly vulnerable to the global financial crisis including North America, United Kingdom, New Zealand, Singapore and Japan.

The chart below depicts the visitor volume of Victoria's key international markets by the size of the circles (e.g. the larger the circle the higher the volume). The vertical axis represents the total expenditure generated by distinct markets, with the largest total expenditure delivered by the Chinese market. The horizontal axis notes the percentage of nights spent in regional Victoria. Therefore the markets with the greatest propensity to stay in regional Victoria include the Netherlands, Scandinavia, Switzerland and Germany.

Figure 3. International dispersal in regional Victoria



Source: International Visitor Survey, Tourism Research Australia, June 2008, TRA expenditure allocation method applied to June 2008 International Visitor Survey data.

A photograph of an indoor spa area. In the foreground, a hot tub with bubbling water is visible. A person is partially submerged in the water on the left. In the background, a person wearing a white robe is walking across a tiled floor. The room has a high ceiling with a wooden panel and large windows. An orange semi-transparent box is overlaid on the upper half of the image, containing white text.

PART A: INITIATIVES TO ADDRESS STATE-WIDE REGIONAL TOURISM ISSUES

Challenges and priorities for regional tourism in Victoria

Why is this issue important?

Effective regional industry structures are a key factor in building successful tourism destinations. Many regional tourism organisations across Victoria have played a lead role in the development of the tourism industry and directly influence visitation, yield and visitor satisfaction.

The structure of Victoria's regional tourism industry is facing a number of new challenges due to the rapidly changing environment. This needs to be addressed in order to provide a strong platform for growth. Extensive consultation has identified a number of issues with the current industry structures in regional Victoria which reinforce the need for change, including:

- Many regional structures are under-resourced and lack adequate funding support;
- Regional structures rely heavily on volunteers who are struggling to cope with competing demands from their own businesses;
- The roles and responsibilities of some regional structures are unclear or duplicated;
- Many regions do not have adequate communications mechanisms in place to ensure that all stakeholders are informed and engaged in tourism development;
- Industry is unclear about how to work with and engage with Tourism Victoria on issues outside of marketing;
- Regional Campaign Committees focus on marketing and are unable to address other critical issues impacting regional tourism growth such as product development, investment attraction, skills training and sustainability management; and
- There is recognition that sustainable tourism development at the regional level requires a more strategic focus to create a strong foundation for industry growth.

What have we already done?

Some regions in Victoria have already undertaken structural reviews to determine the most appropriate model for their local industry in the future. Some positive case studies have been noted in regions such as Gippsland and Grampians, which has provided the catalyst to continue this successful approach across the State.

The strategic partnership in Gippsland has had a major impact on advancing the performance of the tourism sector in the region. Establishing the new structure involved forging a strong partnership between Local Government bodies and Tourism Victoria to successfully centralise and co-ordinate tourism activities through a peak regional tourism body – Destination Gippsland Limited (formerly Inc). A professional executive was also appointed to implement the new structure and manage tourism development in the region.

The revised approach to industry leadership in Gippsland has yielded many positive outcomes for the local tourism industry such as:

- Established clear leadership for the tourism sector;
- Overcame fragmentation within the industry and engaged a broader range of partners in tourism development;
- Enabled better coordination of activities and more effective use of resources;
- Improved communication between industry bodies and stakeholders;
- Provided a more effective mechanism to respond to crises including bushfires and drought;
- Created a more powerful advocacy voice for the tourism sector in the region;
- Promoted the value of tourism in the region to the broader community; and
- Created a central point of contact to liaise with Government (especially Tourism Victoria) on regional issues.

What will we do in the future?

- Evolve industry structures in regional Victoria over the next three years. This will involve the creation of a Regional Tourism Board (RTB) in each region to set the overarching strategic vision and direction for tourism. The RTB will play a critical role in creating a platform for future growth and will have responsibility for a range of key tourism functions. The proposed roles and responsibilities of various tourism bodies in regional Victoria follow:

Regional Tourism Board (RTB)

Responsible for holistic tourism development and advocacy for the region. Functions will include regional marketing, industry development, product development, skills training, mentoring, networking, identifying investment priorities and managing sustainability. The RTB will play an important role in consolidating the strategic direction of the tourism industry for the entire region and communicating with key partners such as Tourism Victoria.

Regional Tourism Association (RTA)

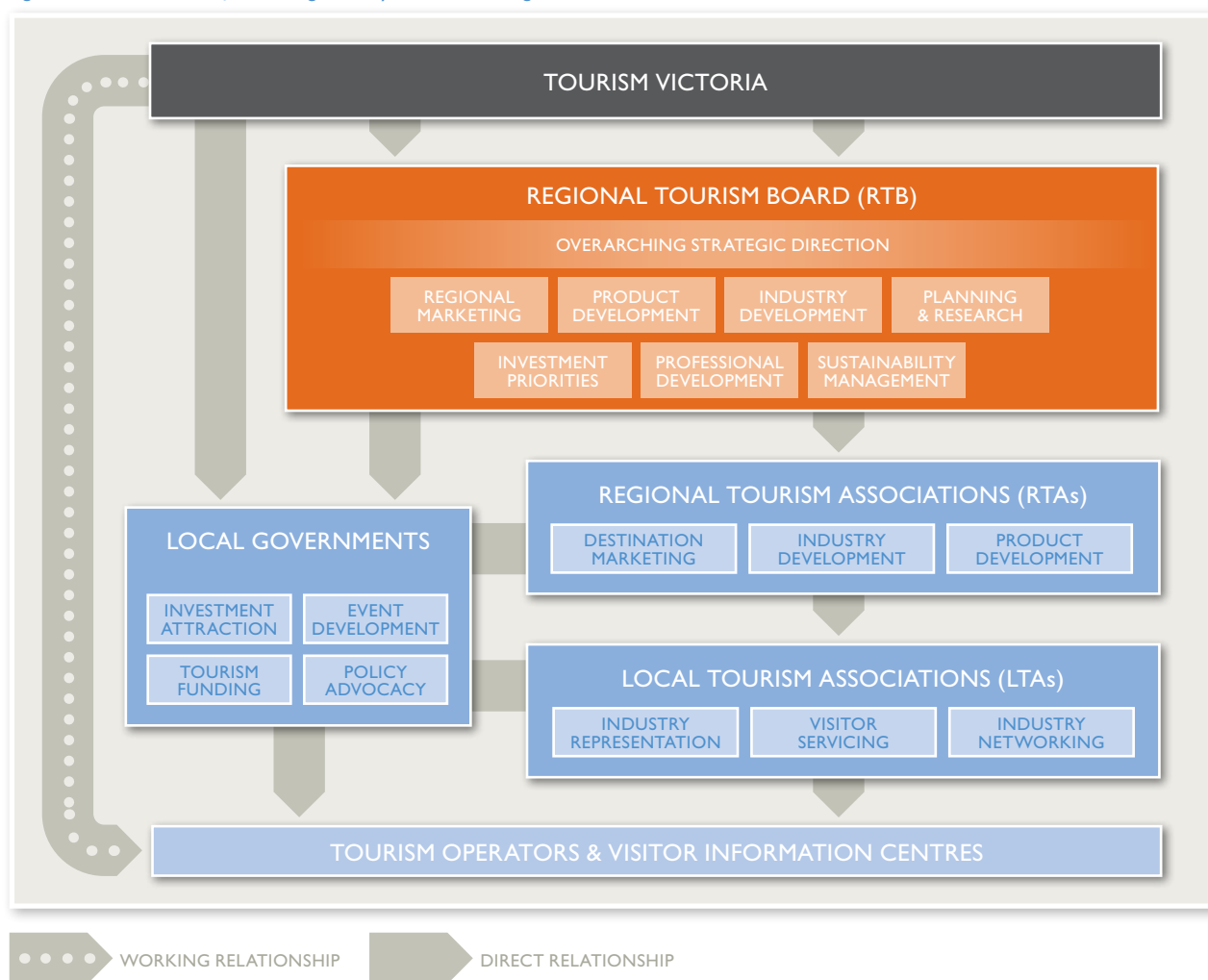
Responsible for the management and development of tourism within a sub-region or product group and increasing visitation and yield through destination marketing. Activities include representing Local Tourism Associations (LTAs), industry sectors and/or Local Government on issues affecting the tourism industry within their region. RTAs will have an important liaison role between the RTB and local industry.

Local Tourism Association (LTA)

Represent local tourism businesses and focus their efforts on enhancing the visitor experience. Activities include conducting industry networking functions, conducting local familiarisation tours and advising Local Government on local tourism issues.

- The new RTBs will not replicate other structures nor create additional bureaucracy in the region. The current Regional Campaign Committees will be disbanded once the new RTBs are in place. Where appropriate, relevant sub-committees will be created to support the new Boards for key activities such as marketing. This will ensure that the Boards are not overly burdened with operational matters and are able to focus on key strategic issues.
- The RTBs will be made up of approximately eight skills based members from an appropriate geographic spread across the region, as well as relevant State and Local Government representatives. A senior manager from Tourism Victoria will have a place on each RTB to create more effective liaison and decision-making processes.
- An Executive Officer will be appointed to the RTB where required to help alleviate the current burden on volunteers. This position will be responsible for implementing the strategies of the RTB and will play an important role in liaising with stakeholders including Regional Tourism Associations (RTAs), Local Government and State Government. Funding for this position will be determined through the development process however, it is anticipated that it will be jointly funded by State Government, Local Government and industry.
- The Executive Officer and RTB will be the primary points of contact with Tourism Victoria on most regional issues. Other regional tourism bodies (such as RTAs) will also be able to influence Tourism Victoria's agenda by working through the RTB. Tourism Victoria will also continue to work directly with Local Government, particularly on issues such as tourism funding and investment attraction.
- The final model for each RTB will be determined on a region by region basis. The structure will be developed in consultation with regional stakeholders to ensure that the appropriate structure is in place to address the unique needs and expectations of the region. Critical details including governance arrangements, responsibility charters, position descriptions, funding and performance criteria will be determined cooperatively through this process. A potential implementation model is illustrated in figure 4.
- The proposed implementation schedule for the roll-out of the RTBs is noted in the actions table. This three-year roll-out plan has been determined based on factors such as size, maturity, industry engagement, resourcing, Local Government support and staffing.
- Tourism Victoria has noted that a number of destinations are concerned about their fit within current regional campaign boundaries. Whilst there are no plans to change the campaign boundaries, relevant destinations will be provided with assistance to review their status and future positioning.

