

SNOWY VALLEYS DESTINATION MANAGEMENT PLAN

JUNE 2018

SNOWY VALLEYS COUNCIL

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

www.urbanenterprise.com.au

AUTHORS

Danielle Cousens

Eva Abbinga

Mike Ruzzene

Urban Enterprise

Urban Planning, Land Economics, Tourism Planning & Industry Software

389 St Georges Rd, Fitzroy North, VIC 3068

(03) 9482 3888

www.urbanenterprise.com.au

© Copyright, Urban Enterprise Pty Ltd, 2017

This work is copyright. Apart from any uses permitted under Copyright Act 1963, no part may be reproduced without written permission of Urban Enterprise Pty Ltd.

FILENAME: Snowy Valleys DMP Draft Report_20032018

VERSION: 1

DISCLAIMER

Neither Urban Enterprise Pty. Ltd. nor any member or employee of Urban Enterprise Pty. Ltd. takes responsibility in any way whatsoever to any person or organisation (other than that for which this report has been prepared) in respect of the information set out in this report, including any errors or omissions therein. In the course of our preparation of this report, projections have been prepared on the basis of assumptions and methodology which have been described in the report. It is possible that some of the assumptions underlying the projections may change. Nevertheless, the professional judgement of the members and employees of Urban Enterprise Pty. Ltd. have been applied in making these assumptions, such that they constitute an understandable basis for estimates and projections. Beyond this, to the extent that the assumptions do not materialise, the estimates and projections of achievable results may vary.

CONTENTS

EXECUTIVE SUMMARY	1		
1. INTRODUCTION	4		
1.1. BACKGROUND	4		
1.2. PROJECT OBJECTIVES	4		
1.3. PROJECT APPROACH	5		
1.4. LOCATIONAL CONTEXT	6		
PART A. BACKGROUND	8		
2. SNOWY VALLEYS VISITOR ECONOMY	9		
2.1. INTRODUCTION	9		
2.2. KEY FINDINGS	9		
2.3. SNOWY VALLEYS VISITATION TRENDS	10		
2.4. SUBREGIONAL VISITATION	11		
2.5. SHARE OF VISITATION	13		
2.6. VISITOR DEMOGRAPHICS	14		
2.7. VISITOR PROJECTIONS	18		
2.8. ECONOMIC PROFILE	20		
2.9. COMMUNITY PROFILE	22		
2.10. MARKET PROFILE	23		
3. STRATEGIC CONTEXT	26		
3.3. FEDERAL TOURISM POLICY	26		
4. VISITOR EXPERIENCE AND PRODUCT PROFILE	37		
4.1. INTRODUCTION	37		
4.2. KEY FINDINGS	37		
4.3. REGIONAL CONTEXT	38		
4.4. RIVERINA MURRAY PRODUCT STRENGTHS		39	
4.5. SNOWY VALLEYS		40	
5. GOVERNANCE AND RESOURCES	50		
5.1. INTRODUCTION	50		
5.2. KEY FINDINGS	50		
5.3. OVERVIEW OF TOURISM SERVICE DELIVERY	51		
5.4. VISITOR INFORMATION SERVICES	53		
5.5. TOURISM EVENTS	53		
6. SWOT ANALYSIS	55		
PART B. STRATEGIC PLAN	59		
7. STRATEGIC FRAMEWORK	60		
7.1. INTRODUCTION	60		
7.2. VISION 2022	60		
7.3. STRATEGIC THEMES	61		
8. THEME 1: NATURE-BASED TOURISM	63		
8.1. OVERVIEW	63		
8.2. NATURE-BASED GAME CHANGER PROJECTS	63		
8.3. NATURE BASED TOURISM PROJECTS	64		
9. THEME 2: CYCLING	66		
9.1. OVERVIEW	66		
9.2. CYCLING GAME CHANGER PROJECTS	66		
9.3. CYCLING PROJECTS	67		
10. THEME 3: FOOD AND AGRITOURISM	69		
10.1. OVERVIEW	69		

10.2. GAME CHANGER PROJECTS	69
10.3. FOOD AND AGRITOURISM PROJECTS	70
11. THEME 4: HERITAGE AND CULTURE	72
11.1. OVERVIEW	72
11.2. HERITAGE AND CULTURE GAME CHANGER PROJECTS	72
11.3. HERITAGE AND CULTURE PROJECTS	73
12. THEME 5: ASSETS, INFRASTRUCTURE AND ACCOMMODATION	75
12.1. OVERVIEW	75
12.2. GAME CHANGER PROJECTS	75
12.3. ASSETS, INFRASTRUCTURE AND ACCOMMODATION PROJECTS	76
13. THEME 6: STRATEGIC POSITIONING, LINKAGES AND TOURISM GOVERNANCE	79
13.1. INTRODUCTION	79
13.2. RESOURCES	79
13.3. DIGITAL SERVICE DELIVERY	79
13.4. DESTINATION MARKETING AND BRANDS	80
13.5. PRODUCT DEVELOPMENT AND INVESTMENT	80
13.6. INDUSTRY DEVELOPMENT	80
13.7. EVENT PROCUREMENT	80
13.8. PARTNERSHIPS AND COLLABORATION	81
13.9. TOURISM DELIVERY AND OPERATIONAL PROJECTS	82
14. IMPLEMENTATION PLAN	84
APPENDICES	97
APPENDIX A TOURISM INDUSTRY CATEGORISATION	97

