



Regional Strategic Marketing Plan

Prepared for:

Shire of Campaspe and Murray Shire Council



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Table of Contents

Executive summary	3
1 Introduction	8
1.1 Background to the project	8
2 Situational analysis	9
2.1 Murray Region	9
2.2 Echuca-Moama and District	12
2.3 Marketing approach	16
2.4 USP / key attributes	20
3 Market assessment	23
3.1 Context for regional tourism	23
3.2 Visitor assessment	24
3.3 Visitation forecasts	30
3.4 Market evaluation	31
4 Strategic Plan	35
4.1 Overview	35
4.2 Vision	35
4.3 Goals	36
4.4 Target markets	36
4.5 Strategic Plan - summary	37
4.6 Stage one - create a platform to implement the RSMP	39
4.7 Stage two – initiate change	44
4.8 Stage three – deliver results	46
4.9 Stage four - measure progress	50
4.10 Stage five - product development	52
5 Implementation plan	53
6 Assessment of net benefits	60
Appendix	64
Key organisations	64
SWOT	69
Activities of visitors to the Murray	70
Roy Morgan Values Segments	71
Glossary	72
References	73

Executive summary

What is the Regional Strategic Marketing Plan?

In 2012, the Shire of Campaspe, Murray Shire Council, Echuca Moama and District Tourism Association and Tourism Victoria commissioned TRC Tourism to develop a Regional Strategic Marketing Plan (RSMP). The project was required to assess the current situation, identify opportunities for growth and outline marketing strategies to ensure best outcomes for the tourism industry in Echuca-Moama and District over the next three years.

The Plan was developed with significant consultation with Council, industry, tourism organisations, other stakeholders and the community. The RSMP includes an assessment of the current tourism industry, evaluation of historic marketing approaches, a recommended strategic approach to marketing and an action plan for its implementation.

Current state of the tourism industry

Tourism is an important industry in Echuca-Moama and District - in 2011 an estimated 1.18 million visitors spent \$230 million within the Region. However, overnight visitation to the region has declined over the last five years and domestic daytrip travel has been volatile. This trend is reflective of the broader trend of declining visitation in regional Victoria and NSW.

The main drawcard to the region is the twin towns of Echuca-Moama with a significant proportion of the tourism product, services and accommodation located in the twin-towns. The primary tourism product strengths of Echuca-Moama and District include the Murray River, golf, history and heritage and festivals. Secondary product strengths are food, wine and nature-based activities. Indigenous tourism has been identified as an emerging market.

Echuca-Moama and District Tourism Association (EMDTA) currently undertake destination marketing of the Region. There are also a large number of other tourism organisations operating in the region and there is some confusion amongst industry on the roles and responsibilities of these organisations. The current tourism structure does not offer a strong process for coordinated destination marketing activities.

Visitor perceptions and behaviour

There is little information available on visitor behaviour specific to Echuca-Moama and District. However, visitation data for the broader Murray Region is available and believed to reflect the trends at the local, Echuca-Moama and District, level.

Key visitor trends and insights include:

- The main purpose of visitation to the Murray Region continues to be for holiday or leisure, followed by visiting friends and relatives.
- The average age of visitors is increasing in the Murray Region. By 2021 it is projected that only 40% of visitors will be aged between 15-44 years.
- Whilst visitors to the Murray participate in the outdoors, many of the key activities undertaken are indoor activities linked to the townships such as eating out, pubs/clubs discos and shopping (MRTB, 2012b).
- Visitors stay for an average of 2.8 nights in Echuca-Moama and District. This is below the Murray average of 3.1 nights.
- The majority of top of mind associations with the Murray Region are related in one way or another to the River and its activities (as identified by consumer survey).

Historic approach to marketing

The Region has traditionally been marketed under a 'hub and spoke' type arrangement. It has used Echuca-Moama as the drawcard for the Region and encouraged tourists to visit the surrounding areas once they have arrived in the destination. This has principally been undertaken through the Visitor Information Centre in Echuca.

There has been no long-term marketing strategy for the region with little strategic evaluation of markets and destination positioning. The current positioning of the destination has not evolved over the last ten years and has been focused on history and heritage and the paddle steamer identity. It is generally agreed by industry that the brand identity of Echuca-Moama and District is 'tired' and requires an overhaul.

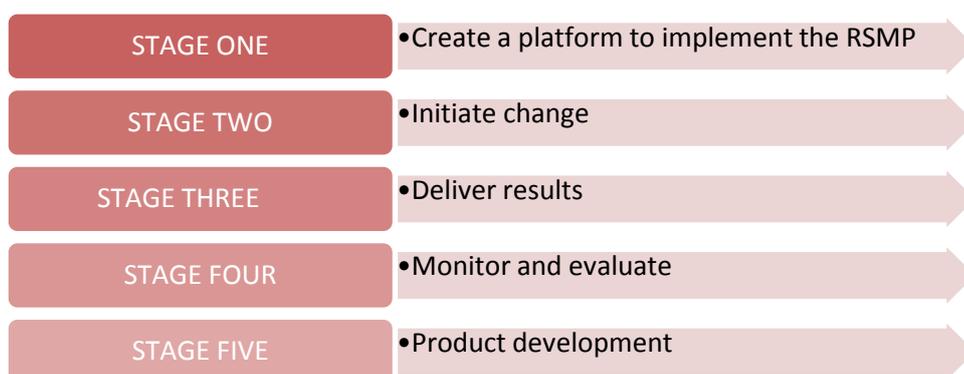
Whilst the traditional marketing approach has been well suited to the Region in the past, there are opportunities to improve the approach to increase visitation to the region along with length of stay and regional dispersal of visitors.

Recommended approach

Change is required. Without a change in the approach to destination marketing in Echuca-Moama and District overnight visitation may continue to decline.

Change is often not popular and requires people to think and act differently. It can also affect the range of stakeholders in different ways. For this reason change can be challenging to implement and should be undertaken over time. The RSMP recognises the current situation in Echuca-Moama and District and the challenges this presents. These challenges have shaped the development of the Plan. In particular, structural changes within the tourism industry must be undertaken before a new strategic direction for marketing can be implemented.

This is clearly identified in the five stages of the Strategic Plan:



Stage five 'product development' is outside the scope of the RSMP. However, it has been included at a top line level as its integration with marketing is critical to the successful implementation of the Strategy.

The proposed three-year RSMP is just the starting point and many strategies proposed in the Plan will take more than three years to complete. It is the first steps towards implementing a strategy that will best position the destination for long-term tourism growth and improve the contribution tourism makes to the local economy and community in the Region.

Summary of the Plan

Vision

Echuca-Moama and District will be the leading destination on the Murray where visitors can experience the Murray River and surrounding district through activities, stories and people. The natural attributes of the Murray will be supported by a rich events calendar, world-class golfing and great food and wine.

Goals

- Increase visitation
- Increase length of stay of visitors
- Increase visitor expenditure
- Improve seasonality of visitation
- Enable dispersal into surrounding regions by raising awareness of the destination name 'Echuca- Moama' as the 'hub' to attract visitors.

Target markets

Analysis shows that there is scope for Echuca-Moama and District to increase the market share of the Traditional Family Life segment. However, this can only be achieved through a change in perception of the region as outlined in the RSMP. A recommendation on target markets is outlined below.

Current target market	Recommended target market (short-term)	Recommended target market (medium to long-term)
Priority: Socially aware	Priority: Traditional family life	Priority: Traditional family life Conventional family life
Secondary: Traditional family life Conventional family life Visible achievers	Secondary: Conventional family life Socially aware Visible achievers	Secondary: Socially aware Visible achievers

Strategic Plan

The five stages of the Strategic Plan are summarised below.

Stage	Focus	Key actions
STAGE ONE Create a platform to implement the RSMP	Undertake structural changes required to implement the RSMP	<ul style="list-style-type: none"> • Industry restructure • Consolidate resources • Build support
STAGE TWO Initiate change	Work with industry and stakeholders to change the strategic direction, positioning and brand of the destination.	<ul style="list-style-type: none"> • Reposition the destination • Rebrand the destination
STAGE THREE Deliver results	Delivery of strategic marketing and event specific strategy to change visitors' perceptions of the Region and their behaviour.	<ul style="list-style-type: none"> • Be strategic with destination marketing activities • Event specific strategy

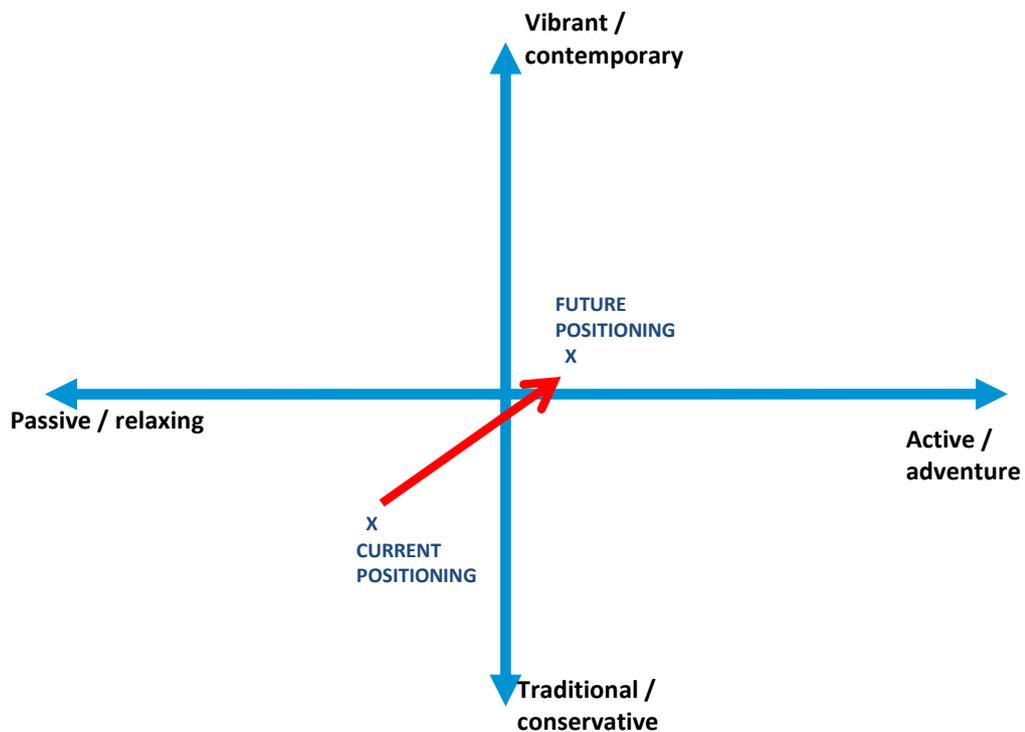
Stage	Focus	Key actions
STAGE FOUR Measure progress	Track the progress of the Plan and make amendments where necessary.	<ul style="list-style-type: none"> Measure progress
STAGE FIVE Product development	Undertake product development activities to align and support the new strategic direction.	<ul style="list-style-type: none"> Product development

The Plan is focused on repositioning Echuca-Moama and District as a more vibrant, contemporary and active destination that over time will provide ‘soft’ adventure experiences for a younger demographic such as families.

There is a lot of competition from other destinations along the Murray, in the State and offshore for the Melbourne visitor market. In order to address the decline in visitors over recent years, the region needs to be reinvigorated and reposition itself to remain competitive.

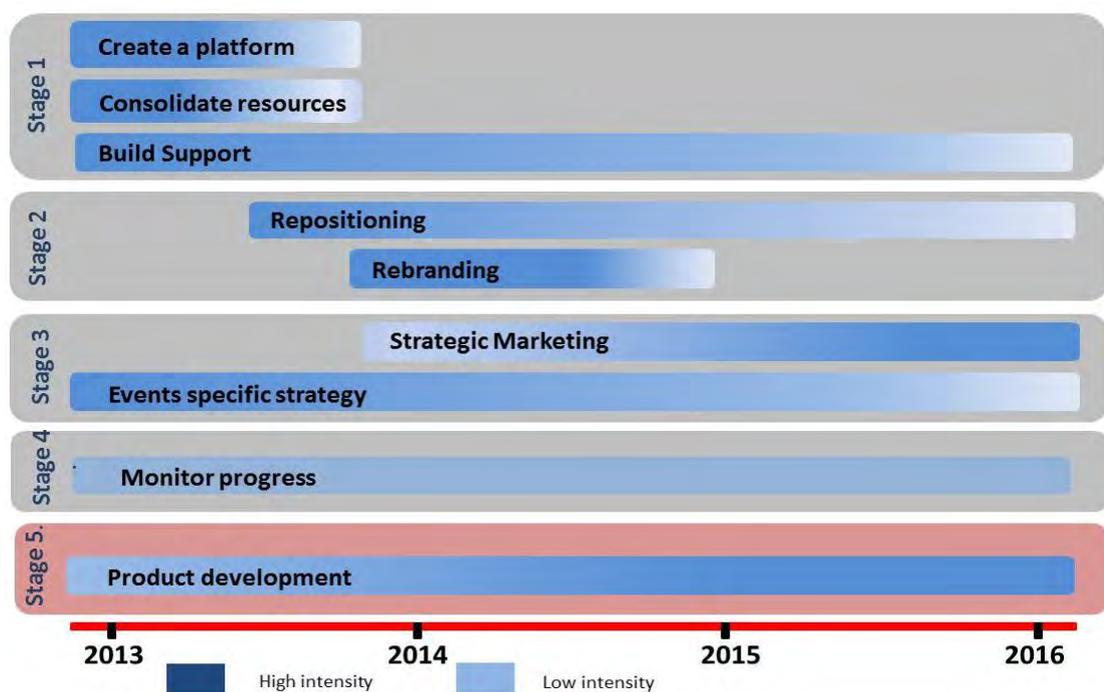
The region must refresh its heritage experiences and also develop more nature based experiences. It must move away from being defined as a static and ‘tired’ history and heritage destination. Instead, the focus should be on experiencing the River through the activities and experiences it offers.

The Plan is about aligning product, brand and marketing to deliver a more ‘active’ and ‘contemporary’ experience to the target markets. It requires a significant shift in visitors’ perceptions to change the way people think and feel about Echuca-Moama and District and how they behave at the destination. This is illustrated in the positioning diagram below.



The Plan is focused on achieving the repositioning through a re-brand and strategic marketing approach. This will require a shift from the current reliance on 'call to action' marketing activities to a strategic marketing approach. However, changing consumer perceptions through re-positioning is a long-term process and benefits may not be immediate. The Plan recognises that short-term visitor growth is also required to ensure support of industry for the RSMP. This will be achieved through an events strategy that will increase visitation in the short-term. The Plan also recognises that the RSMP needs to be measured and revised on an ongoing basis.

The staged implementation of the Plan is illustrated in the figure below. It shows the timeframe for each of the stages. The Plan will be implemented by EMDTA, with support by Murray Shire Council, Shire of Campaspe, LTAs and industry.



Net benefit assessment

Three visitation scenarios were used to estimate the impact of implementing the RSMP. Under the Base Case scenario it is forecast that by 2018 the implementation of the RSMP would have increased visitation within the region by 158,000 p.a. than what would otherwise have been the case.

It is estimated that the additional visitation as a result of the implementation of the Plan would increase direct and indirect tourism expenditure by \$30.9 million and \$28.1 million respectively in 2018. It would also support employment for an additional 352 full-time equivalents. Other economic impacts from the implementation of the RSMP are likely to include increased investment, diversity and resilience of the tourism sector.

There may also be some social impacts within the community through the implementation of the RSMP. However, these are not expected to be significant given the relatively small scale of the forecast increase in visitation.

1 Introduction

1.1 Background to the project

In 2012, the Shire of Campaspe, Murray Shire Council, Echuca Moama and District Tourism Association and Tourism Victoria commissioned TRC Tourism to develop a Regional Strategic Marketing Plan. The project was required to assess the current situation, identify opportunities for growth and outline marketing strategies to ensure best outcomes for the tourism industry in Echuca-Moama and District over the next three years.

The Regional Strategic Marketing Plan (RSMP) was proposed to help combat a decline in visitor numbers within the Region over recent years. The RSMP's objectives as outlined in the Consultant's Brief are to:

- increase visitor expenditure and length of stay through promoting a range of quality experiences
- increase visitor dispersal both geographically and seasonally
- raise awareness of the destination name 'Echuca- Moama' which will be seen by the community and industry as the 'hub' to attract visitors into Echuca-Moama and enable dispersal into surrounding regions.

The development of the RSMP was supported with representation from Murray Regional Tourism Board (representing Tourism Victoria), Echuca-Moama and District Tourism Association and both Councils on the Project Steering Committee.

The development of the Plan was timely given other activities concurrently being undertaken by the Murray Regional Tourism Board (MRTB). The MRTB is responsible for tourism development, regional marketing and advocacy for the Murray Region and has recently undertaken a strategic review of the Murray Region. Draft Reports of the MRTB's strategic review were considered in the development of the RSMP.

The RSMP has been developed to meet the objectives and outcomes identified in the Consultant's Brief. It broadly contains:

1. An assessment of the current tourism industry in Echuca-Moama and District
2. An evaluation of its markets
3. A marketing strategy that will best position the destination for long-term growth
4. Recommendations on how to implement the strategy and best deliver outcomes for the industry over the next three years
5. An impact assessment of the benefits from implementing the RSMP for the tourism industry and the broader community.

The RSMP has been developed to benefit the whole of the two municipalities. This region is referred to as Echuca-Moama and District within the report to keep the terminology consistent with what the tourism industry and visitors use. The name "Echuca-Moama" has higher awareness amongst potential and actual visitors than the smaller locations in the district and the names of the Shire of Campaspe and Murray Shire Council.

2 Situational analysis

A summary of the state of the tourism industry at a regional (Murray Region) and local (Echuca-Moama and District) level is provided within the situation analysis.

2.1 Murray Region

2.1.1 Overview

A map of the Murray Region is provided in Figure 1. The region includes the Shires situated in proximity to the Murray River from approximately Mildura in the West to Albury-Wodonga in the East. It includes Shires in both NSW and Victoria.

Figure 1 Map of the Murray Region (MRTB, 2012a)



There are five sub-regions within the Murray Region as defined by the Murray Regional Tourism Board. These are outlined in Figure 2. Both the Murray Shire Council and Shire of Campaspe are located in the 'Central Murray' sub-region along with Deniliquin Council.