Figure 4. Potential model for evolving industry structures in regional Victoria



Actions	Timing
Industry structures	
Provide further assistance to support the new industry structures in Gippsland and Grampians.	2009
Lead the development of a new Regional Tourism Board in the Murray in association with Tourism New South Wales, Local Government and other stakeholders.	2009
Lead the development of a new Regional Tourism Board in Daylesford and the Macedon Ranges in cooperation with Local Government and other local stakeholders.	2009
Work with industry, Local Government and other stakeholders to evolve industry structures in Victoria's High Country, Great Ocean Road and Goldfields.	2009–10
Consult with industry stakeholders to evolve industry structures to take on a wider role for Mornington Peninsula, Phillip Island and Yarra Valley and Dandenong Ranges.	2010–11

IMPROVING THE SUPPLY & QUALITY OF TOURISM EXPERIENCES

Why is this issue important?

Investment attraction and supporting infrastructure are identified as priorities in the *10 Year Tourism and Events Industry Strategy* and *Victoria's Nature-based Tourism Strategy 2008–2012*. The investment priorities identified in the RTAP fulfil the following criteria:

- Respond to a market opportunity and latent demand for tourism infrastructure;
- Enhance tourism product strengths;
- Maximise yield;
- Deliver a sustainable triple bottom line competitive advantage; and
- Address regional development and infrastructure priorities.

Stakeholder feedback has indicated that it can be difficult to attract and facilitate regional tourism investment. This type of investment often has a relatively high risk profile and requires strong investor knowledge and experience. For some investors, planning and regulatory processes, particularly those relating to Crown land, are considered complex and not conducive to tourism investment.

Regional stakeholders have also highlighted transport access as an issue, particularly the capacity of regional airports, the need for road upgrades and the lack of transport once visitors have reached their destination e.g. lack of taxis or hire car facilities.

Effective road signing is important for visitor navigation, dispersal and satisfaction. It is also significant for the many small to medium-sized tourism operators in regional Victoria that rely on signing to direct visitors to their businesses.

What have we already done?

Tourism Victoria is taking the lead in realising the following initiatives:

- Implementing *Victoria's Nature-based Tourism Strategy 2008–2012* which provides the platform for investment in nature-based tourism product to occur. One of the key initiatives is the State Government's endorsement of a legislative review of the *Crown Land (Reserves) Act 1978* and the *Forests Act 1958* to increase maximum lease terms to 65 years;
- Working with other Government agencies to review the planning framework that applies to regional Victoria for opportunities to provide greater alignment with tourism investment expectations, whilst maintaining the integrity of the environmental and rural considerations; and
- Increasing the current investor pool. One of the key approaches to achieve this is to work with regional stakeholders to identify and develop concept proposals (like the Mildura Riverfront Precinct), which will attract new investor interest.

In recognition of the importance of tourism to regional economic development, the Tourism Task Group (TTG) has been established to identify and facilitate key tourism projects, with a focus on projects that involve Crown land. The TTG comprises senior executives from Tourism Victoria (Chair), Regional Development Victoria, Department of Innovation, Industry and Regional Development, Department of Sustainability and Environment, Department of Planning and Community Development and Parks Victoria.

The Government has undertaken a number of infrastructure initiatives since the release of the *10 Year Tourism and Events Industry Strategy* that have had a positive influence on tourism in the State. The Government provided \$5 million in the 2007–08 State Budget to establish a Regional Aviation Fund to improve regional airports.

Road initiatives such as Eastlink, the Frankston Bypass and the Geelong Ring Road will improve access to the Mornington Peninsula and the Great Ocean Road respectively. The *Moving Forward in Provincial Victoria Statement* provided \$30.3 million to improve regional bus services. This four-year program commenced in 2007 and will improve access to locations such as Portland, Colac, Lakes Entrance, Geelong, Ballarat and Bendigo. Funds have also been provided for further regional upgrades of rail networks.

In recognition of the importance of tourism signing, VicRoads and Tourism Victoria have cooperatively developed new *State-wide Tourist Signing Guidelines* to provide greater clarity to stakeholders about the approval process required to install new tourism road signs.

What will we do in the future?

- Secure investment and infrastructure priorities around Victoria's natural asset base and the tourism strengths of each region.
- Advance priority investment projects identified for each region (as identified in Part B) and work with the respective stakeholders to deliver new product.
- Ensure that tourism projects continue to be a priority in Government investment and infrastructure planning.
- Investigate the possibility of sustained tourism passenger traffic to regional airports.
- Ensure that tourism is considered in all relevant Government investment and infrastructure planning.
- Support the Victorian Government's lead signing agency, VicRoads, to improve tourism signing across the State.

IMPROVING THE SUPPLY & QUALITY OF TOURISM EXPERIENCES CONTINUED

Actions	Timing
Investment attraction	
Attract and facilitate investment in tourism product that is consistent with the natural assets and product strengths of each region.	2009–12
Communicate and promote the new <i>Tourism Investment Guidelines</i> to stakeholders.	2009–10
Facilitate a whole-of-Government approach to realise regional specific priorities through vehicles such as the Tourism Task Group (TTG).	2009–12
Review the planning framework that applies to regional Victoria to identify opportunities that may provide greater alignment with investment objectives, whilst maintaining the integrity of environmental and rural considerations.	2009–10
Implement key recommendations from <i>Victoria's Nature-based Tourism Strategy 2008–2012</i> , particularly in relation to the Crown land leasing terms.	2009–12
Support the Land Bank initiative led by the Department of Sustainability and Environment for development of tourism projects on public land.	2009–12
Infrastructure	
Complete an analysis of regional airports to determine their logistical and commercial capacity for high volume tourism and business traffic.	2009–10
Work with regional stakeholders to deliver infrastructure projects that will leverage new investment in tourism product.	2009–12
Signing	
Progress the implementation of the <i>New Tourism Signing Project: An Integrated Approach to Signing Victoria's Geographic Tourism Destinations of National and International Significance</i> .	2009–12
Develop industry guidelines for: <ul style="list-style-type: none"> • A tourism signing policy template for adoption by Local Government based on the signing guidelines; and • Establishing and managing a regional/local tourism signing committee including case studies of best practice models (e.g. Mornington Peninsula). 	2009–10
Visitor Information Centres	
Work with Tourism Alliance Victoria to ensure a smooth transition to the new Visitor Information Centres Accreditation Guidelines to minimise impact while ensuring ongoing improved customer service.	2009–10
Accessibility	
Complete and implement the <i>Accessible Tourism Plan</i> .	2009–10
Ensure the tourism industry has a greater understanding of the importance of improving access and information for visitors with a disability.	2009–12

INCREASING CONSUMER DEMAND FOR REGIONAL TOURISM EXPERIENCES

Why is this issue important?

Tourism delivers economic, social and environmental benefits to regional Victoria. It can promote and facilitate economic activity that supports various aspects of regional life. Social benefits can include generating community cohesiveness, facilitating regional pride and contributing to the revival of regional towns. Tourism also promotes sustainability through communicating the value of natural and built heritage, providing the incentive for environmental improvements or rehabilitation of areas and raising awareness of environmental issues.

Notwithstanding the above, there are a number of challenges facing regional Victoria. These include the low regional dispersal of emerging inbound markets such as China, India and the Middle East and the need to enhance the range of products, accommodation and infrastructure in regional Victoria.

Although there have been a number of positive results from regional marketing (including the Regional Marketing Program), industry consultations have highlighted a number of issues with the current regional marketing approach such as:

- The Regional Marketing Program has limited capacity to effectively undertake major brand campaigns for all campaign regions, particularly given the cluttered and fragmented media landscape and increasing advertising costs;
- The grant criteria and guidelines associated with the Regional Marketing Program have been difficult for the Regional Campaign Committees to administer. A key issue has been the short-range budget cycle, which has inhibited planning;
- The focus on regional brand awareness campaigns has shifted the emphasis away from tactical activity, which plays an important role in stimulating demand and conversion for tourism businesses;

- The current Regional Marketing Program does not provide funding for activities beyond marketing such as product development;
- It is difficult for the Regional Campaign Committees to achieve high levels of industry buy-in to marketing activity given the small number and small scale of many regional tourism businesses;
- Few regions have been successful in engaging Local Government support to boost funding for brand campaigns;
- There is some confusion about the respective roles of the Regional Campaign Committees and Tourism Victoria in targeting the intrastate market; and
- Industry would like to have greater clarity about the annual marketing plans of Tourism Victoria to enable adequate planning and resource allocation for cooperative activity.

Another key trend which will influence the direction of Victoria's regional tourism marketing program is the growing significance of new technologies in influencing consumer choice. It is critical that the regional tourism industry in Victoria is well positioned to take advantage of the internet and other new technology tools, to achieve growth in both domestic and international visitation.

International Visitor Survey results indicate that 68 per cent of international visitors to Victoria use the internet to research the destination prior to their visit and 43 per cent book at least one component of the trip online⁸. However, many tourism operators in regional Victoria do not use online booking systems and risk missing out on business as consumers move toward online booking of tourism products and services. Although more than 90 per cent of operators listed on visitvictoria.com have websites, less than 16 per cent of operators have online booking facilities.

⁸ International Visitor Survey, Tourism Research Australia, year ending December 2007.

INCREASING CONSUMER DEMAND FOR REGIONAL TOURISM EXPERIENCES CONTINUED

What have we already done?

A significant component of Tourism Victoria's financial and human resources are directed towards regional tourism. These include on-going core activities associated with: investment attraction; product marketing and development; brand marketing; familiarisations; international marketing; public relations; strategy and policy development; research; and e-marketing.

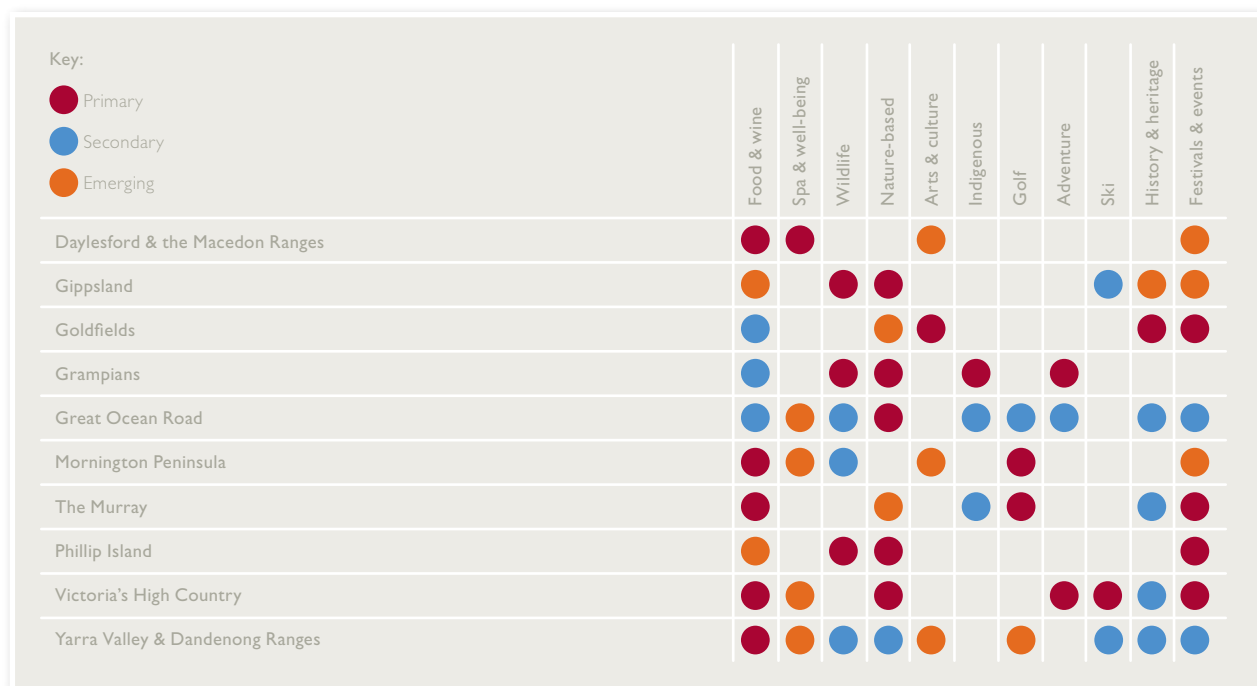
In addition to core funding and activities, the Victorian Government has demonstrated its commitment to increase international and domestic visitation in the regions by providing funding for a range of marketing initiatives. Major initiatives directed specifically to regional marketing include:

- \$13.3 million over four years to help Victoria's ten regional areas to market their regions domestically and facilitate the involvement of industry and Local Government in Tourism Victoria campaigns; and
- Doubling of the Regional Marketing Program to \$6.5 million over two years (due to expire 30 June 2009). This was facilitated by funding provided through the *Moving Forward Provincial Victoria Statement*.

The doubling of the Regional Marketing Program has been important in positioning the unique attractions of each region across the State through the roll-out of brand campaigns. The program provides a coordinated industry and Government approach to regional destination marketing and generated additional cooperative marketing funds, which has helped to boost the budget available for marketing regional Victoria.

A key element of Tourism Victoria's successful marketing strategy has been its *Jigsaw* campaign, which has created a consistent platform for marketing Melbourne and Victoria's regions. A number of Victoria's key experiences and product strengths have been successfully showcased through this platform. According to the latest results from the Brand Health Survey⁹, Victoria leads other Australian states as a destination for consumers to experience quality food and wine, touring by car, events, shopping and theatre. Focusing on the unique product strengths in each of Victoria's regions is an important way to be kept front of mind and to emotionally engage with consumers. The primary product strengths of the regions are noted in figure 5. These are supported by a range of secondary and emerging products strengths which assist to boost the overall appeal of a region and visitor experience.

Figure 5. Product strengths in regional Victoria



⁹ Roy Morgan Research, June 2008.

What will we do in the future?

Regional Marketing Program

Launch an enhanced Regional Marketing Program of \$6 million over three years which will provide the regions with flexibility and autonomy in implementing marketing campaigns. Key elements of the program will be determined in consultation with regional stakeholders and will include:

- An extended three-year funding cycle to enable better planning and budgeting;
- Greater flexibility in implementing regional marketing campaigns. Brand campaigns will no longer be mandated, allowing the regions to shift their focus to tactical activity using tools such as the new online brand guidelines, the regional e-marketing program and fast-art advertising;
- New cost effective opportunities for operators to buy into, with an emphasis on e-marketing;

- Support for the regions to focus their activity on targeting the intrastate market. Tourism Victoria will continue to reach the intrastate segment through its extensive public relations and familiarisations program, as well as online marketing;
- Support for the regions to access and market their destinations internationally;
- Reduced bureaucracy to deliver more cooperative and efficient decision-making processes; and
- Delivery of Annual Tourism Victoria Marketing and Development Plans to enable the regions to more effectively budget and plan for cooperative activity.

Major campaign strategy

Raise awareness of regional destinations, attractions and experiences in Victoria through a new integrated marketing strategy. This will comprise a number of platforms which will provide new leverage opportunities for Victoria's regional tourism industry as noted below:

Villages of Victoria/ spa and well-being campaign

Allocate \$7.3 million over four years for the development of a major new interstate advertising campaign highlighting the village of Daylesford and Victoria's competitive strengths in spa and well-being. The campaign will seek to build interstate awareness of Daylesford as a village dedicated to your well-being. The campaign will provide a state-wide platform to promote the villages of Victoria and will seek to build on the growing consumer interest in spa and well-being tourism. This next phase of the *Jigsaw* campaign will focus on regional Victoria and will provide offerings to the ageing Baby Boomer market as they move toward a greater focus on their own health and well-being. The campaign will hero Daylesford but will be supported by both a 'villages of Victoria' marketing initiative which will highlight the unique personalities of Victoria's village destinations and a 'spa and well-being' marketing initiative that seeks to promote the spa and well-being products that exist in a number of Victoria's regions. The campaign will also provide opportunities for the broader Daylesford and the Macedon Ranges region.

Nature-based tourism campaign

Allocate \$2.1 million over three years for the development of a new joint campaign by Parks Victoria and Tourism Victoria to build awareness of regional Victoria as a nature-based tourism destination in interstate and international markets. The campaign will feature the Great Ocean Walk, but will also promote a range of other nature-based bookable tourism products, national parks and nature-based experiences across regional Victoria.

Continued over...

INCREASING CONSUMER DEMAND FOR REGIONAL TOURISM EXPERIENCES CONTINUED

Food and wine campaign

Allocate \$900,000 over three years to market regional Victoria's strengths in food and wine through a range of activities including promotion of the wine regions of Victoria, regional restaurants and Victorian produce. The food and wine strengths of Victoria's High Country region will be a feature of this campaign activity and will target key interstate markets.

Seasonal theme campaigns

Integrated campaigns will be developed to showcase the product strengths of both Melbourne and regional Victoria in a more coordinated manner on a seasonal basis. These seasonal campaigns will provide a planned structure for the promotion of regional destinations and experiences across the State. The program will be developed in conjunction with the regions to take into account local seasonal needs and opportunities and will provide a platform for all regions to showcase their unique destinations and product strengths. Activities will include:

Autumn – Campaigns featuring Victoria's unique food and wine offerings.

Winter – Victoria will continue to promote its unique ski and winter experiences through dedicated advertising campaigns. Winter will also be the period that Victoria promotes its arts, theatre and cultural heritage product.

Spring – The excitement of the Spring Racing Carnival, fashion and shopping will be featured in spring.

Summer – Victoria will leverage its summer events calendar, including the Australian Tennis Open and will showcase outdoor and coastal experiences in regional Victoria.

Online

Improve Victoria's online presence with a range of new developments which will significantly benefit operators in regional Victoria including:

- Integrate a new booking platform into visitvictoria.com to improve the commercial opportunities available to operators and to expand their audience of potential visitors. Tourism Victoria will work closely with Visitor Information Centres, Regional Tourism Boards (RTBs) and Regional Tourism Associations to ensure a coordinated and mutually beneficial transition to online booking;
- Expand the distribution of Victorian product online by identifying and working with new online partners;
- Further integrate new technologies and diverse communication techniques within the marketing mix to improve consumer awareness of regional destinations and experiences; and
- Facilitate the integration of sub-regional websites into visitvictoria.com.