Figure 2 Sub-regions of the Murray Region (MRTB 2012a)

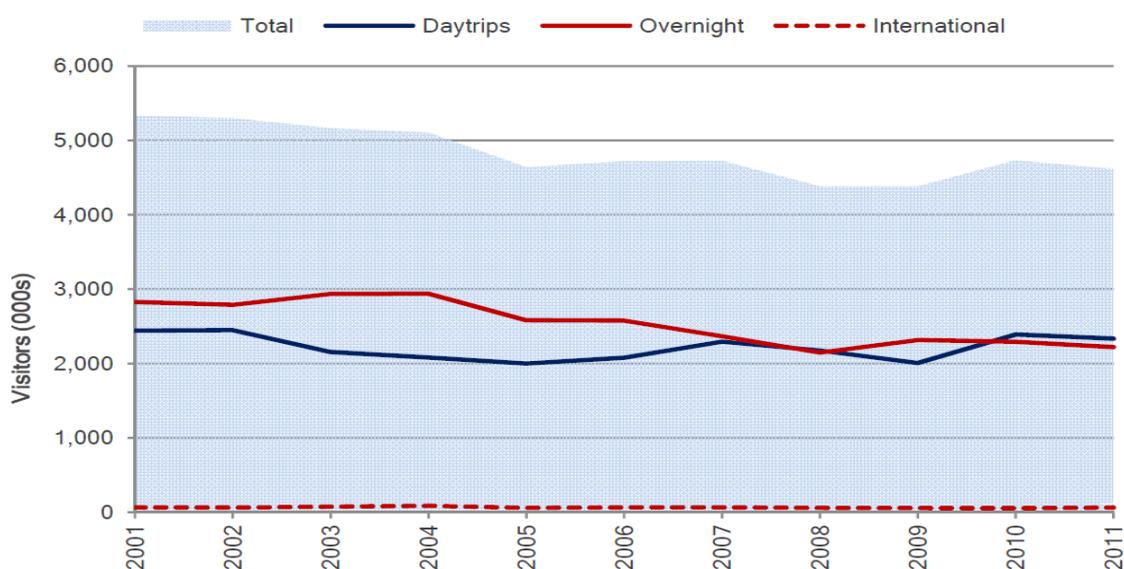
Region	MRTB Councils	Aligned Councils
Western Murray	Mildura, Wentworth	
Mid-Western	Balranald, Wakool, Gannawarra Swan Hill	
Central Murray	Deniliquin, Murray Campaspe	Conargo
Mid East Murray	Berrigan, Corowa Moira	Jerilderie
Eastern Murray	Greater Hume, Albury City Wodonga City	Indigo Towong

2.1.2 Visitation

In 2011 approximately 4.5 million people visited the Murray Region. However, visitation to the Region has been declining over the last 10 years at a rate of approximately 2.5% per year (refer to Figure 3).

The decline in overnight visitation has been greater than the decline in day trips over the last ten years. There has also been a variation in visitor numbers across the sub-regions of the Murray over the last ten years. Most noticeably day trip visitation has grown in the eastern subregions and declined in the others. This is due to the key train and road linkages between Melbourne, Sydney, Canberra and Sydney that allow for more accessible day trips to the eastern areas (MRTB, 2012b). Further analysis on visitation trends within the Central Murray sub-region is provided in section 2.2.2

Figure 3 Visitation to the Murray Region (MRTB, 2012b)



The decline in overnight visitation is a phenomenon observed in many regional centres across NSW and Victoria. The context for the broader decline in regional tourism across these centres is outlined in section 3.1 of this report.

2.1.3 Product strengths

With a declining domestic tourism visitation across much of Regional NSW and Victoria the competition for tourists is stronger than ever. A snapshot of the product strengths of Victoria's regions is presented in Figure 4. Product strengths are categorised as primary, secondary or emerging.

Figure 4 Product strengths of Victoria's Regions (MRTB 2012, Tourism Victoria 2009 – adapted by TRC Tourism)

Activity	Daylesford	Gippsland	Goldfields	Grampians	Great Ocean Road	Mornington Peninsula	The Murray	Phillip Island	Victoria's High Country	Yarra Country
Food and Wine	Light Blue	Light Blue	Light Orange	Light Orange	Light Orange	Light Blue	Light Orange	Light Orange	Light Blue	Light Blue
Spa and wellbeing	Light Blue				Light Blue	Light Blue			Light Blue	Light Blue
Wildlife		Light Blue		Light Blue	Light Orange	Light Orange		Light Blue		Light Orange
Nature-based		Light Blue	Light Blue	Light Blue	Light Blue		Light Orange	Light Blue	Light Blue	Light Orange
Arts and culture	Light Blue		Light Blue			Light Blue	Light Blue			Light Blue
Indigenous				Light Blue	Light Orange		Light Blue			
Golf					Light Orange	Light Blue	Light Blue			Light Blue
Adventure				Light Blue	Light Orange		Light Blue		Light Blue	
History and heritage		Light Blue	Light Blue		Light Orange		Light Blue		Light Orange	Light Orange
Festivals and events	Light Blue	Light Blue	Light Blue		Light Orange	Light Blue	Light Orange	Light Blue	Light Blue	Light Orange
	Primary		Secondary					Emerging		

Primary tourism product strengths

Figure 4 illustrates that the primary product strengths of the Murray Region are 'golf' and 'history and heritage' compared with other destinations across NSW and Victoria. History and heritage products include the Port of Echuca, Bonegilla Migrant Experience, Paddleboats and Swan Hill's Pioneer Settlement. Other less developed product in the region includes the Chaffey Trail in Mildura, Federation history in Corowa and the heritage ports in the Murray Region (MRTB, 2012a).

There are 67 golf courses spread out across the entire Murray Region. The MRTB identified Murray Downs, Yarrawonga and Rich River as standout courses (MRTB 2012a).

Secondary tourism product strengths

The secondary product strengths of the Murray Region include: 'food and wine', 'nature-based' and 'festivals and events'.

The Murray Region is a prominent agricultural area with a strong wine, cropping and horticultural industries. Tourism Victoria's Regional Tourism Strategy identified food and wine as a primary product strength within the region. However, an audit undertaken by the MRTB identified that there is limited access to quality local and fresh food product as well farm gate experiences in the Region.

Nature-based tourism is another 'secondary' tourism product strength of the Murray Region. The Region has significant natural assets with the most identifiable of these being the Murray River.

Festivals and events are also recognised as a secondary product strength of the Region. Key events include the Southern 80 in Echuca-Moama and the Deniliquin Ute Muster.

Emerging tourism product

Arts and culture are more prominent in the Western and Eastern Murray sub-regions with limited product in the Central Murray. Opportunities to further develop arts and culture product have been identified by the MRTB.

Indigenous tourism product is limited in the Region but it is growing. Adventure tourism product is also limited with an emerging node in Western Murray and the Mid-Eastern Murray for this product (MRTB 2012a).

2.2 Echuca-Moama and District

2.2.1 Industry snapshot

Echuca-Moama and District refers to the area covered by both the Shire of Campaspe and the Murray Shire. A snapshot of the tourism industry in Echuca-Moama and District is provided in Figure 5 which also includes statistics from the Deniliquin Shire.

It shows that in 2011 an estimated 1.18 million visitors spent \$230 million within the Region. The majority of the expenditure was from domestic overnight visitors (\$177 million). The expenditure from International overnight visitors is not known but is expected to be relatively small in comparison.

Figure 5 Visitation in the Echuca-Moama and District (Data Insights, YE Sept 2011,)

2011	Visitation	Visitor nights	Total expenditure	Expenditure details
Domestic overnight visitation	527,000	1,422,000	\$177 million	\$125 per night 2.8 nights average stay
Domestic day trip travel	647,000		\$53 million	\$92 per day
International overnight visitation	7,000	*	*	*
Combined visitation	1.18 mil	1.42 mil**	\$230 mil**	-

Note: data includes Shire of Campaspe, Murray and Deniliquin

* Insufficient data available ** Excludes international overnight visitation

Local level visitation data for the townships within Echuca-Moama and District is not available. However, it is widely recognised that the key drawcard to the region is the twin towns. A significant proportion of the tourism product, services and accommodation is located in the twin-towns. This includes the Visitor Information Centre in Echuca.

An assessment of Echuca-Moama and District's strengths, weaknesses, opportunities and threats in relation to access, product, markets, marketing, competitors, and resources was developed in consultation with the industry. A summary of the SWOT analysis can be found in Table 8 in the Appendix, and has been considered in the development of the RSMP.

2.2.2 Trends in visitation

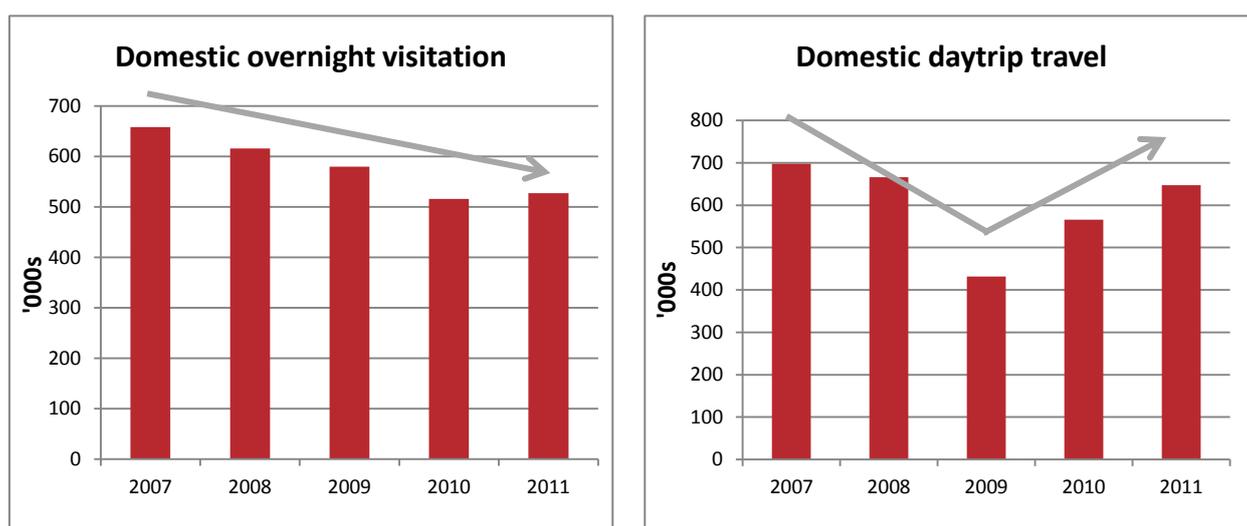
The key visitation trends in Echuca-Moama and District are not dissimilar to other regional destinations in Victoria (refer to section 3.1). This includes a decline in domestic overnight visitation and volatility in domestic day trip travel. In particular, in the last two years whilst more people are travelling to the region for a day trip fewer people are staying overnight.

On average domestic overnight visitation has declined at a rate of 5% per annum for the last five years. However, there was a small increase in visitation of 2% from 2010 – 2011 against this trend. This is illustrated in Figure 6.

Domestic day trip travel has also been declining in the Region over the long term. However, in the last five years there has been volatility in the number of domestic day trips with a noticeable increase in day visitation from a slump in 2009. This is also illustrated in Figure 6.

International visitation to the region is low and there is insufficient data to conclude trends within this market.

Figure 6 Domestic overnight and daytrip visitation in Echuca-Moama and District (Data Insights, YE Sept 2011)



2.2.3 Product strengths

The product strengths of Echuca-Moama and District (represented by the 'Central Murray' sub-region) relative to other sub-destinations in the Murray Region are provided in Figure 7. These strengths were outlined in the MTRB Draft Research Paper, 2012.

A public workshop at the Campaspe Council Chambers conducted by TRC Tourism also asked participants to provide their comments on 'what sets the region apart'. The feedback was complementary to the product strengths identified by the MRTB with the majority of participants citing either history and heritage or festivals and events as the major differentiating characteristics of the region.

Figure 7 Product strengths of Echuca-Moama and District (represented by the 'Central Murray' Sub-region) MRTB 2012b

Activity	Western Murray	Mid Western	Central Murray	Mid East Murray	Eastern Murray	The Murray
Food	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Wine	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Nature Based	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Arts and culture	Secondary	Secondary	Secondary	Secondary	Secondary	Emerging
Indigenous	Secondary	Emerging	Emerging	Secondary	Secondary	Emerging
Golf	Primary	Primary	Primary	Primary	Primary	Primary
Adventure	Emerging	Secondary	Secondary	Emerging	Secondary	Emerging
History and Heritage	Secondary	Secondary	Primary	Secondary	Secondary	Primary
Festivals and events	Secondary	Secondary	Primary	Secondary	Secondary	Secondary

Primary =
 Secondary =
 Emerging =

Primary tourism product strengths

The primary tourism product strengths of the Central Murray Region include golf, history and heritage and festivals and events. Golfing is a primary strength across all the sub-destinations. The Central Murray is the only sub-region where festivals and events and history and heritage are primary tourism product strengths. This sets the Central Murray apart from the other sub-regions. Key history and heritage tourism product is concentrated around the historic Port of Echuca.

Secondary tourism product strengths

Secondary tourism product strengths include food, wine and nature-based tourism product. Barmah-Milewa and Gunbower National Parks are natural assets of particular importance. Oscar W's in Echuca is one of the few signature dining experiences in the Murray Region. It features a Chef's Hat in the Age Good Food Guide.

Emerging tourism product

Emerging tourism product includes Indigenous-based tourism. Local stakeholders identified significant Indigenous tourism product opportunities within Barmah National Park.

The Draft Murray Tourism Development Plan (MRTB 2012b) outlines a number of 'tier 1' product development projects. Tier 1 projects are those that have the greatest likelihood of 'improving the quality range of the Murray Region's tourism product offer with a view to driving increases in visitation, length of stay and visitor experience'.

Three tier 1 projects were identified in the Central Murray sub-region. These were a 5-star Resort and Conference Centre in Echuca, Port of Echuca Revitalisation Stage 2 & 3, and the River Red Gum Parks Tourism Investment.

2.2.4 Key organisations

There are many organisations involved in the tourism industry in the Region. These include:

- State Tourism Organisations
- Shire Councils
- Regional Tourism Boards
- Regional Tourism Associations (RTAs)
- Local Tourism Associations (LTAs)
- Other organisations.

The roles, responsibilities and assessment of each of the tourism organisations in Echuca-Moama and District are included in the Appendix.

2.2.5 Tourism structure

There is not unanimous agreement across the region on what the Region's tourism structure looks like. The undefined roles and activities of many organisations in the Region make it difficult to determine the structure.

However, one issue that is clear is that the structure is not well defined and understood across the region. This was reflected during consultation with LTAs and industry.

An outline of the tourism structure in the Region is illustrated in Figure 25 in the Appendix. It is based on the structure now occurring within the region which has evolved historically as smaller associations and groups have developed and/or ceased to operate. Consultation with stakeholders provided the following key observations concerning the current structure:

- The tourism structure is complicated and fragmented
- Not all organisations in the region are operating to their charter and many have undefined roles and responsibilities
- The current structure does not clearly maintain an optimum process for destination marketing activities
- The leadership role of EMDTA in destination marketing could be enhanced. Some stakeholders suggest that EMDTA is restricted in their capacity to provide further leadership due to resource limitations
- Organisations other than EMDTA are undertaking destination marketing activities, which are not coordinated or aligned through a common strategy
- Responsibility for delivery of product development and industry development functions lies separately from the destination marketing function except at MRTB strategic level
- Due to the short operating period of MRTB, many benefits of the organisation are yet to be realised
- There is a reliance on membership-based organisations and private funding to undertake destination marketing activities
- The scope for EMDTA to partner with the MRTB and other sub-regions to promote the broader Murray has also been constrained by availability of resources.

2.3 Marketing approach

This section of the report outlines the historic marketing approach within Echuca-Moama and District. It includes an outline of the organisations and their roles in destination marketing as well as the unique selling proposition, brand positioning and destination marketing activities undertaken within the Region.

2.3.1 Background to the current marketing approach

Historically the majority of destination marketing activities within Echuca-Moama and District has been undertaken by EMDTA. In recent years it is the perception of many stakeholders that the effectiveness of EMDTA's destination marketing activities has been limited by its resources and has inhibited EMDTA from providing further leadership in destination marketing. Some LTA's such as the Accommodation Association have provided EMDTA with funding to undertake destination marketing activities. One example of this is the *Stay 3 Pay 2* television commercial.

At a broader level marketing of the Murray Region is coordinated by MRTB. However, feedback from industry is that the expected benefits of the Board are yet to be realised due to the short timeframe the Board has been in operation. The MRTB is developing a three-year regional strategy in consultation with regional representatives. The release of the MRTB Strategic Plan later this year will provide a common strategy across the Region.

Historically Echuca-Moama and District has not had a clearly defined long-term strategy to align the tourism industry and drive destination marketing activities. This has impacted the Region's ability and effectiveness to attract visitors. The RSMP aims to provide Echuca-Moama and District with this strategy.

2.3.2 Brand positioning – Murray

The Murray Regional Tourism Board (MRTB) is responsible for integrated tourism development, regional marketing and advocacy within the Murray Region. Prior to the establishment of the MRTB the Murray Campaign Committee (MCC) undertook regional marketing initiatives for the Murray in partnership with Echuca-Moama and District and other sub-regions. This included the 'Wind Down' campaigns and branding.

Under the MCC the Murray was positioned as a brand that encouraged relaxation, a slower pace, and a sense of 'winding down'. The 'essence' of the brand was defined as an 'appreciation of things that take time'.

The brand positioning of the Murray Region is being revised by the MRTB. A catalyst for the repositioning was that the industry and MRTB felt the brand too passive and not reflective of the outdoor experiences available in the region.

2.3.3 Brand positioning – Echuca-Moama and District

The brand position of Echuca-Moama and District was primarily established from the early 1980s. There has been little change to the positioning since.

1980s: Resort clubs and Sports clubs

During the 1980s Moama received thousands of visitors each week from Melbourne due to New South Wales' more liberal gambling laws and the presence of poker machines in some of Moama's entertainment venues. The access to poker machines was a large and unique drawcard for the Murray Region.

Several "resort clubs" in Moama flourished during this period. However, the legalisation of poker machines in Victoria brought to an end the many bus tours to the NSW river towns. However, the clubs continue to be a significant component of the tourism industry. They have re-focused their activities towards general entertainment.

1983: Rivers run/ Paddle steamers

The Australian mini-series *All the Rivers Run*, which was filmed in and around Echuca, put Echuca-Moama on the tourism map and helped to position it as a romantic, historical river destination. The airing of this series around Australia and internationally from 1983 to 1989 revitalised Echuca's tourism economy.

Echuca Moama was positioned as Australia's Paddle Steamer Capital and the town was the best known and leading destination along the river.

Early 1990s Marketing

Echuca and Moama tourism associations merged utilizing the strengths of both destinations (the history/ heritage, the river and paddle steamers, abundance of accommodation) and hugely successful short break holiday packages were developed.

1980s- 1990s: Events focus

The food and wine market within Echuca-Moama blossomed in the 90's and festivals were developed around them e.g. the riverboats, jazz, food and wine festival.

River based events such as the Southern 80 and Rotary Steam Horse and Vintage rally were also developed and brought a focus on water sports and the river. The Winter Blues festival was developed to fill a quiet time, and the Wedding expo to target the wedding market.

Most noticeably the areas above highlight how the brand has had little reinvention over the last ten years. Consultation undertaken in the region revealed that many local stakeholders believe that brand has lost its vibrancy. They believe the destination has become slow paced and tired and has positioned itself as a static historical destination for too long.

2.3.3.1 Echuca Moama Brand Identity

The brand identity refers to the outward expression of a brand – including its name, trademark, communications, and visual appearance.

Echuca Moama currently has a logo and tagline 'EMagine Echuca Moama' that is used throughout marketing materials and advertising campaigns. The colour palette also runs through most marketing materials. Examples of the brand identity are shown in Figure 8.

EMDTA is currently considering a re-brand.

Figure 8 Execution of Echuca Moama brand identity



Images sourced from www.echucamoama.com

2.3.4 Marketing strategy of Echuca-Moama and District

The Region has historically been marketed under a 'hub and spoke' type arrangement. It has used Echuca-Moama as the drawcard for the region and facilitated visitors to visit more dispersed areas once they have arrived in the destination. This has principally been undertaken through the VIC in Echuca. Consultation with stakeholders in the region confirmed this process.