It will be the joint responsibility of RTBs/Regional Campaign Committees and Tourism Victoria to coordinate online marketing initiatives and to ensure that content included on visitvictoria.com and at a regional level is consistent. RTBs will be able to approve sub-regional websites as the call to action for marketing campaigns provided that operator listings appear on both the sub-regional website and visitvictoria.com. This will allow operators to benefit from the widest possible promotion and most cost effective online distribution of their businesses.

Touring

Touring remains a key strategy in increasing both domestic and international visitation. Although the development and marketing over the life of the Regional Tourism Action Plan will involve a number of touring routes, particular focus will be directed towards Sydney Melbourne Touring and the Great Southern Touring Route. Promotion of touring routes through trade show and wholesaler representation will be encouraged in international markets such as Europe, United Kingdom, New Zealand, North America and India.

Events

Continue to work across Government, in particular with Regional Development Victoria, to provide a consistent approach to tourism and community events. In addition to progressing investment proposals aimed at stimulating business events activity, Tourism Victoria will work with Tourism Alliance Victoria and the Melbourne Convention and Visitors Bureau to review the current approach to attracting business events to regional Victoria.

INCREASING CONSUMER DEMAND FOR REGIONAL TOURISM EXPERIENCES CONTINUED

Actions	Timing
Destination marketing	
Introduce the enhanced Regional Marketing Program and revised grant guidelines. This process will involve: <ul style="list-style-type: none"> • Extensive consultation with Regional Tourism Boards (RTBs)/Regional Campaign Committees to determine an agreed approach to the revised program; • Distribution and communication of the revised <i>Regional Marketing Program Guidelines</i>; and • Meetings with RTBs/Regional Campaign Committees to discuss the proposed direction of each region's marketing strategy to provide greater assistance and cooperation during planning. 	2009–10
Develop and launch the major Daylesford, villages of Victoria/spa and well-being campaign.	2009–10
Develop and launch the new nature-based marketing campaign.	2009–10
Implement the new seasonal marketing program, highlighting key product strengths and destinations in regional Victoria throughout the year.	2009–10
Develop fly/drive campaigns to promote visitation to regional Victoria.	2009–11
Continue the marketing of regional Victoria's food and wine strengths.	2009–12
Deliver Annual Tourism Victoria Marketing and Development Plans to stakeholders to enable industry to more effectively plan for and participate in marketing and related initiatives.	2009–12
Leverage opportunities from Tourism Australia's National Landscapes initiative to promote key regions internationally such as the Murray, Gippsland, Victoria's High Country and Great Ocean Road.	2009–10
E-Marketing	
Enhance the capabilities of visitvictoria.com by integrating online booking.	2009–10
Develop a new online booking, training and education program for regional operators.	2009–10
Ensure consistency of visitvictoria.com and regional website content and product listings.	2009–10
Encourage regional operators to take up online distribution opportunities.	2009–12
Touring/Alliance marketing	
Further develop Sydney Melbourne Touring (including the Sydney–Melbourne Coastal Drive, Capital and Country Touring Route and the Great Alpine Road).	2009–12
Provide further assistance to the Great Southern Touring Route, particularly for targeting key international markets.	2009–12
Events	
Work with regional event organisers, RTBs, Regional Tourism Associations and Local Government to improve the quality of regional events and associated marketing activities.	2009–12
Continue to work with the Victorian Major Events Company to attract world-class major events to regional Victoria.	2009–12
Continue to work with Regional Development Victoria to maximise the benefits of regional events.	2009–10
Work closely with Tourism Alliance Victoria, the Victorian Tourism Industry Council, the Melbourne Convention and Visitors Bureau and Local Government to attract business events to regional Victoria.	2009–12
Research	
Work with the Regional Research Group (includes representation from all regions) to deliver key research projects including: <ul style="list-style-type: none"> • An investigation into consumer decision making processes/collateral use; and • The biennial <i>Regional Awareness and Perceptions Study</i>. 	2009–12

ADDRESSING SKILLS, SERVICE STANDARDS & ENVIRONMENTAL SUSTAINABILITY

Why is this issue important?

Skilled labour is critical to the delivery of quality tourism experiences. Without adequate numbers of appropriately skilled workers, it will be difficult for regional Victoria to increase its share of high yield tourists and realise potential growth.

Labour and skills shortages are particularly noticeable in regional Victoria, where competition for labour is high and staff retention is difficult. This is accentuated by seasonality issues, distance and a lack of suitable accommodation which makes it hard to recruit and keep trained and experienced staff.

As global competition for the tourist dollar increases, travellers have become more discerning about the experiences they require and have higher expectations about the standards of service they receive.

An important factor in improving Victoria's tourism offerings is the future impacts of climate change and crises, especially the issue of drought. Anecdotal evidence suggests that only a small proportion of tourism businesses in regional Victoria have adopted sustainable practices and are appropriately equipped to respond to and recover from crises.

What have we already done?

Tourism Victoria has led the implementation of the Tourism Excellence Program to assist the industry to improve service standards and business practices. The program has focused on several key areas including: industry training; sustainability; the uptake of accreditation and awards programs; monitoring customer satisfaction; and industry benchmarking.

Tourism Victoria has a product development unit which assists tourism operators to improve their business operations. A key component of this activity has been the International Mentoring Program which commenced in 2007 to assist business entry into international markets.

Tourism Victoria has also undertaken or supported a number of activities in response to the sustainability challenge, including promoting industry standards and accreditation (e.g. Green Globe 21) and rewarding environmental sustainability through the Eco-Certification and Better Business recognition programs.

Victoria is currently working closely with other States and Territories and the Commonwealth to address the tourism challenges of climate change and has developed a *Crisis Communications Handbook* to assist regional tourism bodies to plan for crises.

What will we do in the future?

- Launch an expanded Tourism Excellence Program supported by funding of \$650,000 over two years from the Government's *Moving Forward: Update – The Next Two Years 2008 to 2010*. The program will help to fill gaps in tourism products and will assist with skills development. A key element of the new program will be a grants initiative for the regions to undertake specialist training activities and tourism audits.
- Finalise and implement the *Workforce Development Plan* which will include practical solutions for regional Victoria to address skills and staff shortage issues.
- Investigate opportunities to mitigate, adapt and respond to the impacts of climate change on Victoria's tourism industry, particularly in relation to sustainable water usage and drought.
- Develop new resources to assist regional tourism businesses to more effectively prepare and respond to crises.

ADDRESSING SKILLS, SERVICE STANDARDS & ENVIRONMENTAL SUSTAINABILITY CONTINUED

Actions	Timing
Tourism excellence	
<p>Expand the Tourism Excellence Program. This will incorporate five key initiatives:</p> <ul style="list-style-type: none"> • Grants programs, where funding is provided directly to Regional Tourism Boards (or Regional Campaign Committees in their absence) to undertake an agreed skills development program in the region. Content may include leadership/mentoring programs (in line with the successful Gippsland Leadership Program), or workshops based on the Tourism Excellence modules such as research, sustainability, people management, business planning, pricing/packaging, international marketing, e-marketing and working with the media; • Grants for tourism audits to benchmark and monitor the quality of tourism services provided by regional operators through mystery shopper visits; • A Market Ready Program to assist tourism businesses to introduce new products and become more commercially viable; • An expanded International Mentoring Program to assist priority tourism products to accelerate their entry into export markets (product participants will be increased from twelve to twenty); and • Enhanced product development advisory services to assist businesses in starting up/improving their operations with a key focus on making regional businesses more commercially viable. New services will include online business factsheets. 	2009–10
Support regional tourism operators' participation in the Victorian Tourism Awards to improve business professionalism and standards and increase marketing and promotion of the event.	2009–12
Support the new <i>National Accreditation Framework</i> and assist in the implementation of the new accreditation scheme in Victoria.	2009–12
Host regional tourism managers at quarterly forums to share information, discuss key issues and provide new insights about regional tourism development.	2009–10
Workforce development	
<p>Complete the <i>Workforce Development Plan</i> in consultation with other Government agencies. This will involve:</p> <ul style="list-style-type: none"> • Identifying impediments to workforce participation in the tourism sector and potential barriers to growth; • Generating solutions to address the short and long-term workforce issues facing the Victorian tourism industry including attracting staff to the sector; retention of staff, establishment/promotion of long-term career paths in tourism and the utilisation of alternative labour markets (e.g. skilled migration, mature workers, the unemployed etc); • Ensuring there are sufficient opportunities for students to undertake tourism and hospitality training across the State, particularly within the reformed TAFE sector in Victoria (the Government announced in August 2008 that it will create more than 170,000 new TAFE places in the State); and • Investigating new opportunities to work with other Government agencies and industry bodies to address skills shortages in the tourism sector and to improve Government responsiveness to industry needs. 	2009–10
Environmental sustainability	
Undertake further strategic planning to assess the implications of climate change on the Victorian tourism industry.	2009–12
Prepare a <i>Sustainable Tourism Action Plan</i> based on three key themes: sustainable destinations, sustainable enterprises and sustainable visitors.	2009–10
Work with other agencies to ensure that tourism objectives are considered in relevant sustainability plans and activities to address climate change across Government.	2009–12
Implement actions arising from the national cross-government and industry plan on climate change.	2009–10
Develop new sustainability content for Tourism Victoria's corporate and consumer websites including information on climate change issues, visitor environmental guidelines and information on green tourism businesses.	2009–10
Develop an updated <i>Crisis Communications Handbook</i> for tourism businesses to help plan for, respond to and recover from crisis events.	2009–10

PART B: SUPPORTING TOURISM GROWTH IN VICTORIA'S REGIONS

Specific challenges and priorities for each region



The following priorities have been identified in the development of the Regional Tourism Action Plan; industry structures, investment attraction, destination marketing and skills and service standards. For the purpose of identifying specific actions for each region these priorities have been refined as follows:

1. Industry structures

Consistent with the direction outlined in Part A, Tourism Victoria will focus on working with stakeholders at a regional level. The effectiveness of structures below this will need to be addressed at the local level.

2. Investment and infrastructure

A number of priority investment and infrastructure projects have been identified for each region. Most of the initiatives in this section are aspirational and their delivery is contingent upon a range of factors. The private sector has an important role to play in delivering these projects.

3. Marketing

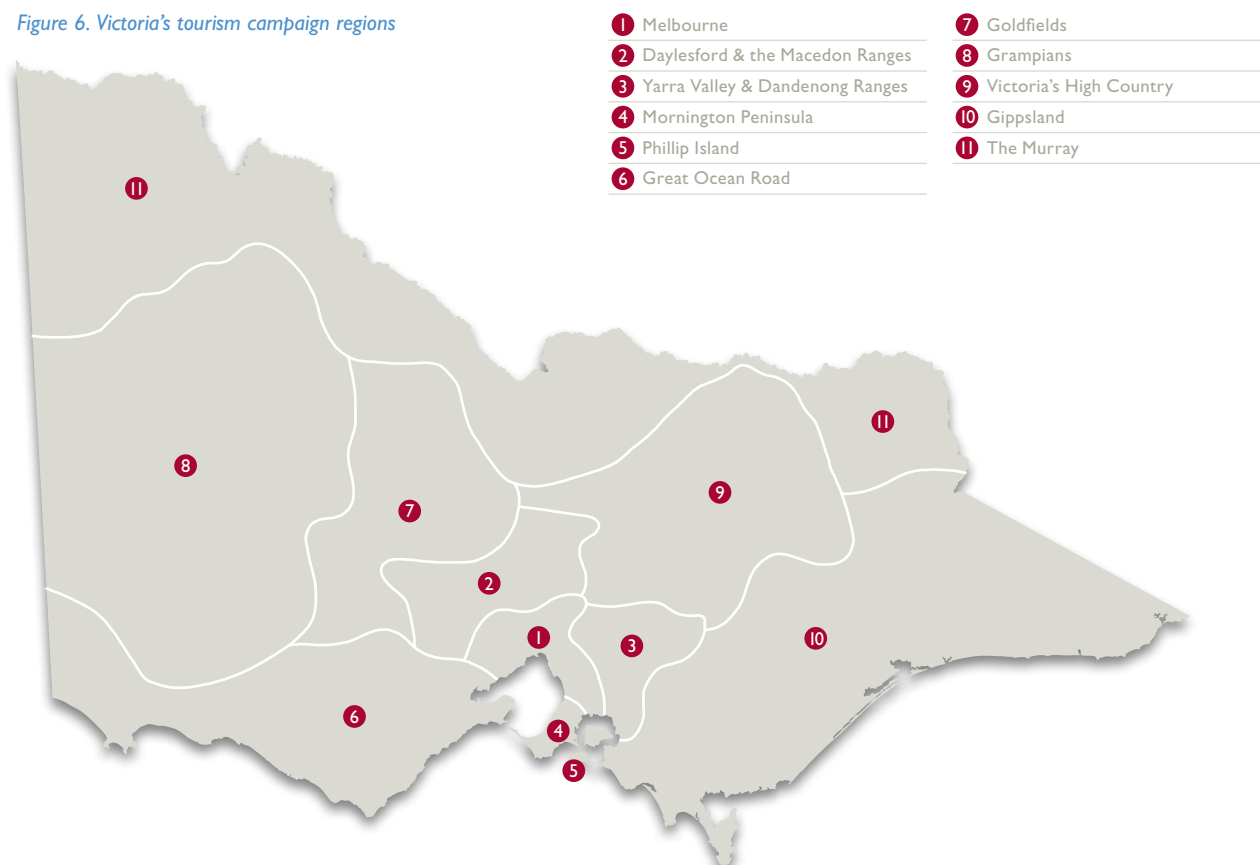
A new integrated marketing strategy which provides opportunities for each region to leverage their brand positioning and product strengths will be implemented.

4. Business development

There are a broad range of skills and service standard issues that need to be addressed across the State as outlined in Part A. The region specific priorities in this section refer to business development and include issues such as developing skills in international marketing and improving product offerings.

This section will include actions for each region under the priority headings outlined above. The actions identified will assist in realising the broad strategies outlined in Part A.

Figure 6. Victoria's tourism campaign regions



PRIORITIES FOR DAYLESFORD & THE MACEDON RANGES

Daylesford and the Macedon Ranges has become increasingly diversified in recent years and sectors such as the arts, retailing, food, wine and health and community services are rapidly growing components in the local economy. Through the unique reserves of mineral springs and proximity to Melbourne, Daylesford and the Macedon Ranges is well placed to maximise its position as a tourism destination.

Respondents in the *Regional Awareness and Perceptions Study 2007* clearly identified the region with spas, mineral springs and health treatments followed by boutique accommodation and indulgence or romance.

The region has considerable depth of mineral springs and world-class spa resorts and facilities. To leverage the region's strength in well-being and rejuvenation, Daylesford will be the hero destination in the new major interstate regional campaign. This campaign will focus on positioning regional Victoria as a leading destination in spa and well-being and will showcase the unique villages on offer.

The major opportunities for tourism development in Daylesford and the Macedon Ranges are:

- Continuing to develop high quality, large capacity accommodation; and
- Expanding activities aimed at attracting international visitors.

Actions	Timing
Industry structures	
Create a new Regional Tourism Board in co-operation with local stakeholders that takes on a broader role than marketing, including industry and product development.	2009
Investment and infrastructure	
Tourism Victoria will work with State Government agencies, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects: <ul style="list-style-type: none"> • High quality accommodation with large capacity integrated with spa and well-being product; • Boutique accommodation integrated with food, wine, spa and well-being products, with a particular focus on opportunities in strategic locations; and • Develop tourism product associated with natural mineral water. 	2009–12
Marketing	
Hero Daylesford as a village dedicated to your well-being in a new interstate campaign.	2009–12
Support expanding offerings such as food and wine that complement the region's strengths in villages and spa and well-being.	2009–12
Maximise the region's proximity to Melbourne through greater participation in international marketing activities, with a focus on the New Zealand market.	2009–12
Business development	
Assist and participate in interactive workshops to expand industry understanding of e-marketing opportunities.	2009

PRIORITIES FOR GIPPSLAND

Gippsland has diverse economic drivers with agriculture, manufacturing and energy sectors making significant contributions to the local economy. Tourism has not traditionally had a major focus in the region however, it is gaining an increasing profile as it is viewed as a sector with the potential for economic growth.

Respondents in the *Regional Awareness and Perceptions Study 2007* clearly identified Gippsland destinations with the attributes of recreation and sport, family destination and natural attractions.

Gippsland is seen as a region with great potential, especially if it can increase the awareness of its nature-based experiences. The *Inspired by Gippsland* campaign, aimed at intrastate and interstate markets complements this approach by focusing on diverse and inspiring nature experiences and the benefits of discovering Gippsland. The region's prominence in *Victoria's Nature-based Tourism Strategy 2008–2012* and acknowledgment of product at a national level through Tourism Australia's National Landscapes initiative is further recognition of its nature-based experiences.

The major opportunity for tourism development in Gippsland is supporting investment that enhances nature-based experiences.

Actions	Timing
Industry structures	
Work with the Regional Tourism Board to identify opportunities to improve industry knowledge and participation in marketing initiatives, product networking and business development programs.	2009–12
Investment and infrastructure	
Tourism Victoria will work with State Government agencies, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects: <ul style="list-style-type: none"> • Blue water access at Bastion Point (subject to completion of the Environment Effects Study) and nature-based accommodation in identified sites in the region; • Gippsland Lakes boating infrastructure – upgrading of boating facilities at selected locations on Victoria's largest inland waterway. Key initiatives would include further development of key sites and tie-up points, particularly towards the western end of the Lakes with appropriate supporting infrastructure, accommodation and services. • High priority nature-based tourism product opportunities associated with long distance trails such as Wild Walks, including eco-cabins in Crown land locations; and • Accommodation integrated with conference and meeting facilities. 	2009–12
Work with the region to realise the Sydney–Melbourne Coastal Drive as a nationally significant touring route by assisting with the National Tourism Signing Reference Group application.	2009
Marketing	
Leverage the positioning achieved through the <i>Inspired by Gippsland</i> campaign.	2009–12
Work in partnership with Tourism Australia and the Steering Committees of the Australian Alps and Australia's Coastal Wilderness National Landscapes to leverage the region's inclusion in the National Landscapes initiative.	2009–12
Enhance the region's involvement in international marketing activities through initiatives associated with Sydney Melbourne Touring.	2009–12
Investigate opportunities for the new Gippsland Hinterland Allwheel Drive Touring Route.	2009–12
Leverage the new nature-based tourism campaign by reinforcing the region's outdoor experiences.	2009–12

PRIORITIES FOR GOLDFIELDS

Goldfields is Victoria's premier heritage region, with the legacy of the gold rush still evident amongst a diverse industry base. Agriculture, viticulture, information technology and tourism are all important drivers for this thriving economy.

Respondents in the *Regional Awareness and Perceptions Study 2007* clearly identified Goldfields with the attribute of history and heritage.