This model has historically provided an effective and efficient way to promote the region from an organisational perspective. This is because:

- It leverages on the high awareness of Echuca-Moama. Echuca-Moama has a much greater profile and awareness as a visitor destination amongst current and potential visitors than other localities in the Region.
- There is already significant goodwill associated with the Echuca-Moama brand i.e. previous tourists have had a positive experience of the location.
- The majority of tourism product, accommodation and services in the region are located within Echuca-Moama.
- Many of the smaller localities have limited services, product and accommodation to support visitor markets. Many offer a niche experience and are reliant on Echuca-Moama to support other visitor needs.

- Echuca-Moama is centrally located within the two Shires on popular access routes.
- Its location allows for effective tourism management of the two jurisdictions compared to any alternate hubs located outside of the region (for example at Shepparton). There are additional risks associated with locating a hub outside of the region including reduced management control, competition with other destinations, lower product awareness and lower engagement with the region at the hub. For these reasons and the other benefits listed above it is not practical to locate the hub outside of the region.

No other locations were identified as suitable hubs for the region. However, opportunities to improve the existing hub and spoke arrangement are discussed in section five of the report.

The promotion of Echuca-Moama and District is undertaken through EMDTA. EMDTA produces an annual Marketing Plan that outlines the scheduled marketing activities for the Region. It provides an assessment of each marketing campaign including objectives and target markets.

However, it is unclear from these marketing campaigns what the overall brand strategy or long-term objectives are for Echuca-Moama and District, i.e. it is unclear whether there is a strategy that ties all the marketing campaigns together.

Without long-term goals in place the marketing strategy for the Region cannot be evaluated or measured. There has also been limited evaluation of individual marketing campaigns against their objectives prior to 2011. As such it is not clear what campaigns have been successful and for what reasons.

Consultation in the region supported the perception that marketing activities have not always been aligned to strategic goals and often targeted other short-term needs. The current *Stay 3 Pay 2* campaign is an example of a marketing activity that is more focused on a 'call to action' rather than branding / positioning of the Region. This is an observation only, not a criticism, with the majority of stakeholders supportive of the work undertaken by EMDTA to-date.

Key objectives of marketing activities undertaken by EMDTA over the last three years include:

- increase visitation in quieter months
- benefit retail and tourism outlets
- Showcase food, wine and product range
- raise the profile of the destination as a food and wine region
- encourage repeat visitation to the area (EMDTA, 2012).

2.3.5 Marketing activity

Tactical marketing activity (the execution of marketing campaigns) of Echuca-Moama and District is undertaken by a variety of organisations and associations as well as the private sector. The following table provides a summary of some of the recent marketing activity undertaken and delivered by EMDTA.

Activity and content	Analysis
Regional TV and radio advertising Stay3Pay2 campaign	Current focus on call to action and discounting in advertising rather than destination brand awareness based on target market motivations. Undertaken in partnership with the Accommodation Association and EMDTA
Website Includes online tourist guide booklet	Positioning appears to be trying to be all things to all people No profiling of key events Limited interactivity with the site

Activity and content	Analysis
Social media Facebook and twitter	Doesn't include much consumer generated content – more supplier led. Text heavy content
Print collateral Brochures / magazines etc.	Not highly destination marketing focused – mostly adverts for individual businesses
Echuca Visitor Centre	Core role is to disperse visitors throughout the region, convert sales and increase length of stay

2.4 USP / key attributes

A unique selling proposition (USP) is a characteristic of a destination that differentiates it from its competitors. It can be a real or perceived characteristic and is often a critical component of a promotional theme around which an advertising campaign is based. It is focused on product benefits rather than product features.

There are a number of unique characteristics of Echuca-Moama and District. An assessment of the key attributes of Echuca-Moama and District is provided in the table below. It rates each attribute with its appropriateness as a USP / key attribute of Echuca-Moama and District.

Key attribute	Assessment	Rating
Closest point of the Murray River to Melbourne	Defendable and easy to communicate Proximity to Melbourne is an influential factor in visitation (refer to Figure 9) Understood by a proportion of the target market already Differentiates Echuca-Moama and District from the other sub-regions	★★★★★
Temperate Climate - consistent sunshine & warmth all year round	Applicable in comparison to Melbourne and other regional Victorian destinations. However, not a perceived benefit against other destinations such as Queensland Defines the Murray Region and is not specific to Echuca-Moama and District Region has been promoted in marketing material as having 'more sunny days than the Gold Coast'. Could be adapted to be more relevant to the target market. For example marketing activities to focus directly on the benefits for visitors e.g. 'escaping the cold' (of Melbourne)	★★★
History and heritage attractions	Awareness of history and heritage attractions has been steady, but remains significantly lower than the Goldfields A 'history and heritage' identity can have varied impacts across target market groups – i.e. it might not be a drawcard for some younger markets Perception that the history and heritage attractions are 'tired' (as identified by stakeholders during consultation). It is recommended that history and heritage is promoted as 'vibrant', 'engaging' and 'exciting' The Port of Echuca redevelopment is an opportunity to relaunch the identity of the Region's history and heritage Recommended that Echuca-Moama and District should associate rather than define themselves with history and heritage themes	★★★★

Key attribute	Assessment	Rating
Paddle steamer experiences	<p>Unique experience to the Murray Region. However, also available in Mildura</p> <p>Strong linkages to history and heritage themes</p> <p>Appeal to some key market groups only. Not suitable for all markets (in particular a younger demographic)</p>	★★★★1/2
Murray River (and associated activities)	<p>The River and its associated activities define the Murray Region</p> <p>However, uniqueness is across the Region and not specific to Echuca-Moama and District</p> <p>Iconic river, well understood by the domestic market</p> <p>River associated activities such as fishing, water skiing, paddling have a high participation rate. Are regarded as significant drawcards by these market groups</p> <p>Could be enhanced to provide a link or 'theme' across the soft adventures available in the region</p>	★★★★★
Quality golfing at a great price	<p>Large number of quality golf courses throughout the Murray as well as in Echuca-Moama and District</p> <p>Participation and awareness of golfing is decreasing</p> <p>Increased competition from destinations in closer proximity to Melbourne</p> <p>Greater support is required to arrest the decline in awareness and participation in golfing in the region</p>	★★★★★
Iconic landscapes	<p>Awareness of the state and national parks in the region is low. Participation of visitors in these areas is similarly low</p> <p>Opportunity to capitalise on increased environmental resources for conservation and habitat improvement to increase visitation to the state and national parks in the region</p> <p>Limited commercial nature-based tourism product within the parks e.g. tours</p> <p>NPWS and Parks Victoria are currently in the early stages of developing visitor strategies for the Red Gum National Parks</p>	★★★★1/2
Centre for festivals and events in regional Victoria	<p>The Region has a number of core events, but many of these do not currently align with desired product positioning or are focused on attracting key target markets (e.g. Southern 80)</p> <p>Increasing competition in the festivals and events markets across regional Victoria. However, scope for more unique and engaging events</p> <p>Lack of a high quality, purpose built conference facility within Echuca-Moama (e.g. with on-site accommodation, break out rooms etc...)</p> <p>Recognition of the Region as a centre for festivals and events has been increasing. Potential for this momentum to continue and events calendar be enhanced</p>	★★★★1/2

Key attribute	Assessment	Rating
Food and wine	<p>The awareness and perceptions of the Murray Region as a food and wine destination is increasing. However, it is still not considered a primary strength by the MRTB due to limited access to local product and farm gate experiences including cellar door experiences. Product development is required to develop suitable food and wine experiences at the farm gate. This key benefit can be enhanced to assist the increase in awareness and perceptions of the region as a food and wine destination</p> <p>Good food and wine is expected at most destinations – and as such is becoming less defining for destinations</p> <p>Scope for product development in Echuca-Moama and District such as the Backroads Trail initiative</p>	★★★1/2
Hub for nature-based tourism and other regional activities	<p>Some experiences are already popular (especially associated with the Murray River such as fishing). However, limited product currently available e.g. tours., although product like the Back Roads Trail is emerging</p> <p>Huge potential for nature-based tourism product and experiences in the regional areas of Echuca-Moama and District. For example Red Gum Forests and Indigenous experiences in Barmah. Potential to be a defining key attribute of the region</p> <p>Product development required before perceptions can be changed</p>	★★★

3 Market assessment

3.1 Context for regional tourism

Tourism in regional NSW and Victoria is facing some significant challenges. Tourism Victoria (2009) identified that visitor growth has remained stagnant in recent years due to a flat domestic tourism sector. People have been taking fewer trips, spending fewer nights away and spending less per trip in regional Australia. The decline in domestic visitation to regional areas is a phenomenon that is also occurring nationally as well as in most other western countries.

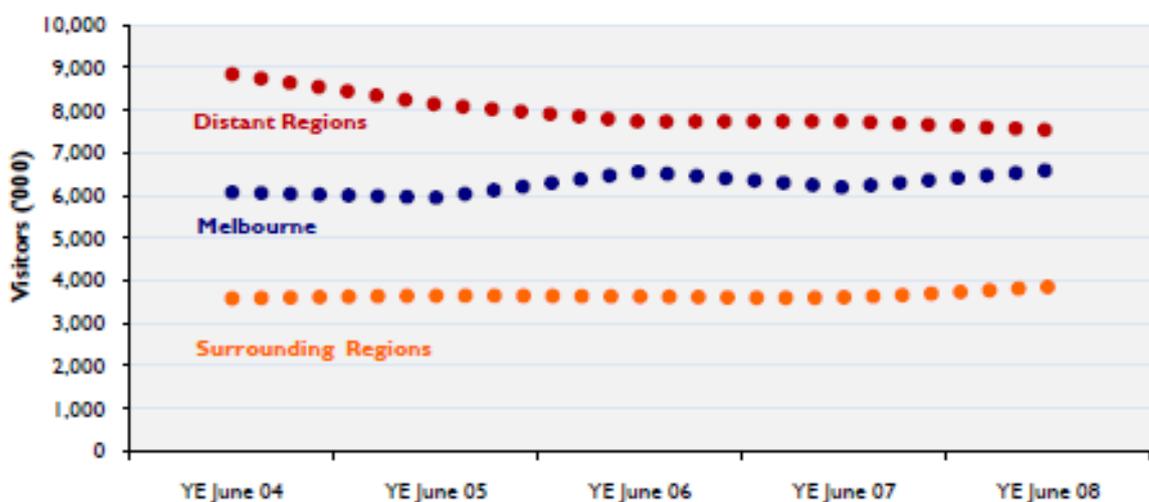
Visitation in Victoria's regions has also not been uniform with a decline in regional dispersal across Victoria.

Driving this trend in Australia:

- Increased competition from overseas destinations
- Changing consumer expenditure patterns
- Growth in low cost airlines
- Increases in domestic travel costs, including fuel prices
- High levels of consumer debt and a preference (especially among young adults and families with children) to spend discretionary income on savings, servicing debt or purchasing consumer items
- Labour market changes and lessening employment security leading to a tendency to postpone holidays or take shorter breaks.

Figure 9 illustrates this decline. It shows how 'surrounding destinations' to Melbourne have had steady visitation whereas 'distant regions' (such as Echuca-Moama and District) have experienced a decline in visitation over the last five years. On the other hand there has been growth in visitation to Melbourne (metro) during this same period.

Figure 9 Domestic overnight visitor dispersal in Victoria (Tourism Victoria, 2009)



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

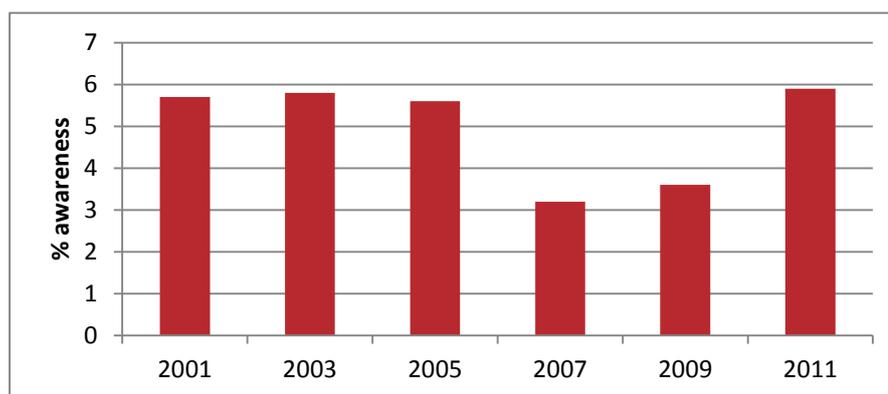
3.2 Visitor assessment

3.2.1 Destination awareness

The 2011 Regional Awareness and Perceptions Survey (RAPS) for the Murray Region¹ showed an increase in the awareness of Echuca-Moama as a short-break and holiday destination. This placed Echuca-Moama as the eighth most 'recalled' destination in Victoria.

However, Figure 10 illustrates that despite the recent increase in awareness of Echuca-Moama the total awareness for the destination was at similar levels in 2001 – 2005.

Figure 10 Unprompted awareness of Echuca-Moama (RAPS, 2011)

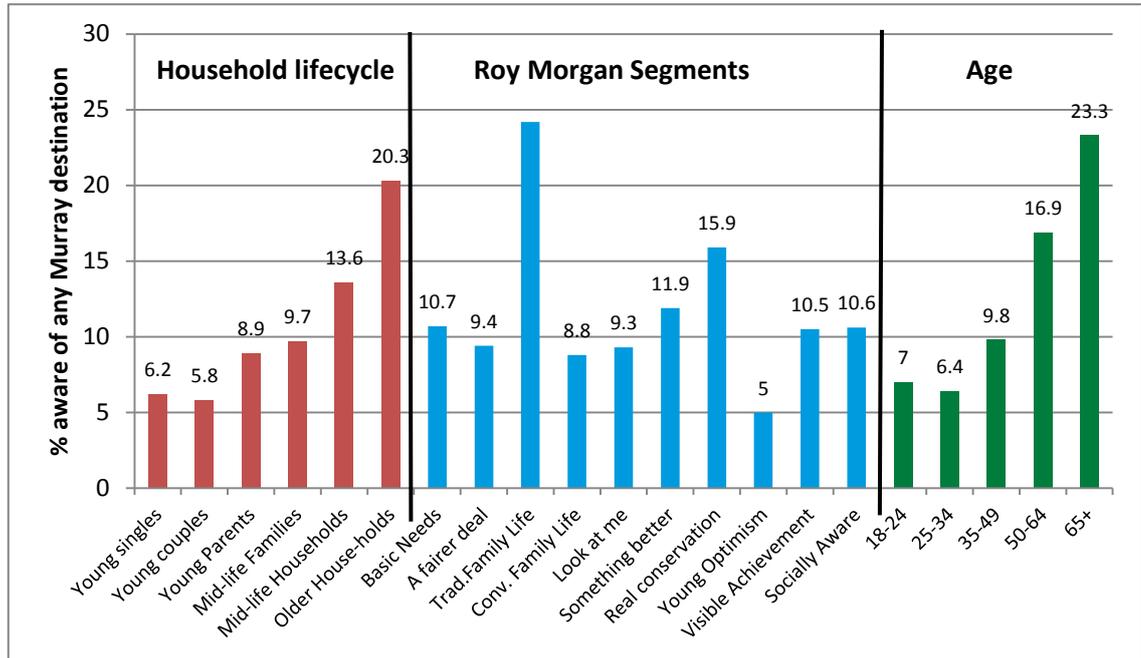


The 2011 RAPS also showed a correlation between age group and household lifecycle with unprompted awareness of the Murray Region as a holiday destination. Figure 11 shows that awareness of the Murray increases with age and maturity of the household lifecycle. For example 23.3% of respondents aged 65+ were aware of the Murray Region compared to 9.8% of 35-49 year olds.

Figure 11 also clearly shows that the 'traditional family life' Roy Morgan Values Segment has the highest awareness of the destination with 24.2% of respondents. Awareness by the 'socially aware' segment has increased in recent years. However, Tourism Victoria believe this may be partially due to the floods in the region which provided significant media exposure of the region (Tourism Victoria, personal communication, 2012).

¹ The RAPS for the state of Victoria is undertaken by Roy Morgan Research for Tourism Victoria every two years, uses a computer assisted telephone survey method across selected Australian states, with a sample size of approximately 1000 each survey round.

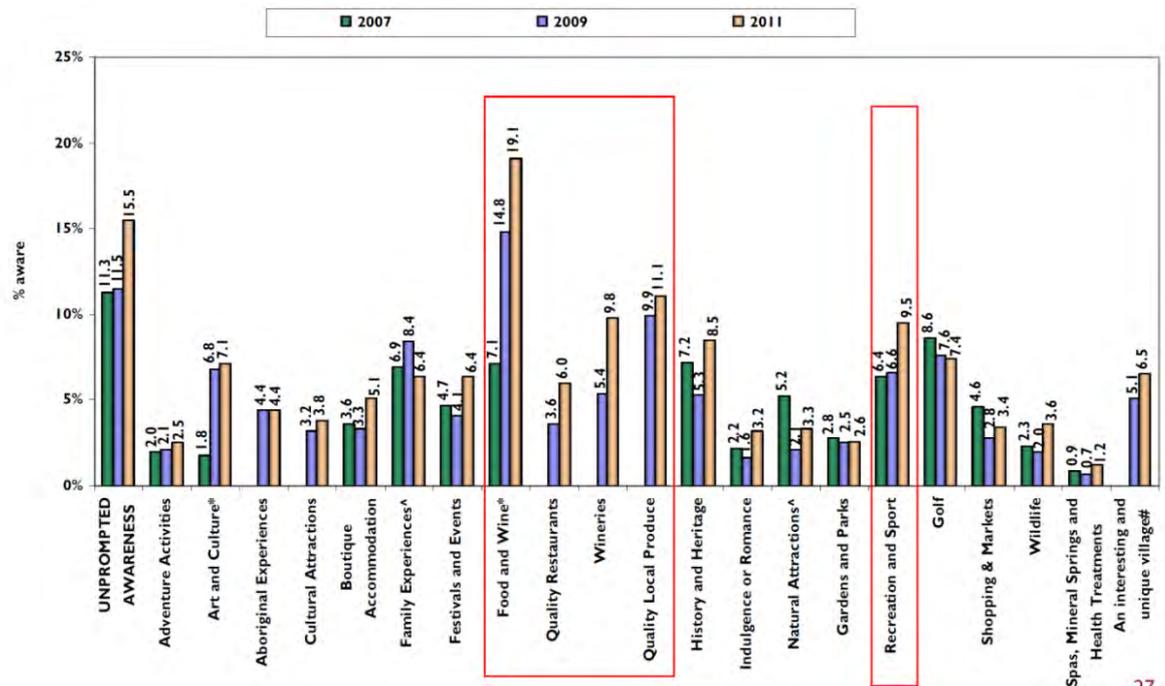
Figure 11 Profile of respondents with unprompted awareness of the Murray Region (RAPS, 2011)



3.2.2 Market perceptions

The 2011 RAPS of the Murray Region provides insight into what people think and associate with the Murray Region. It shows people's associations with the Murray Region over time. This is presented in Figure 12. It shows responses to the question 'which places in Victoria excluding Melbourne do you associate with...'