The region needs to continue to leverage off its strengths in culture, history and heritage to maximise future tourism activity while highlighting more contemporary offerings available in the region.

A new campaign is currently in development that will assist in broadening the consumer's perception of Goldfields.

The major opportunity for tourism development in Goldfields region is continuing to invest in new and existing cultural, history and heritage infrastructure.

Actions	Timing
Industry structures	
Evolve to a Regional Tourism Board in co-operation with local stakeholders that takes on a broader role than marketing, including industry and product development.	2009–10
Investment and infrastructure	
Tourism Victoria will work with State Government agencies, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects: <ul style="list-style-type: none"> • Development of a hotel associated with Sovereign Hill; • Tourism infrastructure and product to capitalise on the following opportunities in Bendigo – Chinese precinct, gallery expansion, high quality accommodation integrated with conference facilities and championship golf; • Tourism infrastructure and product to capitalise on the following opportunities in Ballarat – Arts and Cultural Precinct, Lake Wendouree infrastructure and high quality accommodation integrated with conference facilities; • Boutique accommodation associated with heritage, culture, arts and food and wine product; and • Tourism infrastructure and product to support the Great Dividing Trail, including accommodation. 	2009–12
Marketing	
Leverage the positioning achieved through the new Goldfields campaign.	2009–12
Utilise Bendigo's high quality infrastructure and reputation as a cultural tourism destination to develop a sustainable cultural event(s).	2009
Leverage the region's proximity to Melbourne through greater participation in international marketing activities through initiatives associated with the Great Southern Touring Route.	2009–12
Highlight the arts, theatre and cultural links of Melbourne and the Goldfields region. A focus will be to investigate opportunities to leverage the major exhibitions and cultural positioning of Melbourne.	2009–12
Business development	
Investigate packaging the art galleries and museums in the region.	2009–12
Continue to maximise the strategic relationship with the City of Ballarat and City of Bendigo.	2009–12
Investigate opportunities to develop food and wine product in the region.	2009–12
Support the region in its application for a World Heritage Listing for the Castlemaine Diggings National Heritage Park.	2009–12

PRIORITIES FOR GRAMPIANS

The Grampians region is full of spectacular beauty and environmental value with the magnificent Grampians National Park and neighbouring parklands. However, over recent times the region has had to overcome natural crises through bushfires and drought. This has presented a challenge for the overall economy, especially the tourism and agriculture sectors.

The *Regional Awareness and Perceptions Study 2007* found there was no one clear attribute identified for the region, with the most prominent experiences associated with Grampians being natural attractions, adventure and recreation and sport.

The *Grampians Space to Think* campaign was designed to give consumers a greater sense of the spiritual nature of the region, however in order to extend the campaign's appeal to other key markets a refreshed *The Grampians Space to Breathe* campaign has been developed.

The major opportunities for tourism development in the Grampians region are:

- Leveraging off the Grampians region being identified as a priority in *Victoria's Nature-based Tourism Strategy 2008–2012* to realise investment attraction, product development and marketing priorities;
- Enhancing engagement of local industry through the new Regional Tourism Board; and
- Increasing industry participation in and ownership of major marketing campaigns.

Actions	Timing
Industry structures	
Work with the Regional Tourism Board to identify opportunities to improve industry knowledge and participation in marketing initiatives, product marketing and business development programs.	2009–12
Investment and infrastructure	
Tourism Victoria will work with State Government agencies, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects: <ul style="list-style-type: none"> • Tourism infrastructure and product, including high quality boutique and accommodation, to support the proposed Grampians Long Distance Trail; • Nature-based and adventure tourism infrastructure and product including walking and bicycle trails to capitalise on the region's natural assets; • Accommodation associated with food and wine product; and • Development of visitor accommodation and tourism facilities at Mount Arapiles. 	2009–12
Marketing	
Leverage the positioning achieved through the refreshed <i>The Grampians Space to Breathe</i> campaign.	2009–12
Enhance the region's involvement in international marketing activities through initiatives associated with the Great Southern Touring Route.	2009–12
Business development	
Improve linkages between indigenous and nature-based tourism experiences.	2009–12

PRIORITIES FOR GREAT OCEAN ROAD

With internationally recognised landscapes, the Great Ocean Road region is of considerable environmental and cultural significance to the State. Natural diversity is a key motivator for the tourism intensive economy, which is complemented by well-established primary and agricultural industries.

Respondents in the *Regional Awareness and Perceptions Study 2007* clearly identified Great Ocean Road (including Geelong and the Bellarine Peninsula) with natural attractions followed by a family destination and boutique accommodation.

Great Ocean Road is a very important region in positioning the State across a number of priority markets. It is integral to key strategies including the realisation of increased international visitation and nature-based tourism. This is consistent with the Great Ocean Road *Nature's invigorating journey* campaign which targets key interstate markets

by encouraging visitors to leave behind the stresses of everyday life by spending time relaxing and revitalising along its natural stretch of therapy. This is complemented by the Geelong and the Bellarine Peninsula *Come back down to earth* campaign which aims to build upon awareness of key intrastate markets by highlighting its down-to-earth nature and lack of pretension.

The major opportunities for tourism development in the Great Ocean Road region are:

- Building upon the supply of high quality tourism product that enhances nature-based and touring experiences;
- Encouraging visitor dispersal and yield across the region; and
- Realising the priority actions in *Victoria's Nature-based Tourism Strategy 2008–2012*.

Actions	Timing
Industry structures	
Evolve to a Regional Tourism Board in co-operation with local stakeholders that takes on a broader role than marketing, including industry and product development.	2009–10
Investigate the current alignment of Geelong and Bellarine Peninsula with the Great Ocean Road campaign region.	2010–11
Investment and infrastructure	
<p>Tourism Victoria will work with State Government agencies, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects:</p> <ul style="list-style-type: none"> • Nature-based tourism infrastructure and product including the development of iconic trails to support the region's natural assets such as the Great Otway National Park and Great Ocean Walk; • Great Ocean Road Interpretative Centre – a world-class interpretative centre which could incorporate multi-media experiences, visitor information and regional food and wine product; • Development of tourism product associated with surf culture; • Support development of Avalon as an international airport; • Redevelopment of the Apollo Bay Harbour – upgrading of tourist and community facilities at the harbour's edge, incorporating improved boating facilities, high quality accommodation, visitor information, retail and food and wine product; • Geothermal Bathhouse developments including Port Fairy; • High end accommodation, both large scale and boutique, at key locations along the Great Ocean Road to induce overnight visitation and capitalise on the natural assets of the region; • Delivery of the ex-HMAS Canberra as a world-class dive site attraction; • Implementation of the Portarlington Safe Boat Harbour Master Plan to facilitate the delivery of tourist and community facilities including accommodation; 	2009–12

PRIORITIES FOR GREAT OCEAN ROAD CONTINUED

Actions continued	Timing
Investment and infrastructure continued	
<ul style="list-style-type: none"> • The ongoing development of the Flagstaff Hill precinct as a major attraction linked to the Great Ocean Road; • Support Local Government's delivery of the <i>Portland Bay Coastal Infrastructure Plan</i>; • Explore the potential for future development at Tower Hill; • Facilitate development of the Geelong Waterfront Precinct including a Geothermal Bathhouse development at Eastern Beach Geelong and implementation of the Geelong Marine Industry Precinct; and • Convention/conference facilities in Geelong. 	2009–12
Marketing	
Leverage the focus on Great Ocean Road, bushwalking and the Great Ocean Walk as the respective hero destination, activity and product in the new nature-based campaign.	2009–12
Leverage the positioning achieved through the Great Ocean Road <i>Nature's invigorating journey</i> campaign.	2009–12
Leverage the positioning achieved through the Geelong and the Bellarine Peninsula <i>Come back down to earth</i> campaign.	2009–12
Increase marketing presence of Great Ocean Road in interstate markets through trade and corporate partnerships.	2009–12
Work in partnership with Tourism Australia and the Steering Committee of The Great Ocean Road to leverage the region's inclusion in the National Landscapes initiative.	2009–12
Leverage the proximity of Avalon Airport through co-operative marketing activities.	2009–12
Continue to enhance the region's appeal to international markets through involvement with initiatives such as those associated with the Great Southern Touring Route.	2009–12
Business development	
Work with relevant government agencies such as Parks Victoria to realise the direction of <i>Victoria's Nature-based Tourism Strategy 2008–2012</i> .	2009–12
Support Great Ocean Road as a benchmark in sustainable tourism development.	2009–12

PRIORITIES FOR MORNINGTON PENINSULA

Strong primary industry sectors make significant contributions to the Mornington Peninsula economy. The complementary industry base of horticulture, market gardening, vineyards and poultry farming confirms the reputation of Mornington Peninsula being a premier food and wine destination.

The *Regional Awareness and Perceptions Study 2007* found there was no one clear attribute identified for the region, with the most prominent associations for Mornington Peninsula being golf, family destination and food and wine.

The Mornington Peninsula. Seriously, it's in Australia. campaign aims to position the region as a little piece of Europe in Australia to key interstate markets. The campaign is set to build awareness of the region and maximise visitation during non-peak periods. Strong industry led participation in domestic and international marketing activities places the region in a good position to maximise recent visitation growth.

The major opportunity for tourism development on the Mornington Peninsula is realising investment and supporting infrastructure priorities that enhance water-based and food and wine experiences and leverage the region's enhanced commercial viability due to its proximity to Melbourne.

Actions	Timing
Industry structures	
Evolve to a Regional Tourism Board in co-operation with local stakeholders that takes on a broader role than marketing, including industry and product development.	2010–11
Investment and infrastructure	
Tourism Victoria will work with State Government agencies, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects: <ul style="list-style-type: none"> • Safe boat harbours and boating facilities, with a particular focus on facilitating the Frankston Safe Boat Harbour project and other marina developments; • High quality branded accommodation of large capacity integrated with a regional conference facility; • Cowes – Stony Point Passenger-Car Ferry project; and • Tourism infrastructure and product including high quality accommodation, conferencing and marine infrastructure as part of the transfer to the State and the recognition of Point Nepean as a key asset and attraction. 	2009–12
Marketing	
Leverage the positioning achieved through <i>The Mornington Peninsula. Seriously, it's in Australia.</i> campaign.	2009–12
Maximise the region's proximity to Melbourne through greater participation in international marketing activities with initiatives such as those associated with Sydney Melbourne Touring and Melbourne's South East Touring Route. A key focus will be the New Zealand, United Kingdom and North America markets.	2009–12
Leverage the new interstate regional campaign's focus on spa and well-being experiences.	2009–12
Position Mornington Peninsula to be a key focus of the spring and summer campaigns.	2009–12
Continue to market golf product in the region.	2009–12

The Murray has strong primary industries such as horticulture and viticulture sectors while cereal, cattle and wool are productive in the dryland areas. Growing tourism, wine, agroforestry and olive oil industries complement the region's reputation for quality food and wine.

The *Regional Awareness and Perceptions Study 2007* found there was no one clear attribute identified for the region however, the most prominent association with the Murray was golf, ahead of history and heritage and food and wine.

The Murray River. Wind Down. campaign leverages the iconic strength of the Murray River and is aimed at positioning the region as a destination to relax and unwind. Managing visitor expectations will be essential and activities will need to address the misconceptions of being able to boat and

drive along the entire Murray River. The size of the region and the need to engage other States can also raise issues with the coordination of activities.

The major opportunities for tourism development in the Murray are:

- Improving industry understanding of how it can leverage *The Murray River. Wind Down.* campaign;
- Gaining united vision across state tourism organisations;
- Realising new and refreshed infrastructure along the Murray River; and
- Consideration of outcomes from Victorian Environmental Assessment Council recommendations.

Actions	Timing
Industry structures	
Create a new Regional Tourism Board in co-operation with Tourism New South Wales and local stakeholders that takes on a broader role than marketing, including industry and product development.	2009
Co-operatively develop a General Service Agreement that is agreed by industry, Tourism New South Wales and Tourism Victoria.	2009
Investment and infrastructure	
Tourism Victoria will work with State Government agencies, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects: <ul style="list-style-type: none"> • High quality accommodation with large capacity integrated with a regional conference facility (Mildura, Wodonga and Yarrawonga); • Nature-based infrastructure and investment product along the Murray River, including consideration of a river trail with appointed visitor accommodation (similar to the Great Ocean Walk model); • Tourism infrastructure and product to support the Port of Echuca as a heritage port and Swan Hill Pioneer Settlement; • Implementation of the Mildura Riverfront Master Plan to create a riverside tourism precinct that integrates the Mildura CBD with the Murray River and marina; and • Completion of Bonegilla Migrant Centre experience. 	2009–12
Marketing	
Leverage the positioning achieved through <i>The Murray River. Wind Down.</i> campaign.	2009–12
Enhance research to incorporate visitation data from both Victoria and New South Wales.	2009
Undertake initiatives that support destinations to leverage the overall <i>The Murray River. Wind Down.</i> campaign e.g. Shepparton.	2009–10
Support the Murray River and Mungo National Park inclusion in Tourism Australia's National Landscapes initiative.	2009–10
Enhance the region's involvement in international marketing activities through initiatives such as Sydney Melbourne Touring.	2009–12
Leverage the new interstate regional campaign by reinforcing village experiences within the region.	2009–12
Business development	
Work with destinations such as Shepparton and Nagambie to determine how they can better leverage Tourism Victoria and regional activities.	2009

PRIORITIES FOR PHILLIP ISLAND

The outlook for Phillip Island's economy is bright with expected development and population growth. This has significant ramifications for Phillip Island such as increases in permanent and holiday populations on the island, rising road traffic levels, and increased pressures on the land under Phillip Island Nature Park's protection.

The *Regional Awareness and Perceptions Study 2007* found there was no one clear attribute identified for the region however, the most prominent association with Phillip Island was wildlife ahead of natural attractions and family destination.

The *Phillip Island. Real Entertainment* campaign positions the region as a destination providing a wide range of nature-based activities and aims to reinforce its close proximity to Melbourne. The region will be well placed to further leverage its proximity to Melbourne with the proposed long-term Cowes-Stony Point ferry development creating an important access link to the Island.

The major opportunities for tourism development on Phillip Island are:

- Enhancing access to the region; and
- Increasing year-round appeal in key markets.

Actions	Timing
Industry structures	
Evolve to a new Regional Tourism Board in co-operation with local stakeholders that takes on a broader role than marketing, including industry and product development.	2010–12
Investment and infrastructure	
Tourism Victoria will work with State Government, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects: <ul style="list-style-type: none"> • Ongoing development of high quality accommodation facilities linked to Phillip Island's key attractions including world championship golf facilities and the racetrack. This will build on the success of developments such as the Silverwater Resort at San Remo; • Infrastructure upgrades of the Phillip Island nature parks and associated private sector investment opportunities; and • Cowes – Stony Point Passenger-Car ferry service project. 	2009–12
Marketing	
Leverage the positioning achieved through the <i>Phillip Island. Real Entertainment</i> campaign.	2009–12
Investigate marketing initiatives to expand shoulder periods in key markets.	2009–12
Maximise the region's proximity to Melbourne through greater participation in international marketing activities through initiatives such as Sydney Melbourne Touring and Melbourne's South East Touring Route. A key focus will be the China, United Kingdom and North America markets.	2009–12

PRIORITIES FOR VICTORIA'S HIGH COUNTRY

Victoria's High Country has a tourism intensive economy with a high proportion of tourism related businesses contributing to local employment. Growth in supplementary sectors such as agribusiness, access to an expanding road network and inclusion in Tourism Australia's National Landscapes initiative, positions Victoria's High Country to be able to maximise tourism activity in the region.

The *Regional Awareness and Perceptions Study 2007* found there was no one clear attribute identified for the region however, the most prominent associations were recreation and sport, natural attractions and food and wine.

The region has recovered from intense bushfire and drought seasons with new investment and strengthened

food and wine collaboration. The new Victoria's High Country *Adventures Happen* campaign aims to highlight the region's distinctive visitor appeal which encompasses: gourmet food and wine; history; spectacular scenery; and outdoor experiences. In conjunction with the alpine resorts, a winter *Victoria's Snowfields. Never Come Down* campaign has been developed which focuses on the unique Victorian alpine strength of the villages above the snowline.

The major opportunities for tourism development in Victoria's High Country are:

- Improving consumer awareness of the year-round tourism experiences; and
- Assisting the facilitation of new investment to build its appeal as a year-round destination.

Actions	Timing
Industry structures	
Evolve to a new Regional Tourism Board in co-operation with local stakeholders that takes on a broader role than marketing, including industry and product development.	2009–10
Investment and infrastructure	
Tourism Victoria will work with State Government agencies, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects: <ul style="list-style-type: none"> • Redevelopment of the Mount Buffalo Chalet; • Nature-based infrastructure and investment product linked to adventure tourism product, including consideration of an alpine trail with associated visitor accommodation (e.g. the Mount Hotham and Falls Creek Wild Walk); • High quality accommodation and tourism product in Mount Hotham Village, Falls Creek Alpine Resort and Mount Buller; • High Altitude Training Centre at Falls Creek Alpine Resort; • Boutique accommodation associated with food and wine product; • Ned Kelly Interpretation Centre – Stage 2 Glenrowan Precinct; and • Completion of key rail trail and cycle tourism projects including the Murray to Mountains Rail Trail. 	2009–12
Marketing	
Leverage the positioning achieved through the Victoria's High Country <i>Adventures Happen</i> campaign.	2009–12
Continue the <i>Victoria's Snowfields. Never Come Down</i> campaign with a focus of targeting key interstate markets.	2009–12
Work in partnership with Tourism Australia and the Steering Committee of the Australian Alps to leverage the region's inclusion in the National Landscapes initiative.	2009–12
Enhance the region's involvement in international marketing activities through initiatives associated with Sydney Melbourne Touring (including the Great Alpine Road).	2009–12
Leverage the featuring of the region in the new interstate food and wine campaign by reinforcing the region's food, restaurant and winery experiences.	2009–12
Leverage the new interstate regional campaign by reinforcing the region's village experiences.	2009–12
Business development	
Work with the alpine resorts to improve on-mountain product and year-round visitation. A key focus will be the implementation of the <i>Non Winter Nature-based Tourism Destination Development Study for the Victorian Alpine Resorts</i> . A priority product for development will be an epic mountain bike ride at Mount Buller/Mount Stirling as part of the National Landscapes initiative.	2009–12
Work with industry and relevant government agencies to realise the direction of the <i>Alpine Resorts 2020 Strategy</i> .	2009–12

PRIORITIES FOR YARRA VALLEY & DANDENONG RANGES

The Yarra Valley and Dandenong Ranges region is strategically placed as an activity centre close to Melbourne. The rich soil, industrial developments and secondary services create a diverse industry base. A large proportion of the region is rural land, which hosts a vibrant array of horticultural and tourism-related industries.

Respondents in the *Regional Awareness and Perceptions Study 2007* clearly identified the region with food and wine and wildlife, followed by boutique accommodation, gardens and parks and indulgence and romance.