Figure 12 Key associations with the Murray Region (RAPS, 2011)



The key insights from Figure 12 are outlined below.

Food and wine related

- All food and wine related categories have increased noticeably from 2009 to 2011.
- The largest increase in awareness was 'food and wine' and 'wineries'.
- The awareness of the Murray Region with food and wine is second only to the Yarra Valley out of Victoria's regions.
- The awareness of the Murray Region with quality local produce is now the highest across all of Victoria's regions.

History, heritage and culture related

- Awareness has increased or remained steady for all history, heritage and culture related categories from 2009 to 2011.
- However, the increase was smaller than for the food and wine related categories.
- The awareness of history and heritage in the Murray (8.5%) is less than the goldfields (42.9%), Great Ocean Road (9.1%) and Victoria's High Country (9.5%).
- Awareness of 'Aboriginal experiences' and 'Cultural experiences' remains low.

Nature-based

- The awareness of all nature-based categories such as 'natural attractions', 'gardens and parks' and 'wildlife' in the Murray remains low.
- The awareness of 'natural attractions' and 'gardens and parks' decreased in 2011.

Golfing, recreation and sport

- There has been a steady decrease in awareness of 'golfing' in the Murray Region from 8.6% in 2007 to 7.4% 2011.
- The Mornington Peninsula has greater awareness of golfing than the Murray.
- On the other hand there has been an increase in awareness of 'recreation and sport' in the Region.

Family experiences

- Awareness of 'family experiences' has decreased in the Murray from 2007 to 2011.

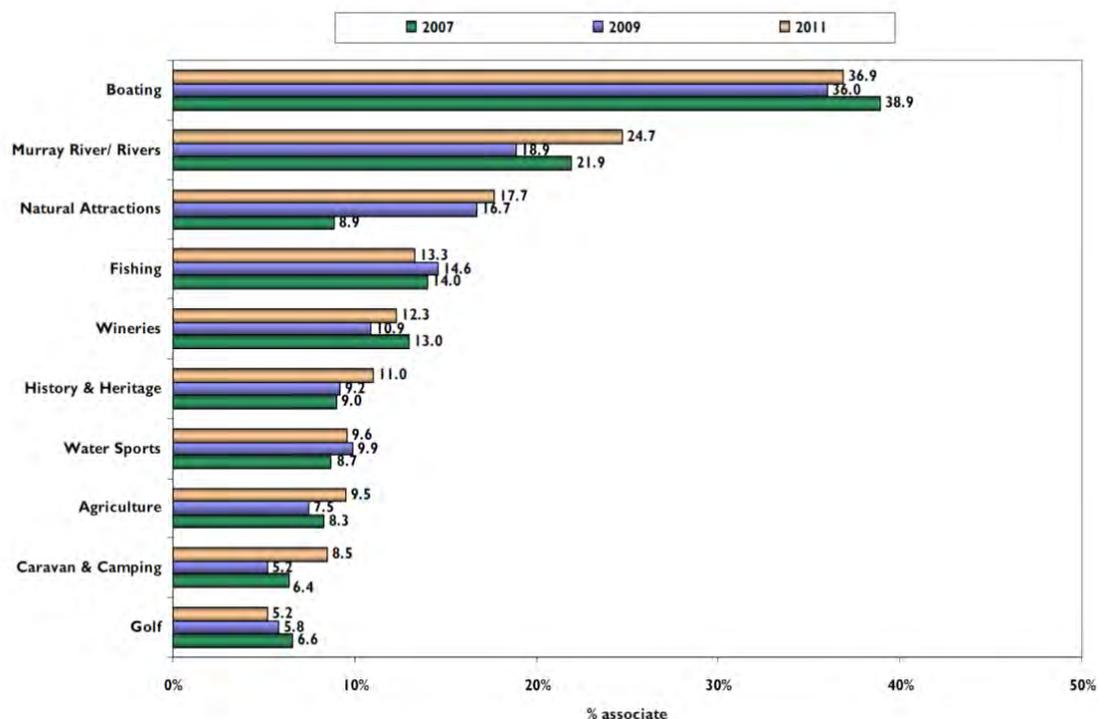
Festival and events

- There has been an increase in the awareness of festivals and events.

In addition to the unprompted awareness outlined above, the 2011 RAPS also provided insight into people's perceptions of the Murray through prompted awareness i.e. top of mind associations. Figure 13 shows that the majority of top of mind associations with the Murray Region are related in one way or another to the River and its activities. This includes 'boating' 38.9%, 'Murray River' 21.9%, natural attractions 17.7%, fishing 13.3% and water sports 9.6%.

Other insights from the Survey are the steady decline in 'golf' as a top of mind attribute of the Region. 'History and heritage' also remains strong at 11% and wineries at 12.3%.

Figure 13 Top of mind attributes associated with the Murray Region (RAPS, 2012)



3.2.3 Visitors to Echuca-Moama and District

The visitors to Echuca-Moama and District are described below. Visitors have been categorised as 1) domestic overnight visitors, 2) domestic day visitors, and 3) international visitors. This is provided as a summary with further information available from MRTB, Tourism Research Australia and Data Insights into specific market groups.

Across all the visitor groups the main purpose of visitation was for holiday or leisure, followed by visiting friends and relatives.

Domestic overnight visitors

- High proportion of visitors from Victoria (85.7%).
- Visitors stayed for an average of 2.8 nights, below the Murray average of 3.1.
- Activities undertaken by overnight visitors in the Central Murray are provided in Figure 26 in the appendix. It includes a comparison against the other sub-regions and the average for the Murray. The Central Murray has a higher percentage of overnight visitors undertaking a charter boat cruise or ferry ride and water activities and sports than in any of the other sub regions.
- In the Broader Murray Region there has been a decline in visitation by all age groups except the 65+ age demographic (MRTB, 2012b).

Domestic day visitation

- They were more likely to be older couples, aged 45-54 years, followed by younger singles aged 15-24 years.
- The percentage of visitors that participated in activities in the Central Murray compared to the other sub-regions is shown in the appendix. The Central Murray region has a higher percentage of day trip visitors undertaking general sightseeing, and a charter boat cruise or ferry ride, than in any of the other sub regions.

International visitors

- The majority of visitors are from the United Kingdom, New Zealand, the United States, and Europe.
- International visitors have higher than average levels of participation in:
 - Nature based activities, including visit National and State Parks, visit wildlife parks/zoos/aquariums, bushwalking/rainforest walks and visit the outback,
 - Water based activities, either charter boat/cruise/ferry,
 - Visiting a winery, or farms (MRTB 2012b).

3.2.4 Visitation by market segments

The MRTB identified a number of niche market segments in the Draft Market Research Paper 2012. Key characteristics and trends of each market segment are shown in Figure 14.

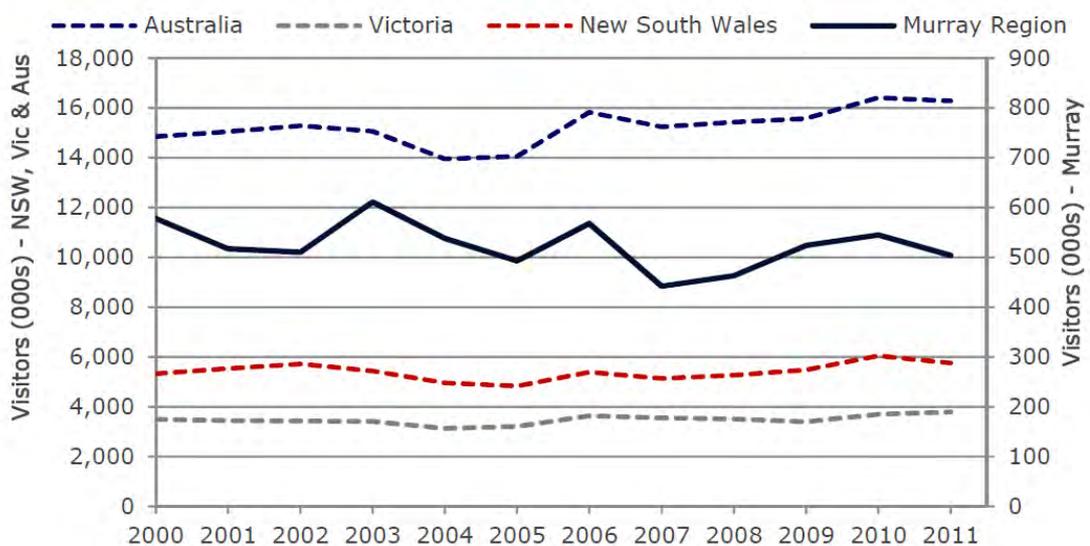
Figure 14 Characteristics of market segments MRTB, 2012

Segment	% visitation Murray	Characteristics
Food and wine	29%	Slightly higher in the Central Murray sub-region Have a greater tendency for longer stays than average visitors High proportion of the segment also undertake social activities (90%) and visit local attractions or tourist activities (>65%)
Fishing	24%	Number of fishing trips to the region down 13% from 2001-2003. Significant decline in mid-eastern sub region Generally this segment does not do other things in the region except social activities such as eating out and pubs and clubs Lower yield than the average visitor to regional VIC and NSW
Golf	15%	Significant decline in participation in the Central Murray sub-region from 2001-03 to 2009-11 This reflects the decline in the Murray Region MRTB (2012b) states this decline may be a result from increased competition of new golf courses in Melbourne's surrounding areas This segment does little else outside of social activities
Festivals and events	16%	Participation is declining in both the Central Murray and the broader Murray Region Recognised as an important segment as can attract new visitors and profile the region to new visitors during the event
Water sports	7%	Central Murray sub region has the highest participation rate in water sport activities Limited cross over into other activities except social activities and to a lesser degree outdoor or nature activities
History and heritage	43%	Increase in participation in 2011 particularly in the Eastern Murray and Western Murray with a decline in the Central Murray sub-region Importantly over 30% of visitors who undertake a history or heritage activity on their trip do not do so in the Murray Region (i.e. they do within another region). This shows that there may be spare capacity for these activities within the region There is also a lower propensity to undertake outdoor or nature activities by this market segment than compared to other segments

Segment	% visitation Murray	Characteristics
Private vehicle touring	25-30%	Around 25% - 30% of visitors to the Murray Region take more than one stopover during their trip. This is believed to be increasing Difficult segment to assess and analyse due to data limitations
Houseboats	n/a	16,000 house boats trips on the Murray per annum, with over 60% originating in Echuca and 20% in Mildura
Nature based tourism	35%	Participation declined from 40% in 2001-03 The decline in the Central Murray was greater than for the overall Murray. In contrast the market share has grown in the Eastern and Western sub-regions. Importantly around a third of people staying in the Murray are undertaking their nature-based activity somewhere else on their trip. This shows that there may be spare capacity for these activities within the region
Family		Family visitation to the Murray has declined between 2000 and 2011 by approximately 13%. (Refer to Figure 15) In comparison Victoria, NSW and Australia has all increased by approximately 10%. Other surrounding regional areas such as the NSW Riverina also experienced an increase during this period The average length of stay for families is 3.3 nights per trip. This is above the average for all market segments of 3.1 nights

Figure 15 shows that family visitation to the Murray decreased over the last ten years against the National and State trends. However, visitation has increased since a slump in 2007. Many local stakeholders believe the most recent decline from 2010 – 2011 was a result of flooding in the Region. They believe that visitation by families would have continued on its growth trend since 2007 if the flooding had not occurred.

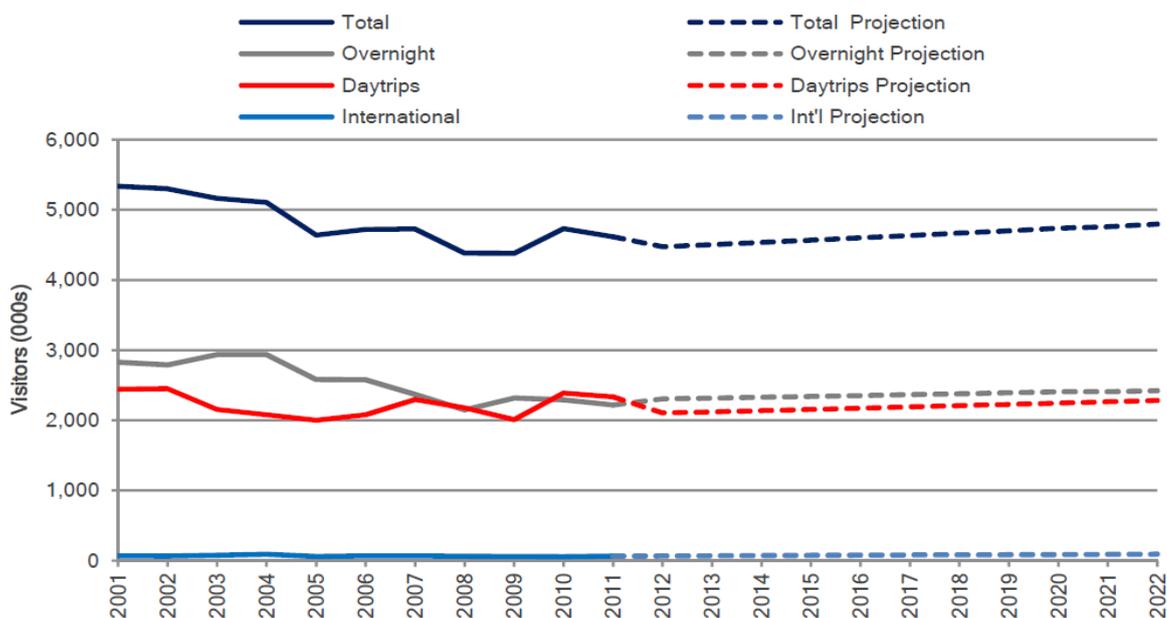
Figure 15 Domestic family trips 2001 – 2011 (MRTB 2012b)



3.3 Visitation forecasts

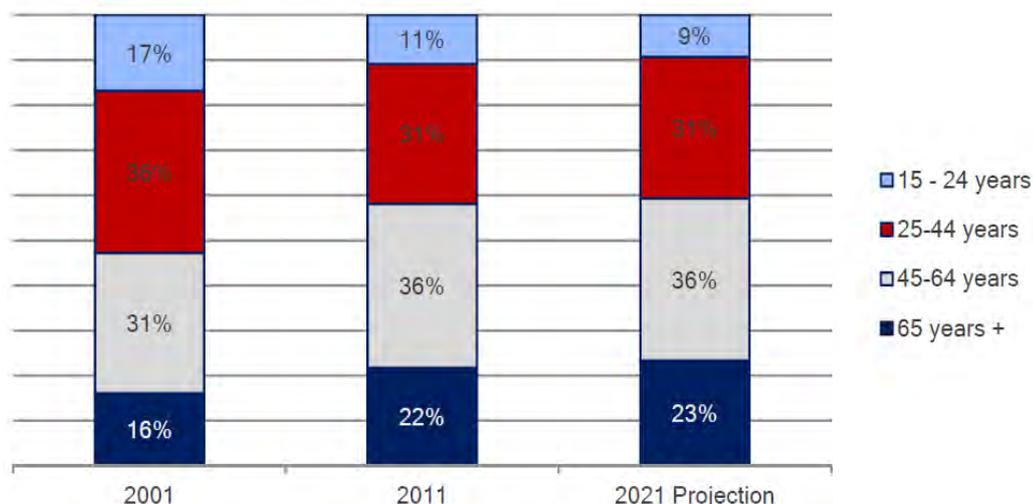
MRTB 2012b provides a visitation forecast that the region will experience a small growth projection over the following decade to an additional 4% of visitors by 2022. However, this level is still below the number of visitors in the region in 2004. Forecast visitation for overnight and day visitation is shown in Figure 16.

Figure 16 Forecast visitation to the Murray Region (MRTB 2012b)



The analysis undertaken by MRTB projects that there will be a continued aging of visitors to the Murray over the next decade. By 2021 it is projected that only 40% of overnight visitors will be aged between 15-44 years. This is shown in Figure 17.

Figure 17 Forecast age projections for the Murray Region (MRTB 2012b)



3.4 Market evaluation

3.4.1 Murray Region target markets

Previous target market

The 'Murray Meanderers' were identified by the Murray Campaign Committee as the target market for the Murray in 2007. They were defined as Australians aged 30-64, medium to high spenders, frequent travellers or those who take long trips, and those who show a tendency to partake in activities that align with identified Murray product strengths in their day to day lives or whilst on holiday. When matched with those who are visiting the Murray Region and Echuca Moama and District now, the actual visitor market and target markets are aligned.

Newly developed target market

As part of the recent brand review for the Murray region, the MRTB revised their target market. The target market for the Murray will be:

Interested, open and active people who find the demands of modern life often compromise their relationships with themselves and those around them. They view regional Victorian holidays as the chance to get back to nature and the beautiful simplicity that brings. These people are happy to travel for new experiences that'll keep everyone happy with reasons to be active, involved and engaged.

Further details on the target market will be available pending release of the MRTB Strategy. However, it is understood from discussions with MRTB that future marketing will focus on the experience the visitor seeks rather than be constrained by demographics.

3.4.2 Echuca-Moama and District target markets

The current target markets of Echuca-Moama and District are outlined in the EMDTA *Marketing Plan 2012-13*. They are based on the Roy Morgan values segments. They include:

- Socially aware (priority market)
- Traditional family life
- Conventional family life
- Visible achievers

An overview of the Roy Morgan segments is provided in the appendix. An assessment of each of these segments with the destination and its experiences is provided in Figure 18.

Figure 18 Assessment of Target Markets

Market segment	Market characteristics	Alignment with the region	Strengths of the destination with the target market	Barriers to visitation by the target market
Traditional family life	19% of population	★★★★	<ul style="list-style-type: none"> Overall, good match to experiences and products in the region Suited to history and heritage theme and branding (they like reliving the past) The Port of Echuca redevelopment – especially the interpretation, will be well received by this market Customer service, accommodation and dining match expectations Well matched to the profile of the region as a place to spend quality time with friends and family (83% visitors agreed with this according to TRA, 2007) Suited to golfing, fishing, houseboat and vehicle touring experiences of the region 	<ul style="list-style-type: none"> Cost is a big consideration. Visitation may be impacted by economic circumstances beyond control of the Region High demand for ‘free’ experiences such as gardens and parks. Limited recreational areas in Echuca-Moama compared to other competing destinations
Conventional family life	10% of population	★★★	<ul style="list-style-type: none"> Suited to the informal nature-based tourism experiences of the river and forests along with campgrounds and resort parks Easy access from Melbourne (key origin market) in terms of travel distance and cost Suited to the family friendly experiences and events that the region has outside of Echuca-Moama 	<ul style="list-style-type: none"> More likely to forego a holiday in the current economic climate in favour of other consumer goods Restrictions in newly designated National Park (e.g. not able to take the family dog on holiday anymore if camping in the park may impact on visitation)

Socially aware	11% of the population	★★★	<ul style="list-style-type: none"> • This segment in particular seeks new and different experiences. This is not well matched to the perception of the Region and its products. A TRA survey in 2007 only identified that 54% of respondents visited the region with the expectation to 'discover or learn something new' • Emerging nature-based tourism experiences would be better suited to this segment • Emerging wineries and food related experiences (e.g. quality farmers markets) are suited to this market • Good match for the unique cultural events the region has (e.g. winter blues festival) • Suited to private vehicle touring and house boating activities of the region 	<ul style="list-style-type: none"> • Are time poor and may favour closer destinations to key market of origins such as Melbourne • There is limited formal nature-based tourism product and infrastructure at present as a drawcard for this market • High outbound travel. Will travel more often overseas and current exchange rate provides attractive incentive for this
Visible achievers	16% of population	★★★	<ul style="list-style-type: none"> • Suited to 'soft' nature experiences and scenery (although do not want an ecotourism experience) • Suited to family orientated events, the emerging winery and food trail, and the region's golf courses • 55% trips are for rest and relaxation (MRTB 2012b) • Prefer holidaying away from cities and crowds (MRTB 2012b) 	<ul style="list-style-type: none"> • Lack of higher quality family based activities desired by many of this market segment • High competition for this market segment by other destinations • Many of this segment are time poor. May be a barrier for visitation from Melbourne based market

TRA, Echuca-Moama Visitor Profile and Satisfaction report, 2007

The assessment of the target markets in Figure 18 shows that the priority target market 'socially aware' is not the most aligned to the product and experiences in the Region. Instead the 'traditional family life' segment is currently better aligned.

The geographic target regions are also outlined below including 'key' and 'secondary' geographic markets. These are:

- **Key targets** – Melbourne, regional Victoria and Southern NSW
- **Secondary targets** – Adelaide, Sydney and New Zealand.

An assessment on the number of visitors from each market of origin is provided in Figure 19. It shows that the majority of visitors are from regional Victoria and Melbourne. Regional NSW and Sydney have a small share of total overnight visitation and visitation by each international market is less than 1%.

Figure 19 Visitation by market of origin of 'key' and 'secondary' geographic markets (Data Insights, YE Sept 2011)

Market	Region	Total overnight visitation	%
Key markets	Melbourne	182,900	34.6%
	Regional Victoria	256,100	48.5%
	Regional NSW	24,800	4.6%
Secondary markets	Adelaide	Unknown	Unknown
	Sydney	13,200	2.4%
	New Zealand	1300	0.2%



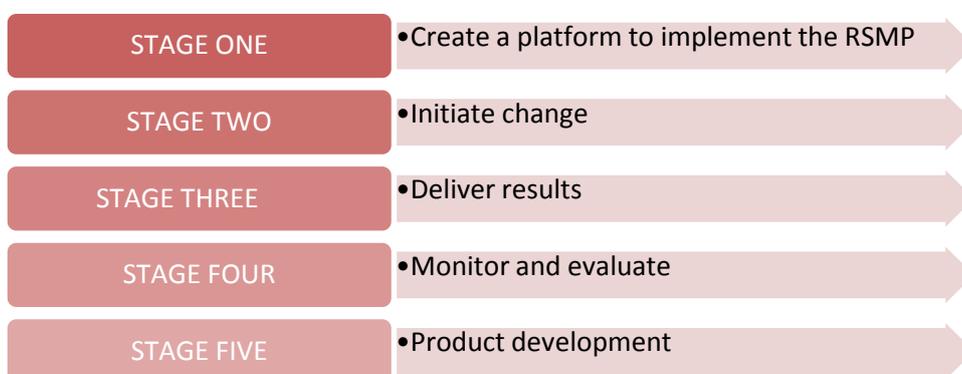
4 Strategic Plan

4.1 Overview

Change is required. Without a change in the approach to destination marketing in Echuca-Moama and District overnight visitation may continue to decline.

Change is often not popular and requires people to think and act differently. Change also affects stakeholders in different ways. For this reason change can be challenging to implement and should be undertaken overtime. This strategy recognises the current situation in Echuca-Moama and District and its challenges. These challenges have shaped the delivery of the Plan. In particular, structural changes within the tourism industry must be undertaken before a new strategic direction can be implemented.

This is clearly identified in the five stages of the Strategic Plan:



Stage five 'product development' is outside the scope of the RSMP. However, it has been included at a top line level as its integration with marketing is critical to the successful implementation of the Strategy.

The proposed three-year RSMP is also just the starting point and many strategies proposed in the Plan will take more than three years to complete. It is the first steps towards implementing a strategy that will best position the destination for long-term tourism growth and enhance the contribution tourism makes to the local economy and community in the Region.

4.2 Vision

Echuca-Moama and District will be the leading destination on the Murray where visitors can experience the Murray River and surrounding district through activities, stories and people. The natural attributes of the Murray will be supported by a rich events calendar, world-class golfing and great food and wine.

4.3 Goals

Goal	Measurement	Priority	Data Source
Increase visitation	Increase day visitation by 1.5% p.a. and overnight visitation at 1% p.a. over the next three years	High	Data Insights, Echuca-Moama quarterly updates
Increase the length of stay of visitors in the Region	Increase the length of stay in the Region from 2.8 nights to the Murray average of 3.1 by 2016	Med - High	Data Insights, Echuca-Moama quarterly updates
Increase visitor expenditure	Increase visitor expenditure in the region by 1.5% p.a. over the next three years (in real terms)	High	Data Insights, Echuca-Moama quarterly updates
Improve seasonality of visitation	Increase room occupancy in winter (June, July, August) to an average 52% by 2016 ²	Med - High	ABS – Tourist Accommodation, Small Area Data, NSW and Victoria
Enable dispersal into surrounding regions by raising awareness of the destination name 'Echuca- Moama' as the 'hub' to attract visitors.	Increase % of visitors that 'visit a national or state park', 'go on a day trip' and 'other outdoor activities' by 10% by 2016	Med – High	National Visitor Survey Data (custom report will be required)
Raise satisfaction of visitation	Increase the percentage of visitors satisfied with their visit from 85% (2006) to 90% by 2016. Increase intention of return visitation in the next 12 months from 60% (2006) to 70% by 2016 ³	Med - High	Tourism Research Australia, Echuca-Moama Visitor Profile and Satisfaction Report (custom report)

4.4 Target markets

Section 3 showed that the traditional family life segment is best aligned with the product and experiences in the region. It is recommended that this target group should be the current priority target instead of 'socially aware'. Analysis shows that there is scope for Echuca-Moama and District to increase the market share of the Traditional Family Life segment. However, this can only be achieved through a change in perception of the region as outlined further in the RSMP.

Priority should be given to attracting more visitors from this segment through creating destination awareness and highlighting what there is to see and do thereby increasing spend and length of stay in the district.

² 2011 occupancy rates. Murray Shire: June (41.4%), July (40.7%), August (45.8%); Campaspe Shire: June (43.8%), July (48.4%), August (48.6%) ABS – Tourist Accommodation, Small Area Data 2011

³ Tourism Research Australia, Echuca-Moama Visitor Profile and Satisfaction Report, 2006

Whilst the ‘socially aware’ segment may be less price conscious and have higher disposable incomes to spend on discretionary items such as holidays, they also have a much larger choice of destinations available to them (including offshore), and they seek new, exciting and innovative experiences. Echuca-Moama and District is currently neither positioned nor delivering this type of experience. Therefore, ‘socially aware’ should not be the priority target segment.

In the medium to longer-term a second priority target group should be the conventional family life segment (young families). However, this is dependent on the development of products and experiences to better suit this market segment. This includes ensuring a family friendly experience in Echuca-Moama and District as well as accessible and family friendly outdoor experiences outside of the twin-towns.

A recommendation on target markets is outlined below.

Current target market	Recommended target market (short-term)	Recommended target market (medium to long-term)
Priority: Socially aware	Priority: Traditional family life	Priority: Traditional family life Conventional family life
Secondary: Traditional family life Conventional family life Visible achievers	Secondary: Conventional family life Socially aware Visible achievers	Secondary: Socially aware Visible achievers

4.5 Strategic Plan - summary

There are five stages to the RSMP. These are summarised in Table 1 and outlined in detail later in the report. There is a lot of competition from other destinations along the Murray, in the State and offshore for the Melbourne visitor market. The Plan is focused on repositioning Echuca-Moama and District as a more vibrant, contemporary and active destination that over time will provide ‘soft’ adventure experiences for a younger demographic such as families.

The Region needs to be reinvigorated and reposition itself to remain competitive. Its focus should be on promoting the Murray River and the range of activities and experiences it offers. This includes refreshed history and heritage product and development of more nature based experiences that are linked to the River.

The Plan is about aligning product, brand and marketing to deliver a more ‘active’ and ‘contemporary’ experience to the target markets. It requires a significant shift in visitors’ perceptions to change the way people think and feel about Echuca-Moama and District and how they behave at the destination. The table below summaries the stages in the Plan.

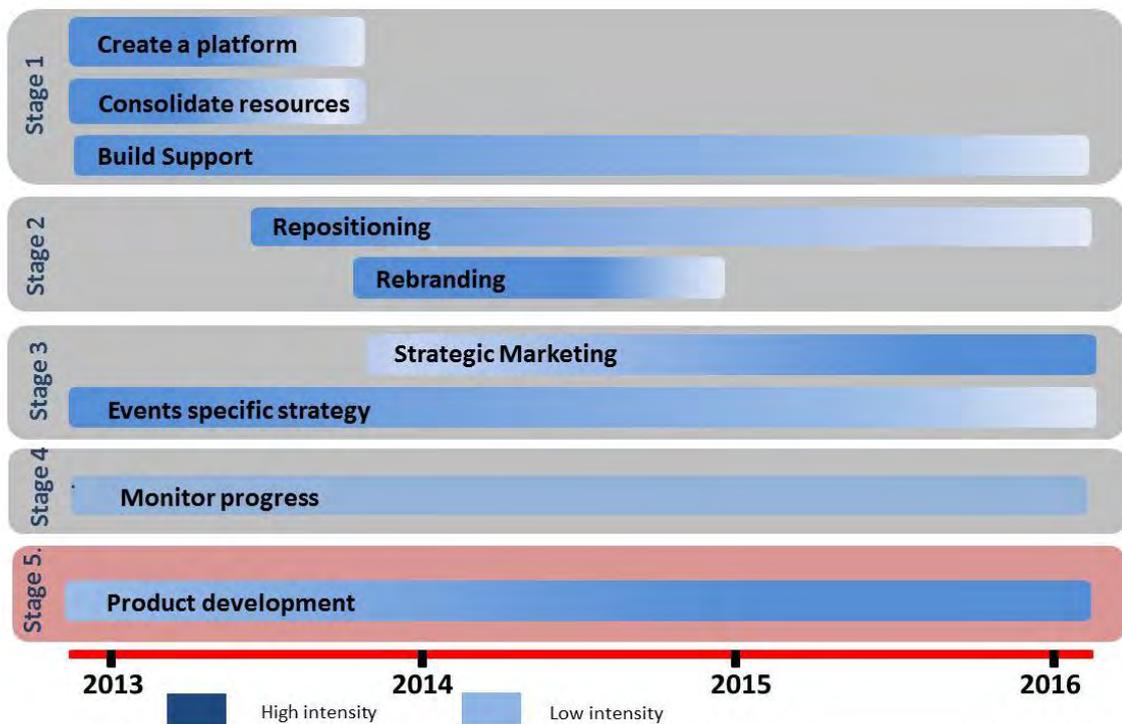
Stage	Focus	Key actions
Stage one: Create a platform to implement the RSMP	Undertake structural changes required to implement the RSMP	<ul style="list-style-type: none"> • Industry restructure • Consolidate resources • Build support
Stage two: Initiate change	Work with industry and stakeholders to change the strategic direction, positioning and brand of the destination	<ul style="list-style-type: none"> • Reposition the destination • Rebrand the destination
Stage three: Deliver results	Delivery of strategic marketing and event specific strategy to change visitors' perceptions of the Region and their behaviour	<ul style="list-style-type: none"> • Be strategic with destination marketing activities • Event specific strategy
Stage four: Measure progress	Track the progress of the Plan and make amendments where necessary	<ul style="list-style-type: none"> • Measure progress
Stage five: Product development	Undertake product development activities to align and support the new strategic direction.	<ul style="list-style-type: none"> • Product development

Table 1 Strategic Plan summary

The timeframe and relationship of each of the stages is illustrated in Figure 20. Timeframes are indicative only. The Plan will be implemented by EMDTA, with support by Murray Shire Council, Shire of Campaspe, LTAs and industry.



Figure 20 Timeline of implementation of the RSMP



4.6 Stage one - create a platform to implement the RSMP

4.6.1 Restructure of destination marketing processes

The region requires role clarification and structural adjustment ahead of the implementation of the RSMP. The restructure is seen as critical to the success of the RSMP. It must be completed before stage two of the RSMP can commence.

TRC Tourism developed a separate discussion paper for the RSMP Steering Committee on potential industry structures. Feedback was considered in the proposed restructure. The restructure will align the efforts of stakeholders, reduce inefficiencies and provide a platform to implement the RSMP. This will be achieved through:

- A clear strategy that will be set and implemented by EMDTA.
- A more coordinated approach to destination marketing with clear messages and communications managed centrally by EMDTA
- Greater leverage, budgets and capacity to target markets through an aligned approach of tourism organisations across the region
- Marketing campaigns delivered by EMDTA using skilled marketing staff and resources
- Greater stakeholder engagement in regional strategy through the networks of EMDTA and its independence from local government
- Greater flexibility for EMDTA to implement appropriate marketing campaigns
- Well identified roles and responsibilities that will enhance and promote efficiency.

Without this restructure it is unlikely that elements of the RSMP can be implemented successfully. It is recommended that the restructure be undertaken in two Phases. Phase 1

should be undertaken immediately and Phase 2 could be implemented over time. A plan for the roll out of the restructure will need to be developed by the Councils and EMDTA.

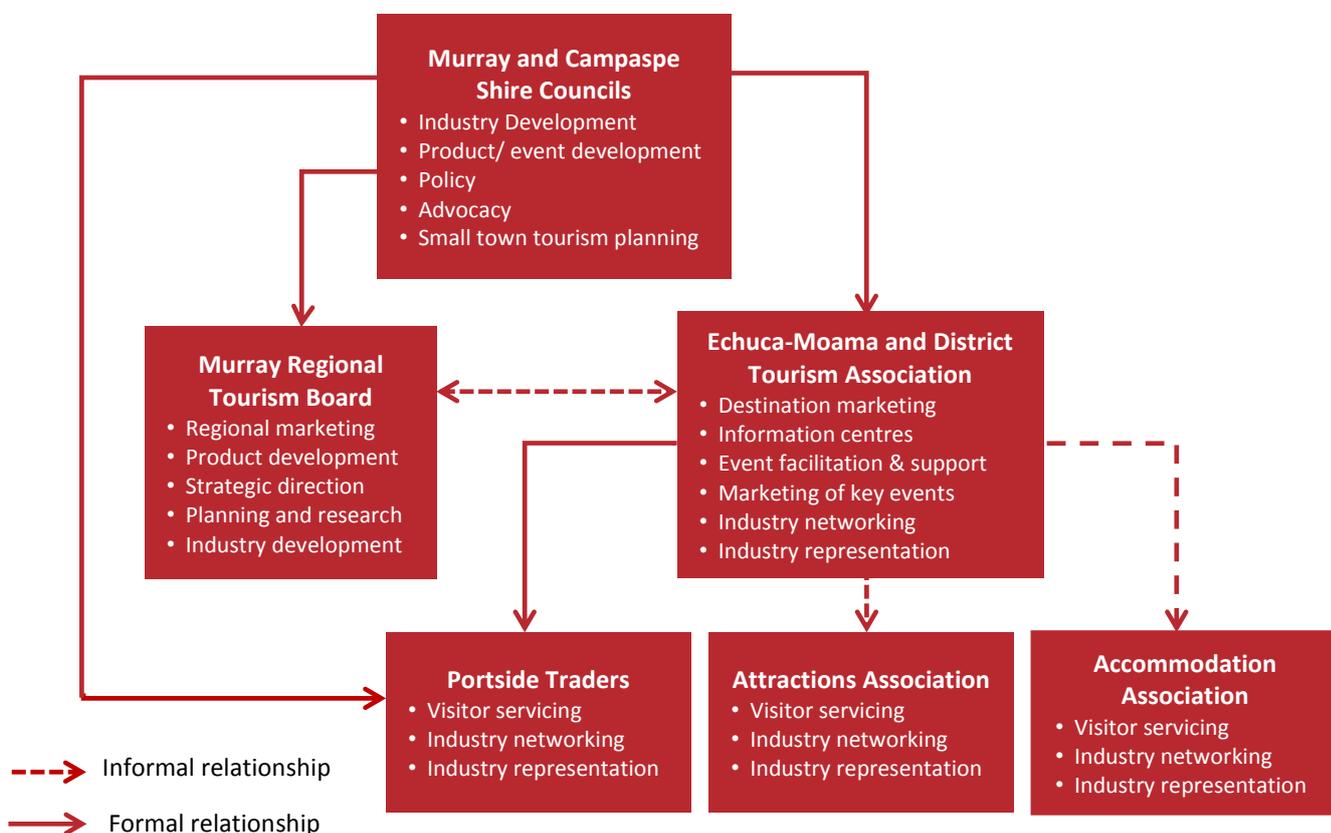
Phase 2 is focused on providing a structure to enable broader collaboration across the Murray Region’s sub-regions. Buy in to the strategic direction of the MRTB by EMDTA and the Councils will be essential for this structure to be effective.

Phase 1: industry structure

The Phase 1 industry structure is outlined in Figure 21. The key elements are:

- Murray Shire Council and Shire of Campaspe continue to provide funding for EMDTA and the MRTB.
- Murray Shire Council and Shire of Campaspe continue to manage product and industry development including event development (with strategic support from EMDTA)
- EMDTA remains responsible for destination marketing. This would be undertaken in alignment and with strategic input and support from the MRTB on an ongoing basis.
- No destination marketing activities undertaken by LTAs
- All Council funding for tourism marketing activities to be channelled through EMDTA
- EMDTA to have more of a leadership role in LTA activities. All LTA funds for destination marketing provided to EMDTA
- Clarification on the roles and responsibilities of all organisations (through existing and additional service level agreements)
- Rationalisation of the LTA’s may also be required to reduce inefficiencies
- EMDTA is responsible for visitor services and dispersal in the region.