The development of the hallmark *Melbourne's Yarra Valley – You'll Never Want to Leave* campaign in 2003 has positioned the region as Victoria's premier food and wine destination and the campaign has continued to positively influence consumer awareness and perception in key interstate markets. The *Dandenong Ranges – Visit Make Believe* campaign complements the Yarra Valley campaign and seeks to extend visitation by positioning the region as a secluded, stylish, fresh and natural haven to recharge in.

The major opportunity for tourism development in the Yarra Valley and Dandenong Ranges region is facilitating large capacity, high quality accommodation infrastructure developments.

Actions	Timing
Industry structures	
Evolve the tourism industry board in co-operation with local stakeholders to take on a broader role than marketing, including industry and product development.	2010–11
Investment and infrastructure	
Tourism Victoria will work with State Government agencies, the Regional Tourism Board, Local Government, investors and industry to facilitate the following priority projects: <ul style="list-style-type: none"> • High quality large capacity accommodation, potentially integrated with a regional conference facility; • Reinvestment in the Puffing Billy Railway and new investment in associated business opportunities; • Tourism infrastructure and product to support the development of the Lilydale-Healesville Rail Corridor; • Nature-based and adventure tourism infrastructure and product including walking and bicycle trails to capitalise on the region's natural assets; • Boutique accommodation associated with nature-based attractions and food and wine product; and • Improved transportation access to the region. 	2009–12
Marketing	
Leverage the positioning achieved through the <i>Melbourne's Yarra Valley – You'll Never Want to Leave</i> campaign.	2009–12
Leverage the positioning achieved through the <i>Dandenong Ranges – Visit Make Believe</i> campaign.	2009–12
Maximise the region's proximity to Melbourne through greater participation in international marketing activities through initiatives associated with Melbourne's South East Touring Route. A key focus will be the New Zealand and United Kingdom markets.	2009–12
Leverage focus in autumn campaigns by reinforcing food and wine experiences.	2009–12

How can we measure if the Regional Tourism Action Plan has made a difference?

Tourism Victoria will implement a monitoring and evaluation program to assess changing environmental conditions and performance that may impact the directions of the Plan. This will provide input to determine whether the implementation course should be adjusted or whether strategic changes may be warranted, to improve their relevance and effectiveness to drive regional tourism growth.

A key element of the monitoring program will be the delivery of an Annual Regional Report Card on how we are tracking in achieving the key milestones in the Plan. This will be available to industry on Tourism Victoria's corporate website tourism.vic.gov.au.

What targets will be used to assess changes in regional visitation?

Tourism Victoria has identified a range of performance measures that will be used to monitor progress against the RTAP (refer to table 2).

Specific regional targets will be determined and assessed on an annual basis in consultation with the Regional Tourism Boards and Regional Campaign Committees.

How will the industry be involved in monitoring the progress of the Plan and its implementation?

A Regional Industry Reference Group was established to help consolidate the final direction of the RTAP. This Group will have an ongoing role in providing feedback on the implementation of key actions in the Plan.

At a broader level, industry will be invited to provide feedback on the Annual Regional Report Card. A number of new initiatives will be implemented to ensure more consistent and structured forums are in place for industry to engage with Tourism Victoria including quarterly tourism manager forums and regular product development and training sessions. Senior managers from Tourism Victoria will also be involved in the new Regional Tourism Boards to provide more effective mechanisms for communication.

Table 2. RTAP performance targets

Performance indicators	Measure	2008–09	2009–10	2010–11	2011–12
Victorian tourism GSP (direct and indirect)	\$billion	15.8	16.4	17.1	17.8
Victorian tourism employment (direct and indirect)	Number (000s)	184	190	195	201
Visitor expenditure in regional Victoria (domestic)	\$billion	5.8–6.3	5.8–6.5	5.9–6.5	5.9–6.5
Visitor expenditure in regional Victoria (international)	\$billion	230–280	245–300	273–301	286–316
Total accommodation takings in regional Victoria	\$million	63–72	64–73	65–74	66–75
Room occupancy rates in regional Victoria	Per cent	42–46	43–46	44–47	44–48
Brand health position on key attributes: <ul style="list-style-type: none"> • Great place to tour by car • Offers quality regional food and wine experiences • Offers spa and well-being experiences 	Ranking	Establish and/or maintain lead	Establish and/or maintain lead	Establish and/or maintain lead	Establish and/or maintain lead

APPENDIX - RESEARCH INDICATORS

The latest research indicators for Victoria's campaign regions are noted in the tables below. Indicators include:

- Domestic overnight visitors;
- Domestic overnight visitor nights;
- Domestic daytrips;
- Domestic expenditure; and
- International overnight visitors.

Table A. Domestic overnight visitors to Victoria for the year ending June 2008

	Performance ('000)	Average Annual Change 2004–08 (%)	Change 2007–08 (%)
Daylesford and the Macedon Ranges	465	-1.4	+8.6
Gippsland	1,451	-6.8	-5.7
Goldfields	1,215	-5.6	-10.0
Grampians	590	-5.0	-0.3
Great Ocean Road	2,625	+0.1	+4.7
Mornington Peninsula	1,123	-0.3	+3.1
The Murray	2,035	-4.6	-2.3
Phillip Island	760	+4.3	+8.9
Victoria's High Country	854	-3.5	-4.3
Yarra Valley and Dandenong Ranges	593	+4.3	-2.5
Total Regional Victoria	11,278	-2.2	+0.9
Total Victoria	17,291	-0.8	+2.2

Source: National Visitor Survey, Tourism Research Australia, year ending June 2004 – year ending June 2008.

APPENDIX - RESEARCH INDICATORS CONTINUED

Table B. Domestic overnight visitor nights to Victoria for the year ending June 2008

	Performance ('000)	Average Annual Change 2004–08 (%)	Change 2007–08 (%)
Daylesford and the Macedon Ranges	1,202	+4.3	+21.4
Gippsland	4,490	-4.6	-7.1
Goldfields	2,597	-9.0	-15.4
Grampians	1,411	-10.0	-30.9
Great Ocean Road	7,487	-0.2	-3.1
Mornington Peninsula	3,974	+2.7	+18.9
The Murray	5,765	-5.2	-4.3
Phillip Island	2,285	+5.5	+4.3
Victoria's High Country	2,472	-3.6	-15.5
Yarra Valley and Dandenong Ranges	1,485	-1.1	+2.6
Total Regional Victoria	33,348	-2.7	-3.7
Total Victoria	52,323	-1.6	-0.6

Source: National Visitor Survey, Tourism Research Australia, year ending June 2004 – year ending June 2008.

Table C. Domestic daytrips to Victoria for the year ending June 2008

	Performance ('000)	Average Annual Change 2004–08 (%)	Change 2007–08 (%)
Daylesford and the Macedon Ranges	1,170	-3.4	-10.9
Gippsland	2,625	+1.6	+13.0
Goldfields	2,881	+0.5	-0.2
Grampians	686	-3.3	+10.6
Great Ocean Road	4,784	-0.1	-3.9
Mornington Peninsula	3,301	+0.3	+10.3
The Murray	2,822	+1.4	+0.5
Phillip Island	1,264	+6.8	+21.2
Victoria's High Country	760	-9.0	-23.8
Yarra Valley and Dandenong Ranges	2,665	+6.0	+4.6
Total Regional Victoria	22,959	+0.7	+2.0
Total Victoria	34,514	+1.0	+2.5

Source: National Visitor Survey, Tourism Research Australia, year ending June 2004 – year ending June 2008.

Table D. Total expenditure by domestic visitors in Victoria for the year ending December 2007*

	Performance (\$ million)	Average Annual Change 2004–07 (%)	Change 2006–07 (%)
Daylesford and the Macedon Ranges	220	+6.3	+27.9
Gippsland	667	+3.8	+10.2
Goldfields	661	+3.2	+8.2
Grampians	214	+1.8	-7.0
Great Ocean Road	1,331	+9.0	+16.2
Mornington Peninsula	605	+7.7	+33.6
The Murray	986	+2.2	+4.0
Phillip Island	337	+15.3	+40.4
Victoria's High Country	467	+1.8	-7.0
Yarra Valley and Dandenong Ranges	374	+15.5	+17.6
Total Regional Victoria	5,891	+5.9	+12.8
Total Victoria	11,781	+6.0	+9.6

*Includes overnight visitor and daytrip expenditure. Regional expenditure data is only released annually and the above figures are for year ending December 2007. Source: National Visitor Survey, Tourism Research Australia, year ending December 2004 – year ending December 2008, TRA expenditure allocation method applied to year ending December 2004 – year ending December 2008 National Visitor Survey data.

Table E. International overnight visitors to Victoria for the year ending June 2008

	Performance ('000)	Average Annual Change 2004–08 (%)	Change 2007–08 (%)
Daylesford and the Macedon Ranges	10	-7.3	-18.4
Gippsland	54	-2.9	+4.2
Goldfields	35	-5.4	+8.1
Grampians	43	-8.2	+31.6
Great Ocean Road	159	-2.2	-0.2
Mornington Peninsula	41	+4.0	+38.9
The Murray	48	-1.1	+3.3
Phillip Island	29	-8.7	+21.4
Victoria's High Country	15	-8.8	-21.8
Yarra Valley and Dandenong Ranges	26	+2.1	+11.0
Total Regional Victoria	324	-0.5	+7.5
Total Victoria	1,481	+3.5	+0.4

Source: International Visitor Survey, Tourism Research Australia, year ending June 2004 – year ending June 2008.

Tourism Victoria



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