Figure 21 Short-term industry structure

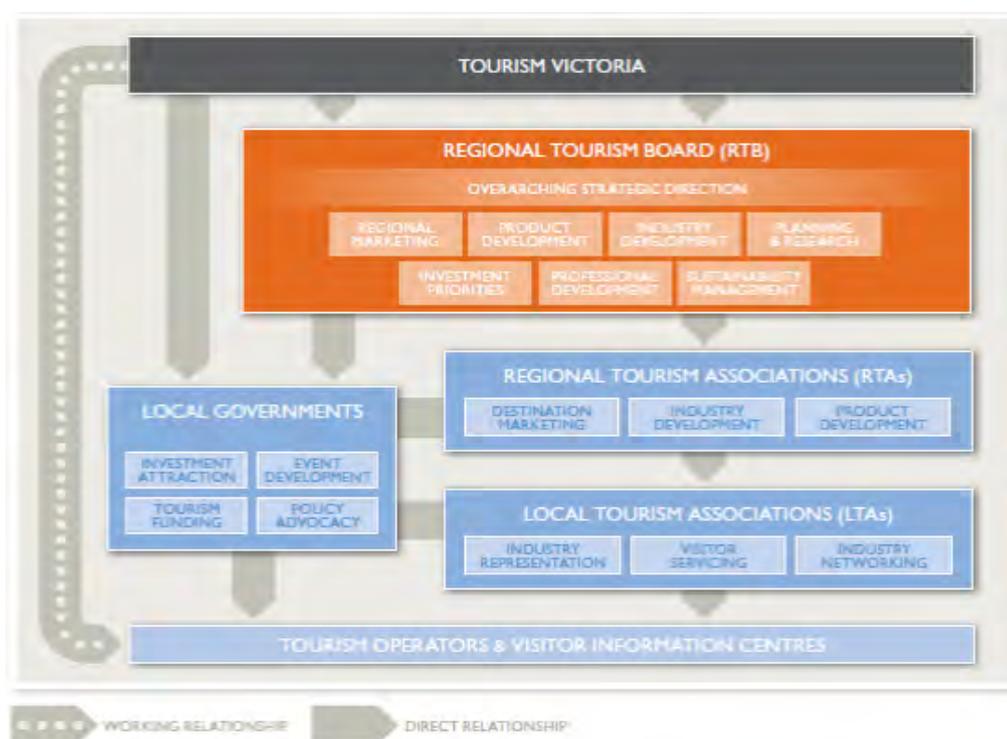


Phase 2: industry structure

In the longer term a more unified approach to destination marketing across the Murray Region may be required. However, it is unlikely that it would be required during the three-year period of the RSMP. This structure is dependent on the collaboration of all the sub-destinations in the Murray and success of MRTB in developing into an effective Regional Tourism Board.

In the longer-term Tourism Victoria's potential model for evolving industry structures in regional Victoria should be considered as a structure for the Region. This is shown in the diagram below. This structure may be appropriate for the Murray Region with the amendment that the responsibility of visitor servicing would remain with EMDTA.

Figure 22 Long-term industry structure



source: Tourism Victoria, Regional Tourism Action Plan (2009-2012)

Tourism Victoria's 'potential model' would only be possible with changes to the current culture and practices of destination marketing in the Region. Conceptually it would present significant opportunity to empower the Region, but it is believed that the practicality of the MRTB to work with 14 Councils and 2 State governments needs to be demonstrated for industry to have confidence in the structure.

Advantages of this structure compared to the Phase 1 structure are that it would:

- provide a stronger platform for strategic positioning of the region
- better alignment of product and industry development with destination marketing
- increase opportunities for developing the profile / awareness of the region to broader markets through the MRTB.

Key outcomes:

- Implement Phase one of the tourism industry restructure
- Clearly defined roles and responsibilities of all tourism organisations
- EMDTA responsible for all destination marketing activities
- Assess the appropriateness of the Phase two industry structure in 2016

4.6.2 Consolidate resources

The RSMP will be implemented by EMDTA. EMDTA's current funding from Councils and members has enables tactical marketing only to be undertaken to maintain a presence in the market. The resources currently available to EMDTA are insufficient to implement a more strategic approach to destination marketing required in the RSMP.

An indicative budget for the implementation of the RSMP, and a move towards a more strategic destination marketing approach, is outlined in Table 2. The majority of the funding, over and above current resourcing, is required for brand development in stage one and destination marketing activities in stage two and three. Both of these activities would be undertaken by EMDTA.

The budget is indicative only and it is recommended that EMDTA determine a more specific budget on consideration of the RSMP and use of existing marketing budgets.

Stage	Key activities	Budget		
		Year 1	Year 2	Year 3
Stage one	Facilitation / administration / consultation	\$10,000	\$2,500	\$2,500
Stage two	Design / production / collateral	\$50,000	\$15,000	\$5,000
Stage three	Tactical marketing / event development	\$40,000	\$100,000	\$100,000
Stage four	Research and survey	\$2,500	\$2,500	\$2,500
Stage five	Product development	undetermined		
TOTAL		\$112,500	\$120,000	\$110,000

Table 2 Additional resources required to implement the RSMP

Table 2 indicates that approximately \$112,500 of additional funding is required to implement the RSMP in year one, \$120,000 in year two and \$110,000 in year three. The funding required to support product development in stage five has not been estimated. Without additional funding as outlined in Table 2 the implementation of the RSMP will be constrained and compromises to the Plan will be required.

It is recommended that Murray Shire Council and Shire of Campaspe continue to undertake an assessment of funding provided to tourism-related organisations, as well as their own engagement in tourism with the view to consolidate resources for the implementation of the Plan.

Savings identified by the Councils through rationalising other tourism-related expenditure should also be consolidated and provided to EMDTA for the implementation of the Plan. For example the management of the Northern Region Touring Map and its associated budget should be included in the responsibilities and budget of EMDTA.

If sufficient resources are not able to be secured from consolidation of the marketing funding or savings by rationalising other tourism-related activities then alternative revenue streams should be investigated by EMDTA, Councils, and industry. This could include a levy on businesses that benefit directly from tourism. A rate levy is currently being considered by Campaspe Shire (but not likely in Murray Shire due to various reasons including legislative constraints).

If resources are constrained the implementation of the Plan will require prioritisation of tasks. The Implementation Plan includes a priority rating for each of the scheduled activities.

Key outcomes:

- EMDTA to estimate budget required to implement the RSMP (including potential sub contracting of specific activities)
- Assessment of current funding for tourism-related activities undertaken
- Additional funding through savings, or alternative revenue streams consolidated.

4.6.3 Build Support

There is low awareness amongst industry of the current strategic direction for Echuca-Moama and District or the Murray Region. A focus needs to be on increasing the awareness and building industry confidence through the RSMP.

The RSMP cannot be achieved without support from industry, the community and key partner organisations. This will require ongoing consultation and engagement.

In particular, it is important that the local tourism industry feel ownership of the RSMP and align their efforts and activities with the Plan. EMTDA must communicate the strategy and provide leadership in this capacity. Industry need to be aware of why the Plan is required, what it will achieve and how it will be implemented.

Similarly, community support is required for elements of the RSMP to be effective. The community also needs to understand, believe and support the brand.

It is recommended that an Industry and Community Communications Plan be developed to achieve this outcome that should include regular engagement through workshops, meetings, newsletters, press releases, and potentially online feedback platforms.

In addition, partnerships should be identified, developed and leveraged. In particular partnerships should be investigated with Parks Victoria and the NSW National Parks and Wildlife Service (NPWS) given the proposed strategic direction outlined later in the Plan.

Key outcomes:

- Industry and Community Communications Plan developed and implemented
- Industry aligned and supportive of the strategy and EMDTA activities
- Community supportive of tourism and its direction
- Partnerships identified, developed and leveraged.

4.7 Stage two – initiate change

4.7.1 Repositioning

Repositioning of Echuca-Moama and District is required to better align the product offerings of the region with target markets. It will also position the region for long-term growth.

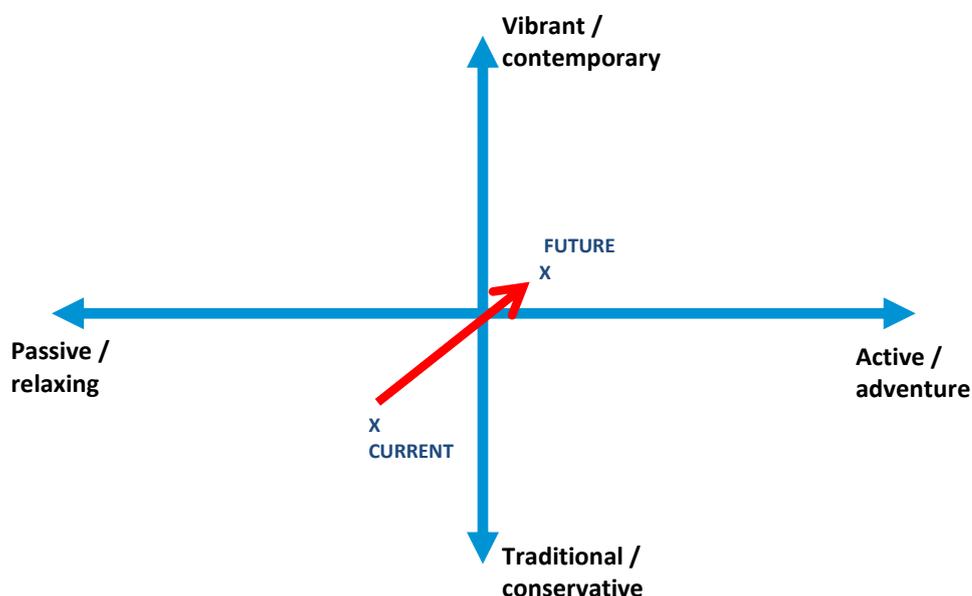
The repositioning is summarised in Figure 23. It recommends that the destination should position itself from being perceived as a 'passive / relaxing' and 'traditional / conservative' destination towards one that is more 'active' and 'contemporary/vibrant'.

Based on the USPs identified in the analysis it is recommended that the repositioning of the destination be along the lines of: "the most accessible destination to explore and uncover the natural and historical marvels of the Murray River and surrounds".

The core elements of this repositioning are:

- Key drivers of visitation need to be maintained yet repositioned to incorporate a more contemporary feel
- History and heritage remains a key attribute of the region but does not define it entirely. It should become more participatory, engaging and lively to fit in with the more contemporary repositioning of the destination
- Experiencing the region outside of the urban areas through 'soft' adventures such as river experiences (e.g. kayaking trails, walking trails, boat rides), supported by non-river activities such as farm gate food and wine experiences
- 'Things to do and fun for the family, not just the oldies'
- Accessible soft adventures – the ability to get out, interact, and explore the history and nature of the Murray River.

Figure 23 Brand positioning of Echuca-Moama and District



Considerations in achieving the desired position are:

- Repositioning will be a gradual process and will require the implementation of all the stages of the RSMP
- To not alienate existing visitors - use gradual changes (especially given that current visitors value the familiarity of the destination)
- Brand management - messages must be clear, concise and correct
- The benefits promised to the visitor through destination marketing must be delivered to visitors or the brand will fail. i.e. experiences must meet expectations

This is a long-term strategy and may not be completed in the three years of the RSMP. Product development activities are also required to reinforce the repositioning. Product development is outlined in stage five.

Key outcome:

- New positioning understood by industry and community
- Shift in potential visitors' perspectives of the destination as a more 'active' and 'contemporary' place to visit
- Region to remain associated with history and heritage but not defined by this attribute
- Product development activities undertaken to provide experience that will support and reinforce the new positioning (stage five).

4.7.2 Rebranding

It is recommended that the destination develop a new brand identity (which could include a logo, tagline, style criteria, hero images etc.) to convey and help establish the new positioning.

The brand identity should reflect the essence, character and values of the destination in order to reposition the region in the target markets' mind. The new brand identity should be consistently executed throughout marketing communications that are undertaken by EMDTA with input from all partner organisations and industry. It will clearly signify to industry that a strategic change in positioning has been undertaken.

Whilst the brand must consider future markets, it must also consider current markets. This is particularly important for the older demographic of visitors that appreciate the familiarity of the destination and are loyal to its current brand.

It is recommended that the brand identity be tested and measured against target markets before its adoption. The development of the brand identity should be outsourced to a professional organisation that specialise in brand development, management and implementation. The brand identity must also consider MRTB's brand strategy, scheduled for release in 2012/13.

For the brand to be a success it is vital that the key values of the brand and the promises that the brand makes to visitors are delivered. This again is linked to product development in stage five. Equally, it is important that industry support and reflect the brand essence and values in their own marketing communications. This will reaffirm the destination positioning and ensure consistency of messages. To enable this to occur, communication of the brand essence and values by EMDTA to the local visitor industry should be a core part of the proposed Industry and Community Communications Plan outlined in Stage one.

Key outcomes:

- Develop a new brand identity to reflect the new destination positioning and signify to industry that a change is occurring
- Brand identity should include a logo, tagline, style criteria and hero images
- Brand identity tested with existing and potential markets
- Brand and key values communicated are reflected in marketing activities of private industry.

4.8 Stage three – deliver results

4.8.1 Strategic approach to destination marketing

A strategic approach to destination marketing is required to implement the repositioning of the destination. The long term positioning strategy for the destination must drive the tactical marketing activities of the destination such as when to advertise, what promotional activities to undertake, which distribution channels to use, and what collateral is required.

Destination marketing should focus on communicating what benefits the target market will get from the destination. It must aim to alter the perceptions of potential visitors in line with the new positioning and brand identity.

This approach will require a shift away from the current emphasis on ‘call to action’ marketing by EMDTA. Call to action marketing may be effective at increasing visitation in the short-term but will not be effective in repositioning the destination. Call to action advertising is often based on discounting and can be detrimental to how the destination is portrayed. It may affect the development of a quality destination image over the longer term.

However, it is recognised that this strategic approach to marketing may initially be unpopular with industry. Only when the long-term strategy and positioning objectives of the RSMP are understood by local industry should strategic destination marketing be undertaken. The shift to a strategic marketing approach should also be undertaken over time to ensure that industry is not alienated during the transition, and will commence only once stages 1 and 2 of the plan have been implemented. In the meantime activities should be undertaken through a revision of the existing EMDTA Marketing Plan as outlined in the next section of the report.

Revise EMDTA Marketing Plan

The scheduling of all destination marketing activities needs to be undertaken by EMDTA. These activities should be outlined in the annual EMDTA Marketing Plan. The Plan must clearly document where destination marketing activities will be undertaken (e.g. the channel), whom they will target, the timing (e.g. leveraging off events, profiling winter activities), what their objectives are and how they will be measured.

It is recommended that EMDTA revise their Marketing Plan to reflect the revised positioning, brand and target markets. A focus should be placed on (1) targeted marketing for specific market segments and (2) further use of alternative distribution channels for more effective results (e.g. other than TV, radio or print advertising).

Marketing activities should be aimed at the target markets outlined earlier in the Plan, with each advertising or promotional opportunity assessed against the readership/ viewer demographics/ psychographics of the target markets. A recommendation by geographic region is outlined in Table 3.

Melbourne	Regional Victoria / NSW	International
Marketing to focus on changing perceptions as per the new positioning rather than call to action activities.	Promotion of festivals and events – potentially call to action marketing to convert day visitors to overnight visitors during events.	Only limited resources should be dedicated to the International market.
Marketing undertaken for special interest / niche segments such as golf holidays	Use publicity to leverage awareness of festivals and events as well as new products and experiences. Opportunity to use media to gain exposure for this ‘news’.	Rather, use partnerships with Tourism Victoria or the MRTB to attract this market segment.
	General marketing activities should focus on changing perceptions.	

Table 3 Recommended strategies by geographic markets

Assessment of previous Marketing Plans identified potential for EMDTA to integrate marketing activities across digital channels. However, the target group of Traditional Family Life are not large consumers of social media in comparison to younger demographics. Social media is best used to supplement and enhance strategies, rather than drive them. The focus of social media should be aimed at conversations and interactions with existing and potential visitors rather than a one way posting of information by EMDTA. The future target group of Conventional Family Life are a younger demographic and will respond and interact with social media more than the current target market.

It is also recommended that EMDTA undertake broader assessment of marketing tools and distribution channels available than those that have historically been relied upon. For example Customer Relationship Management (CRM) processes should be assessed to determine what further opportunities might exist to target current visitors (such as developing an email database of Winter Blues Festival attendees to then promote similar events to the attendees through direct marketing).

Another example may be to use partnerships with golfing publications, associations or groups to directly promote golfing holidays in the region. Joint venture marketing with Parks Victoria and NSW Parks and Wildlife Services (NPWS) as they increasingly provide facilities for visitors could also be very effective. Joint venture marketing opportunities and partnerships may also be effective for specific areas, or specific experience themes within the region together with neighbouring regions or other regions/ sub regions within Australia (e.g. golf networks, wine trails and marketing networks, heritage trails and networks, goldfield regions etc.). EMDTA should undertake a thorough assessment of the opportunities available when revising the Marketing Plan to determine the opportunities best aligned to EMDTA’s strategic

direction. Opportunities may vary from one off promotional initiatives through to longer-term partnerships. This assessment must consider opportunities with partner organisations such as with MRTB on the opportunity to buy into campaigns at subsidised rates must also be undertaken. Resources may be required to be with-held within the budget for activities and opportunities that MRTB may identify as they arise. In particular opportunities to stimulate visitation in low periods should be considered.

A public relations strategy should also be developed by EMDTA to complement marketing activities. This should include identifying opportunities to leverage greater exposure (via media) of the Region through existing activities such as festivals and events.

In summary the RSMP should be used as an assessment tool against promotional opportunities. Only opportunities that align with the RSMP should be considered.

Continue to use and improve the 'hub and spoke' approach

Echuca-Moama and District should continue to be promoted through the 'hub and spoke' approach i.e. the region should continue to be promoted as Echuca-Moama and District with a focus on regional dispersal via Echuca-Moama. The advantages of this approach are outlined in section 2.3.4. However, there are opportunities to improve this model.

There should be a greater focus on the 'soft' adventures and experiences outside of the twin-towns. As additional product is developed (for example a kayak trail in the River Red Gum Forests, wine experience in the northern fringe of Heathcote Wine District, the farmers' market in Girgarre, bird watching at Gunbower wetland) there should be further emphasis placed on these experiences.

The VIC in Echuca is fundamental to the hub and spoke approach. However, local stakeholders suggest that improvements could be made to the VIC's role in regional dispersal. It is recommended that a more formal familiarisation program be developed to ensure that all VIC staff have an excellent understanding of the products and experiences outside of Echuca-Moama but within the shires of Campaspe and Murray. Product update sessions could also be held at the VIC for operators to come in and update staff on a more regular basis.

It is also recommended that improvements to the Echuca-Moama and District website be undertaken to strengthen the role of www.echucamoama.com in facilitating regional dispersal, focusing on experiences that showcase the renewed positioning. It is suggested that the development of an interactive map to showcase day trip itineraries be evaluated by EMDTA.

The core experiences of the region should also be profiled on the home page of www.echucamoama.com. The advertising of individual businesses (such as hotels) should not be the main feature on the home page and the advertising of non-tourism businesses (e.g. cleaning services) should be avoided. The website will also need to be updated with the new brand identity once this has been completed.

Alignment with the Murray Region

EMDTA should align its marketing strategy, promotional activities and brand with that of the broader Murray Region. However, the rebranding and strategic direction for the Murray Region is yet to be communicated. It is recommended that the MRTB Brand Strategy,

scheduled to be released in 2012/13, is considered against the recommendations provided in the RSMP.

Key outcomes:

- Destination marketing by EMDTA to be undertaken strategically with a focus on changing perceptions rather than 'call to action' marketing (implemented over time)
- Region promoted under the 'hub and spoke' approach, mainly via the website and VIC, and with an enhanced focus on experiences that reflect the new positioning
- Establish partnerships and joint venture marketing with relevant networks
- Revise EMDTA Marketing Plan and consider alternative distribution channels
- Upgrade of the current website / integrate digital channels with marketing
- PR strategy developed to capitalise on new and existing opportunities
- Liaise with MRTB on opportunities to buy into regional campaigns
- Align strategy with *MRTB Brand Strategy*.

4.8.2 Event specific strategy

Events are an effective way to increase visitation in the short term. They clearly demonstrate an increase in visitation i.e. an increase in visitation due to an event is highly visible and measurable. Events can also play a key role in reinforcing the positioning and the brand of a destination. They are also an excellent way to showcase the region to new visitors. In particular they should be used to generate visitation in traditionally quieter periods.

For these reasons it is recommended that a stronger focus be placed on the use of events in destination marketing, further building and promoting the strong base of existing events in the Region.

New events should be developed, promoted and leveraged to increase visitation in the short-term. This could include obtaining hosting rights for an existing, high profile event that fits with the new positioning.

It is suggested that at least two new events be developed, or hosting rights of an existing high profile event be secured over the next three years. A focus should be placed on scheduling events during the less visited winter months. These events should be facilitated in partnership between EMDTA and the Councils. Event attraction or development must be strategic and aligned to the RSMP and its target market groups i.e. these events should leverage off the key attributes of the destination and focus on attracting the target market groups. It is recognised that financial support for new events is likely to be required during their establishment.

Existing events that support the positioning of the destination can also be expanded where appropriate and included as key visitor experiences in EMDTA's destination marketing activities. It is understood that the marketing of some existing events is currently undertaken directly by event committees. Where appropriate EMDTA should provide support for these marketing activities at both a strategic and tactical level include cross-promotional opportunities or partnership. However, this may not be appropriate in all circumstances.

Increased visitation to the Region through events will offset the expectations of industry for the need for 'call to action' destination marketing activities and provide flexibility to undertake strategic destination marketing activities instead.

It is also recommended that some 'call to action' promotion may be required to convert day-trippers to festivals and events into overnight visitors. This is of particular relevance to Regional NSW and Victorian visitors. A longer length of stay will have flow on effects for the whole Region.

Key outcomes:

- Councils and EMDTA to develop at least two new events in the next three years during the less visited winter months to increase visitation in the short-term, and showcase the region to potential visitors.
- EMDTA include the promotion of events that align with the positioning as key experiences within their destination marketing activities
- Better leverage existing events that align with the strategic direction
- Stimulate an increase in visitation in low periods
- Increase length of stay of event visitors.

4.9 Stage four - measure progress

Measuring, evaluating and reporting on the progress and effectiveness of the RSMP are vital. The RSMP must be measured on three separate levels. These are:

- Measuring the implementation of the RSMP to schedule i.e. against the Implementation Plan
- Measuring the effectiveness of specific marketing campaigns
- Measuring the impact of the overall strategy against its goals.

Each of these requirements is outlined below in greater detail.

4.9.1 *Measuring the implementation of the RSMP to schedule*

As a minimum it is recommended that the implementation of the RSMP is evaluated at the end of each year. It should be measured against the timings included in the proposed Implementation Plan as outlined in section 5. The status of each action item should be noted and recorded.

It is likely that the Implementation Plan will also need to be revised in light of variations, changing circumstances or new information.

The progress of the RSMP should also be communicated to industry to keep them engaged.

4.9.2 *Measuring the effectiveness of marketing activities*

Each major marketing campaign undertaken by EMDTA should also be evaluated against its objectives. These objectives may vary for each campaign as a suite of different marketing activities will be undertaken to implement the strategy. Examples of objectives and how they can be measured are included in the Table 4.

Table 4 Example objectives of marketing campaigns

Example of objective	Source	Measurement
Increase awareness of the destination amongst target markets	Regional Awareness and Perceptions Survey (RAPS)	Unprompted awareness of Echuca-Moama and District with 'traditional family life' and 'conventional family life' market segments
Influence target markets' perceptions of the destination according to the new positioning	RAPS	Unprompted destination associations of Echuca-Moama and District* with target market segments. Measurement could include an increase in association with any of the following categories: <ul style="list-style-type: none"> • Adventure activities • Aboriginal experiences • Family experiences • Natural attractions • Wildlife.
Increase visitation in low periods	ABS Statistics ⁴	Room occupancy rates in winter
Increase visitor database	EMDTA	Number of emails or contact details collected from potential visitors.

* Data is currently only available for the Murray Region. A custom RAPS would be required for statistics on Echuca-Moama and District. Alternately a private survey may be required.

Whilst it can be difficult to do, measuring the effectiveness of marketing campaigns will help refine the tactical marketing activities of EMDTA. In particular, activities based on changing consumer perceptions are hard to quantify and may require specialist survey and market research to determine the impacts. However, this approach is costly and may not be justifiable. Alternative options for collecting data include an online consumer research tool (e.g. Get Smart), industry data from operators such as room occupancy rates and research currently undertaken at key events in the Region.

It is also important to note that each marketing campaign is one element of the overall marketing strategy. The overall strategy needs to be evaluated as a whole. This is outlined in the following section.

4.9.3 Measuring the effectiveness of the overall strategy

The effectiveness of the overall strategy also needs to be measured and evaluated. This should be undertaken after around 2.5 years. The effectiveness of the Plan should be measured against the goals outlined in section 4.3.

The evaluation may require a survey of visitors' perceptions or behaviour if research is not available through other organisations such as MRTB, Tourism Victoria, Tourism Research Australia etc. to confirm the effectiveness of the strategy against some of its goals.

The effectiveness of the RSMP should be used to inform the subsequent strategies for the destination beyond the three-year timeframe covered by the RSMP.

However, the strategy is a 'work-in-progress' document and may need to be amended in the interim. This could be because of new information coming to light (such as market research or strategies including the MRTB Strategic Plan), significant change in circumstances or shift

⁴ ABS – Tourist Accommodation, Small Area Data 2011

in the context in which the tourism industry is operating in the region. This amendment should be championed by EMDTA with input from LTAs and industry in the process.

4.10 Stage five - product development

Whilst outside the scope of the project, product development activities must be integrated with the RSMP for it to be successful. Product and experience development across the Region are required to achieve the repositioning of the destination.

In particular there is potential to:

- increase nature-based product (including accessible 'soft' adventure water-based experiences)
- develop tourism product in surrounding National Parks (Barmah-Milewa / Gunbower/ Mathoura), including indigenous experiences
- increase day activities and trips out of Echuca-Moama in surrounding areas
- increase farm gate food and wine experiences
- improve the entrance to Echuca-Moama from the south and continue town entrance installations for regional towns that depict product strengths and characteristics
- develop more family friendly areas and experiences, including parks, picnic areas, walking tracks and cycling trails
- more interactive experiences associated with the Port of Echuca.

In the short to medium term the responsibility of product development strategy remains with the Shire of Campaspe and Murray Shire Council. This is reflected in the industry structure proposed in Stage one. However, in the long-term the responsibility for product development may shift to the RTA, EMDTA, if the phase two industry structure is implemented. This would align product development with marketing activities.

While the Councils and National Park agencies have a key role to play in product development (often in a strategic and infrastructure capacity), the private sector should be the main developer of new experiences.

The redevelopment of the Port of Echuca also provides an opportunity to reinforce the new positioning and branding of the region through marketing.

It is recommended that the Shire of Campaspe and Murray Shire Council develop a Product Development Strategy to support the RSMP. This should be undertaken with input from EMDTA, MRTB, LTAs and local industry. A budget for marketing activities of new products developed by the Council would also need to be provided to EMDTA.

Key outcome:

- Develop a Product Development Strategy
- Undertake product development to support the repositioning of the destination and enhance the visitor experience (public and private sector)
- Leverage product development in destination marketing activities

5 Implementation plan

The Implementation Plan outlines the actions required to implement the RSMP. It is assumed that EMDTA will be responsible for the implementation of the plan with support from other organisations.

Stage one – develop a platform to implement the RSMP				
Strategy	Action / outcome	Responsibility	Timeframe	Priority
1 Tourism industry restructure	<p>1.1 Tourism industry restructure</p> <p>Undertake Phase one restructure to enable successful implementation of the RSMP as outlined in Figure 21.</p> <p>Council, EMDTA, LTAs and Industry to develop a working group to achieve the desired structure (if required - considering two workshops have already been undertaken in the region).</p> <p>Key outcome is to ensure EMDTA is responsible for all destination marketing activities and providing leadership to LTAs</p> <p>LTA roles and responsibilities clearly defined</p>	EMDTA, Council, LTAs, Industry	Jan – July 2013	High
	<p>1.2 Assess the appropriateness of the Phase two industry structure</p> <p>Determine whether further amendments are required to the industry structure to align product development with destination marketing activities within EMDTA</p>	EMDTA, Council, MRTB, LTAs, Industry	2016	Medium
2 Consolidate resources	<p>2.1 Assessment of tourism-related funding</p> <p>Assessment of all tourism-related funding</p> <p>All marketing funding consolidated</p> <p>Savings from the rationalisation of other tourism-related funding identified and consolidated</p>	Council	Jan – April 2013	High

Stage one – develop a platform to implement the RSMP

Strategy	Action / outcome	Responsibility	Timeframe	Priority
	<p>2.2 Consideration of alternate revenue streams</p> <p>Assessment of alternative sources of revenue (e.g. levy on businesses). Potential revenue streams identified and quantified.</p> <p>2.3 Sufficient resources secured for the RSMP</p> <p>EMDTA to undertake assessment of resources required to implement the RSMP. Table 2 indicates that approximately \$110K will be required each year</p> <p>Sufficient resources secured for EMDTA to undertake the RSMP or alternately RSMP amended if sufficient resources are not available and high priority activities actioned only. (Note: a levy might take considerable time to implement and timelines may need to be revised)</p>	<p>Council, EMDTA</p> <p>EMDTA, Council</p>	<p>Jan – April 2013</p> <p>Jan – April 2013</p>	<p>Medium</p> <p>High</p>
3 Build Support	<p>3.1 Alignment of industry with a common strategy</p> <p>Develop an Industry and Community Communications Plan to align industry with a common strategy</p> <p>Effectively communicate the RSMP through workshops, newsletters, meetings and other communicate techniques as outlined in the Communication Plan</p> <p>3.2 Strengthen communication with industry and the community</p> <p>As per Industry and Community Communications Plan in 3.1.</p> <p>3.3 Partnerships identified</p> <p>Potential partnership opportunities identified and relationships built. Opportunities discussed and leveraged. E.g Parks Victoria</p>	<p>EMDTA</p> <p>EMDTA</p> <p>EMDTA, Council</p>	<p>Jan – Dec 2013</p> <p>Ongoing</p> <p>Jan – Dec 2013</p>	<p>High</p> <p>High</p> <p>Medium</p>

Stage two – initiate change

Strategy	Action	Responsibility	Timeframe	Priority
4 Repositioning	<p>4.1 New positioning understood by industry and community</p> <p>Communication of the new positioning strategy as per the Industry and Community Communications Plan outlined in 3.1</p>	EMDTA	Jan – Dec 2013	High
	<p>4.2 Shift in potential visitors’ perspectives of the destination as a more ‘active’ and ‘contemporary’ place to visit</p> <p>Activities commenced to shift consumer perceptions. These are outlined in greater detail in 6.1 – 6.5.</p> <p>Focus on ‘soft’ adventure experiences of the region</p> <p>Note: must be aligned to rebranding and product development activities</p>	EMDTA	April 2013 - (dependent on completion of components from stage one)	High
5 Rebranding	<p>5.1 Develop a new brand identity to reflect the new destination positioning</p> <p>Develop a new brand identity for the region that may include a logo, tagline, style criteria and hero images</p> <p>Recommended a professional agency is used to develop the brand in partnership with EMDTA</p>	EMDTA	July – Sept 2013	High
	<p>5.2 Brand identity testing</p> <p>Undertake testing with existing and potential markets with the new brand identity.</p>	EMDTA	Sept 2013	High
	<p>5.3 Brand essence and key values communicated to industry</p> <p>As per Industry and Community Communications Plan, the brand identity needs to be communicated to industry.</p> <p>EMDTA to work with industry to understand the new brand and positioning and assist industry to adapt their marketing activities and communications to reflect the brand.</p>	EMDTA	Oct – Dec 2013	High

Stage three – deliver results

Strategy	Action	Responsibility	Timeframe	Priority
6 Strategic marketing	<p>6.1 Shift to strategic marketing</p> <p>Undertake destination marketing strategically with a focus on changing perceptions rather than ‘call to action’ activities. However, this transition needs to be managed along within industry expectations. It should only commence with the completion of stage one and two of the Plan.</p>	EMDTA	Aug 2013 – Dec 2016	High
	<p>6.2 Revise Marketing Plan</p> <p>EMDTA to revise Marketing Plans for 2013 – 2015 to reflect the new positioning, branding and target markets</p> <p>Marketing Plan is communicated to industry and buy-in sought</p> <p>Consideration of alternative distribution channels in Marketing Plan that align to the target markets. This includes digital media as well as other CRM targeted activities. Strategic marketing partnerships should also be sought out.</p> <p>Develop PR Strategy to leverage off existing opportunities e.g. festivals and events</p>	EMDTA	Annually / ongoing	High
	<p>6.3 Continue to market via, and enhance, the ‘hub and spoke approach’</p> <p>Current approach will continue with increased emphasis on experiences offered outside of Echuca-Moama that align with strategic direction i.e. action plan for regional dispersal through day trips opportunities</p> <p>Update website to include greater information on experiences outside of Echuca-Moama that align to the new positioning and branding</p> <p>Develop a familiarisation program for VIC Staff that is focused on products / experiences outside of Echuca-Moama with the objective to increase the</p>	EMDTA	Immediately	High

Stage four – measure progress

Strategy	Action	Responsibility	Timeframe	Priority
8 Measure Progress	<p>8.1 Measure progress</p> <p>Complete an annual review of the implementation of the RSMP against the Implementation Plan.</p> <p>Undertake survey of visitor perceptions or behaviour where necessary to measure changes from the implementation of the Plan (including analysis of existing event surveys)</p> <p>Measure impacts of major marketing campaigns against their objectives</p> <p>Assess visitor information and insights to recommend changes to the RSMP</p>	EMDTA	Annually	High
	<p>8.2 Communicate progress</p> <p>Keep stakeholders informed with the progress and implementation of the RSMP</p>	EMDTA	Annually	High
	<p>8.3 Evaluate and revise the RSMP</p> <p>Evaluate the effectiveness of the RSMP against its goals (section 4.3).</p> <p>Revise the RSMP in 2016.</p>	EMDTA	June 2016	High

Stage five – product development

Strategy	Action	Responsibility	Timeframe	Priority
9 Product Development	<p>9.1 Develop a Product Development Strategy to support the implementation of the RSMP</p> <p>This Strategy must focus on developing visitor experiences that will enhance and support the new destination positioning and branding.</p> <p>Note: this is outside the scope of the project but is critical to the RSMP's success.</p>	Council (EMDTA with support only)	Ongoing	High
	<p>9.2 Leverage off product development that reinforces the new positioning</p> <p>Integrate product developments such as the Port of Echuca redevelopment in the marketing strategy for the region.</p>	EMDTA	Ongoing	High

6 Assessment of net benefits

This section of the report provides an overview of the outcomes and benefits of implementing the RSMP. Whilst the implementation of the RSMP will be undertaken over three years, the benefits of the Plan will extend well beyond this period. For this reason the assessment has been undertaken to show the impact five years after the implementation of the Plan.

The RSMP is largely strategic and does not identify direct tactical marketing activities. Therefore a number of assumptions have been made to estimate the impact from the proposed Plan. To account for the large number of variables the assessment has been completed for three different scenarios. These are outlined in the table below.

Scenario	Likelihood	Assumptions
Optimistic	A reasonable but optimistic forecast	<ul style="list-style-type: none">• Significant change in visitors' perceptions of the region• Seamless collaboration across the region with marketing activities• Significant product development undertaken to support the change in positioning• Well established events schedule
Base Case	Average or 'most likely' forecast	<ul style="list-style-type: none">• Noticeable change in visitors' perceptions of the region• Successful restructure within the region with strong leadership from EMDTA and support from LTAs• Some product development undertaken to support change in positioning• New events in the region gaining momentum
Conservative	A reasonable but conservative forecast	<ul style="list-style-type: none">• Some change in visitor's perceptions of the region• Restructure complete with improvement in destination marketing processes• Limited product development undertaken to support the change in positioning

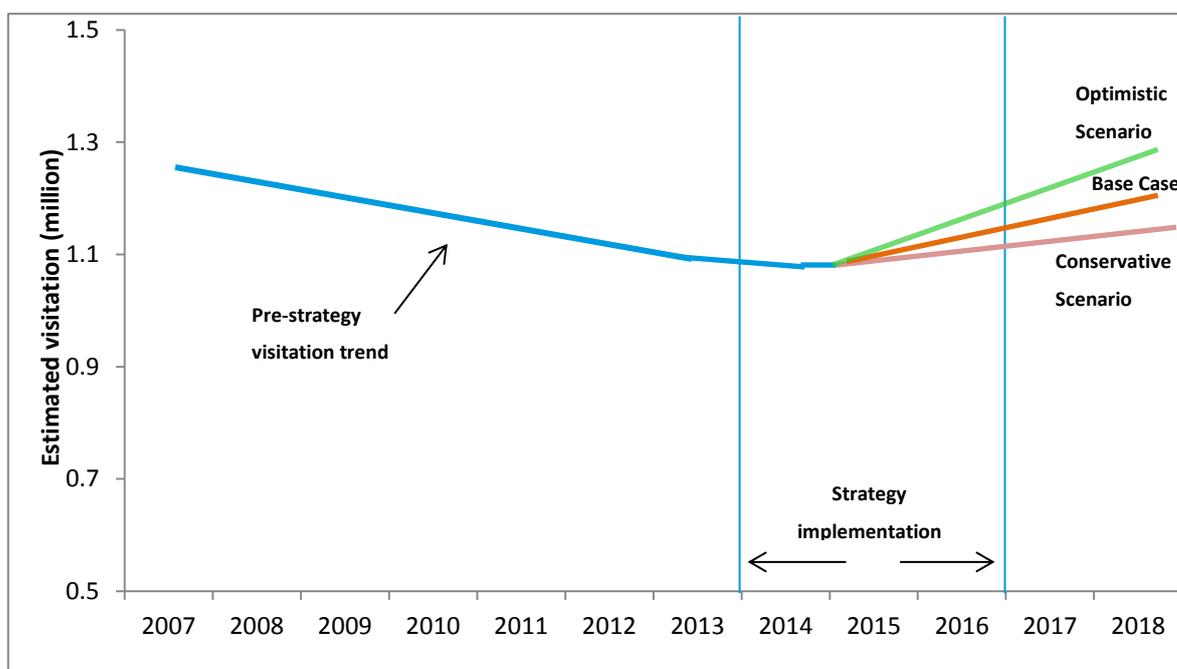
6.1 Impact on visitation

The implementation of the RSMP will have a positive impact on visitation to the region. Professional judgement and consideration of other destinations that have implemented similar marketing strategies in regional Australia have been used to forecast the increase in visitation.

For all three scenarios it is forecast that the increase in visitation to the region will be gradual in the first twelve months and will accelerate in year 2 and 3. This is because the initial stage of the Plan is focused on restructuring. The visitation forecast for each of the three scenarios is shown in Figure 24.

It shows that after twelve months the historical long-term decline in visitation will be arrested, with an increase in visitation from the second year of the Plan's implementation for all scenarios. The increase in visitation will be most pronounced with the optimistic scenario reaching 1.27 million visitors in 2018.

Figure 24 Forecast visitation with the implementation of the RSMP



Economic impacts

A number of assumptions have been used to undertake the economic assessment. These are:

- Total visitation in the region would continue to decline at a rate of 2% without the implementation of the RSMP
- Average expenditure by day visitors is \$92
- Average expenditure by overnight visitors is \$125 per day.
- Visitation to the region increased as the rate outlined Figure 24.

An example of applying these assumptions is that a 1% increase in total visitation (or an additional 11,800 visitors) would result in visitor expenditure of \$2.3 million, indirect expenditure of \$2 million and 50 jobs in the region.

Table 5 summarises the economic impacts for each of the three scenarios in relation to direct expenditure, indirect expenditure and employment.

Table 5 Forecast annual impact from the implementation of the RSMP at 2018

Scenario	Visitation	Direct Expenditure	Indirect Expenditure ⁵	Employment ⁶
Optimistic	203,000	\$39.8 million	\$36.2 million	454 FTEs
Base Case	158,000	\$30.9 million	\$28.1 million	352 FTEs
Conservative	125,000	\$24.4 million	\$22.2 million	278 FTEs

Table 4 outlines that under the Base Case an additional 158,000 tourists would visit the region in 2018 than would have otherwise been the case without the implementation of the RSMP. The impact of these additional visitors is estimated to be \$30.9 million p.a. in direct expenditure and \$28.1 million p.a. in indirect expenditure. It would also support 352 jobs across Victoria (represented by full-time equivalents or FTEs). The majority of these jobs are also expected to be within the local region.

Under the Optimistic Case the impact would be greater with a total of \$76 million in expenditure during 2018 and an additional 454 jobs supported by the implementation of the RSMP. The Conservative Case estimates that the RSMP would increase expenditure by \$46.6 million in the region and support 278 jobs.

The increase in visitor expenditure in the region is also likely to provide a stimulus for investment within the tourism sector. The RSMP indicates that product development is required to support the plan. This will be undertaken by industry and is likely to result in innovative new products that will help to define the region and sustain a competitive advantage over surrounding destinations. The repositioning of the destination may also provide a catalyst for tourism operators to adjust their own marketing activities and product offerings to align with the new destination positioning and target markets.

The RSMP will also increase the resilience of the tourism industry. Through the restructure and better alignment of marketing activities there will be more scope for EMDTA to be flexible in its approach and respond to changing circumstances. It will be more empowered to drive future strategies and ensure that the region remains competitive as a regional tourism destination in Victoria and southern NSW.

The economic impacts described in the assessment will be foregone if the RSMP is not implemented.

⁵ Indirect expenditure was calculated using a multiplier valued at 1.91. This multiplier is used by Tourism Research Australia to calculate indirect expenditure at a national level (TRA, 2010) as the multiplier for the Shire of Campaspe and Murray Shire Council is not known. However, it is likely that the multiplier of 1.91 is on the higher end of the scale as regional areas generally have lower multipliers than compared to a national level. A multiplier of 1.91 means that every dollar spent directly on tourism in the region adds an additional 91 cents to other parts of the economy.

⁶ The calculation for employment impacts has been made on the assumption that every \$1 million of direct tourism expenditure supports 11.4 jobs within an economy (TRA, 2010). Employment is shown as full-time equivalents (FTEs).

6.2 Social impacts

The implementation of the RSMP will also have social impacts on the community. However, not all of these impacts may be desirable. Whilst increased visitor numbers may provide a positive outlook for some businesses and individuals, it may also provide an inconvenience or disruption for others. For example residents may have difficulty parking or accessing the town during peak tourist periods or events due to the increase in visitation.

A summary of possible social impacts from the implementation of the RSMP are outlined in the table below.

Potential positive impacts	Potenital negative impacts
More interesting things to do within the region	Negative impact on local character
Improved facility maintenance	Increase price of goods and services
Increase profile of the region	Lack of access for residents
Increased local pride	Impact of environment (litter etc.)

It is difficult to predict the social impact on the community from the implementation of the Plan. However, given the forecast increase in visitation due to the RSMP is relatively small (<20% of current visitation) the social impacts are not expected to be significant.

Potentially negative social impacts from the implementation of the RSMP can also be mitigated through planning and policy.

Appendix

Key organisations

State Tourism Organisations (STOs)

Echuca-Moama and District is located in both NSW and Victoria. As such both Destination NSW and Tourism Victoria support the destination. However, the Region is more closely associated with Victoria, given that 83.3% of its visitors come from Victoria (Data Insights, 2011).

Tourism Victoria's *Regional Tourism Action Plan 2009-2012* outlines the key strategies undertaken by Tourism Victoria to accelerate the development of tourism in regional areas. The key strategies outlined in the Report are to:

- Improve regional industry structures
- Improve the supply and quality of tourism experiences
- Increase consumer demand for regional tourism experiences
- Address skills, service standards and environmental sustainability

Shire Councils

The Shire of Campaspe and Murray Shire Council have historically worked together in partnership to attract and support visitation to the Region. Both Councils provide funding to EMDTA for visitor servicing and destination marketing. Murray Shire also has a direct role in the management of the Mathoura Visitor Information Centre. Shire of Campaspe also provides funding for the operation and marketing of the Echuca Portside Traders, Golden Cow and Kyabram Fauna Park. The Shire of Campaspe also operates the Port of Echuca and Echuca Paddlesteamers.

The other roles the Councils undertake within the tourism industry include:

- Industry development
- Product development
- Policy and planning
- Advocacy

Regional Tourism Boards

The Murray Regional Tourism Board is operational within the Region. It superseded the Murray Campaign Committee that was previously responsible for coordinating the regional marketing of the Murray.

The Murray Regional Tourism Board was formed in 2009. The role of a RTB is defined by Tourism Victoria as:

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.

However, it is the perception of many local stakeholders that the MRTB is yet to reach its full potential as a regional tourism board. Many believe this is due to the short period of time the

Board has been in operation. They commented that the MRTB has been limited to only undertaking regional marketing activities and has not been operating to the full extent of its charter to-date.

However, the MRTB is currently implementing a number of programs including developing a brand strategy and has recently undertaken an extensive product audit to guide their product development focus for the wider region. It is envisaged that the MRTB will play a greater leadership role in the Region overtime.

Regional Tourism Associations (RTA)

Echuca-Moama and District Tourism Association (EMDTA) has been in operation since 1998 and is seen as the only RTA in the Region. It is a member-based organisation with over 340 local businesses as members. EMDTA also receives funding from Shire of Campaspe and Murray Shire Council to manage the Visitor Information Centre in Echuca and to undertake destination marketing activities on behalf of the Region.

Tourism Victoria defines the role of RTAs as:

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.

EDMTA differs from this definition historically in that it works in partnership with local Government to deliver the defined RTA services.

EDMTA does not undertake product or industry development like many other RTAs. EMDTA is primarily responsible for destination marketing in the region, however, in recent years some Local Tourism Associations have undertaken destination marketing activities in partnership or independently to EMDTA. It is acknowledged by some stakeholders that this is due to the limited resources EMDTA has had for marketing activities.

In 2011 EMDTA received additional funding from industry to improve their financial position. It is the perception of many of the stakeholders that additional resources are required for EMDTA to operate effectively as a RTA.

EMDTA represents the Echuca-Moama sub-region in bi-monthly meetings with other sub-regions in the Murray to discuss product, marketing and industry development activities.

Local Tourism Associations (LTAs)

There are several LTAs active in the Campaspe-Murray Region. However, the roles and responsibilities of many of the LTAs are not well defined. The exact number of LTAs in the region depends on the definition used as well as the timeframe considered as the roles of many of the local organisations have changed overtime.

Tourism Victoria defines LTAs as:

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.

Under this definition the following organisations are considered LTAs.

- Echuca-Moama Attractions Association
- Echuca-Moama Accommodation Association
- Various event committees
- Echuca Portside Traders

The roles and activities of each of these organisations are outlined in table 6. Visitor servicing refers to servicing of visitor needs.

The Rushworth Tourism Association has been active as a LTA in the past, however, it has not been included in the assessment as is not currently functioning as an LTA.

Organisation	Destination marketing	Industry Representation	Familiarisation tours	Visitor servicing	Industry networking	Product development	Industry development
Attractions Association		★	★★	★★★	★	★	★
Accommodation Association	★★	★★★	★★	★★★	★	-	★
Event committees (various)	-	-	-	★★★	-	★★	-
Echuca Portside Traders	-	★	★★	★★★	★		★

★★★ = always ★★= sometimes ★ = rarely

Table 6 Roles and activities undertaken by LTAs in the Region

Other Local Associations

There are many other local associations that have an interest in the tourism industry in the Region. The majority of these organisations have a broad focus on economic development i.e. their scope extends beyond only tourism. The funding structures of these organisations vary from being purely member-based to being supported by Council or private enterprise.

A sample of other local associations and their roles and activities undertaken are outlined in Table 8.

Organisation	Destination marketing	Industry Representation	Familiarisation tours	Visitor servicing	Industry networking	Product development	Industry development
Echuca-Moama Business and Trades	-	★★	-	-	★★	-	-
Girgarre Development Committee	-	★★★	-	★	★★	★★	★
Committee for Echuca-Moama	-	★	-	-	★	-	★
Gunbower District Development Group	★	★★★	★	★	★★	★★	★
Kyabram Chamber of Commerce	-	★★★	-	★	★★	★	★
Rochester Chamber of Commerce	-	★★★	-	-	★	★	-
Mathoura Chamber of Commerce	-	★★★	-	-	★	★	-
Combined Clubs of Moama	★	★★★	-	-	-	★	-

★★★ = always ★★= sometimes ★ = rarely

Table 7 Roles and activities undertaken by other local associations

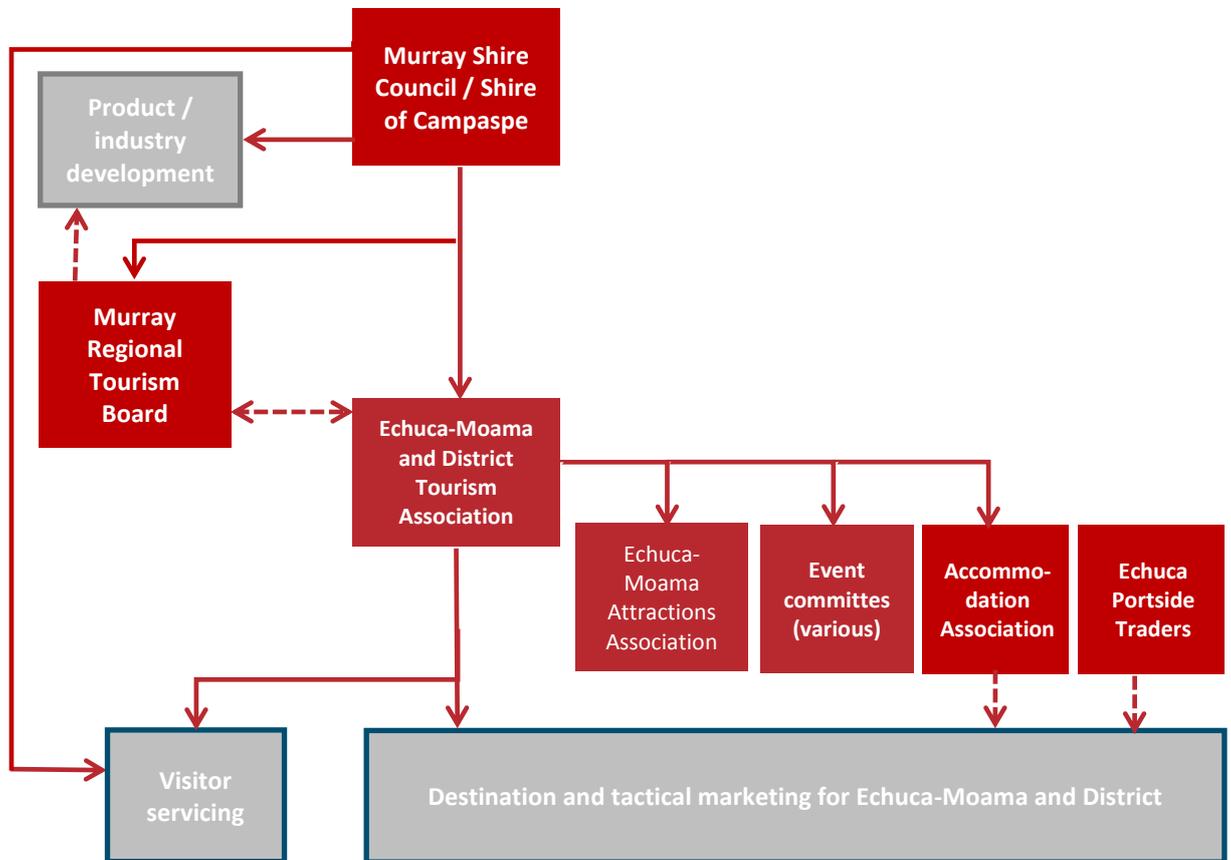
6.2.1 Tourism structure

There is not unanimous agreement across the region on what the Region's tourism structure looks like. The undefined roles and activities of many organisations in the Region make it difficult to determine the structure.

However, one issue that is clear is that the structure is not well defined and understood across the region. This was reflected during consultation with LTAs and industry.

An outline of the tourism structure in the region is illustrated in Figure 25. It is based on the process 'actually' occurring in the region rather than what process is 'meant' to occur.

Figure 25 Tourism structure in Echuca-Moama and District



--> Infrequent / partial relationship

6.3 SWOT

A SWOT analysis presents the strengths and weaknesses of the destination compared to competitors as well as the opportunities and threats it faces. The SWOT analysis for Echuca-Moama and District is outlined below. A more detailed assessment of the product strengths of the region is also provided in section 2.

Strengths	Weaknesses
Closest point on the Murray to Melbourne	Limited resources for destination marketing
Climate of the region	Lack of alignment of strategic activities and destination marketing i.e. no uniform brand
Murray River and water-based activities	Lack of leadership in crisis management
Other natural landscapes e.g. NPs	Lack of clarity across the region on roles and responsibilities of organisations
Strong events portfolio	Limited opening hours outside of Echuca-Moama
Heritage and history attractions	Congestion during peak periods
Food and wine	Perceptions of a 'tired' brand
Strong brand awareness	Entry to Echuca from the south is unappealing
Touring routes e.g. Long Paddock	Limited new product
Range of accommodation (middle-lower)	Lack of walking or biking tracks and picnic areas within Echuca-Moama
Engaged local industry	
Opportunities	Threats
Port of Echuca refurbishment	Access to water security
Melbourne is growing to the north	Duplication / no alignment of associations
Event participation by key target markets groups is strong	Cross-border issues
Demand for nature-based tourism products in the region	Financial circumstances decreasing yield (visitor spend)
Indigenous Cultural Centre in Dharnya and participation in tour	Increase in large franchises within the town
Demand for a riverside public area	Visitors willing to travel less for a short break
	Lack of unity between Echuca-Moama and the broader regional areas

Table 8 SWOT analysis for Echuca Moama and District

6.4 Activities of visitors to the Murray

Figure 26 Activities of overnight visitors 2009-2011 (MRTB 2012b)

OVERNIGHT VISITOR ACTIVITIES BY REGION 2009-2011	Western Region	Mid West Region	Central Region	Mid East Region	Eastern Region	Total Murray
East out at restaurants	70%	65%	65%	62%	71%	65%
General Sightseeing	60%	49%	46%	41%	49%	46%
Pubs clubs discos	28%	34%	39%	39%	30%	35%
Go shopping	41%	30%	34%	29%	38%	34%
Visit friends and relatives	35%	31%	26%	24%	41%	29%
Go fishing	13%	26%	13%	19%	6%	15%
Visit history heritage sites	23%	22%	14%	7%	24%	15%
Bushwalking or rainforests walks	19%	22%	13%	14%	9%	14%
Visit national parks and state parks	22%	16%	9%	13%	12%	12%
Visit museums	22%	17%	11%	6%	19%	12%
Go on a daytrip	15%	11%	9%	14%	17%	12%
Water activities or sports	11%	9%	13%	11%	3%	11%
Picnics or BBQs	12%	9%	11%	11%	8%	10%
Play golf	8%	11%	7%	17%	3%	9%
Charter boat cruise or ferry ride	13%	9%	14%	6%	5%	9%

KEY:

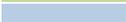
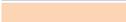
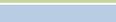
higher than Murray average	
equal to Murray average	
lower than Murray average	

Figure 27 Activities of day trip visitors 2009-11 (MRTB, 2012b)

DAY TRIP VISITOR ACTIVITIES 2009-2011	Western Region	Mid West Region	Central Region	Mid East Region	Eastern Region	Total Murray
Go shopping (pleasure)	37%	28%	27%	20%	56%	37%
Attend an organized sporting event	11%	19%	6%	40%	90%	9%
General Sightseeing	16%	26%	39%	30%	10%	24%
Charter Boat cruise or ferry ride	0%	0%	9%	0%	0%	3%
Picnics or BBQs	12%	20%	4%	14%	20%	5%
Pubs and clubs	10%	70%	15%	14%	70%	10%
Play other sports	40%	11%	9%	30%	40%	6%
Water activities/sports	0%	0%	7%	60%	0%	3%
Attend movies/cinemas	0%	0%	7%	0%	30%	3%
Go fishing	70%	0%	8%	90%	10%	4%
Eat out at restaurants	57%	56%	49%	44%	46%	49%
Visit friends and relatives	10%	50%	10%	15%	11%	11%

KEY:

higher than Murray average	
equal to Murray average	
lower than Murray average	

6.5 Roy Morgan Values Segments

Figure 28 Roy Morgan Values segments

Market segment	Characteristics / generalisations	Market segment	Characteristics / generalisations
Traditional family life	<p>50+ age profile</p> <p>Retired / semi-retired</p> <p>Motivated by security, reliability and providing better opportunities for their family.</p> <p>Generally empty-nesters.</p> <p>Focus on re-building relationships and family.</p> <p>Do not like change, with old and familiar environments important.</p>	Conventional family life	<p>Late 30s to mid 40s</p> <p>Often referred to as "middle Australia", with values centred around the significant events in their personal and family lives.</p> <p>Seek greater financial security.</p> <p>Generally seek value for money / often price conscious.</p> <p>Conservative in decision-making.</p> <p>Influenced by how they 'feel' about a product or destination.</p>
Socially aware	<p>35- 49 age group</p> <p>Well educated</p> <p>High disposable incomes</p> <p>Community minded and socially active.</p> <p>Always searching for something new and different and new things to learn.</p> <p>Attracted to things that are new or innovative – are the first to take up new products or services.</p> <p>Not overly price conscious.</p> <p>High outbound travellers</p>	Visible achievers	<p>40s age profile</p> <p>Visible Achievement refers to people who are visible success stories.</p> <p>Despite being successful they retain traditional values about home, work and society.</p> <p>The family is very important to this segment and place great emphasis on providing their families with a high quality environment.</p> <p>Whilst they can afford to buy the best of everything, they look for quality and value for money, not necessarily something that is expensive.</p> <p>Always looking for a deal.</p>

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Glossary

EMDTA	Echuca-Moama and District Tourism Association
LTA	Local Tourism Association
MCC	Murray Campaign Committee
MRTB	Murray Regional Tourism Board
RSMP	Regional Strategic Marketing Plan
RTA	Regional Tourism Association
RTB	Regional Tourism Board
USP	Unique selling proposition i.e. characteristic of a destination that differentiates it from its competitors. It can be a real or perceived characteristic and is often a critical component of a promotional theme around which an advertising campaign is based.
VIC	Visitor Information Centre

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