FIGURES	
FIGURE 1 SA2 REGIONS OF SNOWY VALLEYS COUNCIL	5
FIGURE 2 LOCATION CONTEXT	6
FIGURE 3 RIVERINA MURRAY SUBREGIONS	7
FIGURE 4 SNOWY VALLEYS VISITATION 2008-2017	10
FIGURE 5 COMPARISON OF VISITOR MARKETS BY PROPORTION	10
FIGURE 6 SUBREGION VISITOR MARKET BY PROPORTION	11
FIGURE 7 DAYTRIP VISITATION BY SUBREGION	12
FIGURE 8 OVERNIGHT VISITATION BY SUBREGION	12
FIGURE 9 SHARE OF VISITATION BY RIVERINA MURRAY SUBREGION	13
FIGURE 10 RIVERINA MURRAY DOMESTIC VISITOR NIGHTS PROJECTIONS	19
FIGURE 11 2015 EMPLOYMENT IN TUMUT BY PROPORTION	21
FIGURE 12 NEW DESTINATION NETWORK ALLIANCE – RIVERINA MURRAY REGION	38
FIGURE 13 NATIONALLY SIGNIFICANT LANDSCAPES WITHIN AUSTRALIA	41
FIGURE 14 PERCEPTION OF ACCOMMODATION SUPPLY BY TYPE	48
FIGURE 15 PRODUCT STRENGTHS OF SNOWY VALLEYS TOWNSHIP REGIONS	49
FIGURE 16 GREATEST BENEFIT TOURISM EXPERIENCES (1=GREATEST BENEFIT)	49
FIGURE 17 SNOWY VALLEYS TOURISM UNIT STRUCTURE	52
FIGURE 18 STRATEGIC DEVELOPMENT FRAMEWORK	60

TABLES	
TABLE 1 SNOWY VALLEYS DOMESTIC DAYTRIP, DOMESTIC OVERNIGHT AND INTERNATIONAL VISITOR DEMOGRAPHIC KEY INDICATORS	16
TABLE 2 DOMESTIC VISITOR NIGHTS IN REGIONAL NSW BY PURPOSE OF VISIT- FORECASTS 2016/17 – 2026/27	18
TABLE 3 INTERNATIONAL VISITOR NIGHTS IN REGIONAL NSW BY PURPOSE OF VISIT FORECASTS 2014/15 – 2024/25	18
TABLE 4 SNOWY VALLEYS JOBS BY INDUSTRY SECTOR	20

TABLE 5 % OF SNOWY VALLEYS JOBS WITHIN TOURISM INDUSTRY SECTORS	21
TABLE 6 EXPERIENCE STRENGTHS	39
TABLE 7 SNOWY VALLEYS WINERY FACILITIES	43
TABLE 8 ACCOMMODATION PROVIDERS (AND BEDSPACES) BY KEY TOWNSHIPS AND SURROUNDS	46
TABLE 9 AIRBNB PROPERTY CHARACTERISTICS BY TOWNSHIP	48
TABLE 10 TOTAL TOURISM EXPENDITURE	52
TABLE 11 TOURISM EXPENDITURE BY REGION, 2016/2017	53
TABLE 12 IDENTIFIED STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS FOR THE SNOWY VALLEYS TOURISM INDUSTRY	55

ACRONYMS

- ABS** – Australian Bureau of Statistics
DMP – Destination Management Plan
DRM – Destination Riverina Murray
IVS – International Visitor Survey
MTB – Mountain Bike
NBT – Nature-based Tourism
NVS – National Visitor Survey
TRA – Tourism Research Australia
TSM – Tourism Snowy Mountains
VFR – Visiting Friends and Relatives

GLOSSARY OF TERMS

Domestic day trip visitors: Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

Domestic overnight visitors: People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

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

EXECUTIVE SUMMARY

BACKGROUND

PROJECT OVERVIEW

Snowy Valleys Council commissioned Urban Enterprise to undertake the Snowy Valleys Destination Management Plan, following the merger of Tumut and Tumbarumba Councils in May 2016 to establish clear directions for destination development for the entire Snowy Valleys Council area, and outline the roles and structure governing tourism in the locality, clearly articulating Council's vision for the future.

VISITOR PROFILE AND ECONOMY

Snowy Valleys received over 422,300 visitors in the 2016/17 financial year, capturing a higher proportion of overnight visitors (47%) than the Riverina Murray region and the regional NSW average.

The Tumut subregion attracts significantly higher visitation than the Tumbarumba subregion, however visitor markets are quite different, with Tumut attracting a higher proportion of daytrip visitors (61%), than Tumbarumba, and the Snowy Valleys average. Visitor projections for the Riverina Murray region are strong, and Snowy Valleys currently attracts 8% of the Riverina Murray's total visitation.

The region attracts a significant proportion of holiday visitors, accounting for 62% of all daytrip visitors, 58% of overnight visitors and 52% of international visitors.

Visitor activity data highlights a low proportion of visitors who are eating out when compared to the Regional NSW and conversely a much larger proportion who are experiencing nature-based tourism activities.

This highlights the strength of the region in nature-based tourism but also highlights the need for Snowy Valleys to deliver an improved food and beverage experience, which can leverage from the region's local produce strengths.

A large proportion of visitation to Snowy Valleys is generated by regional NSW and in particular, visitation from Albury and Wagga Wagga. However, Canberra which is also in close proximity, currently has a low level of visitation to the region. Initiatives such as sealing, and safety improvements of Brindabella Road could have a large impact in attracting the Canberra market.

PRODUCT PROFILE

The diversity of the natural environment and nature experiences on offer in the Snowy Valleys is currently the primary driver of visitation to the region. However, to date, development of supporting infrastructure and products has been limited and could support further enhancement of adventure, sport and recreation product.

Further development and coordination of supporting complementary products across both food and agritourism will enhance the appeal of the Snowy Valleys as a touring and nature-based destination.

Product development related to the existing heritage and historical assets in the region is currently limited with significant opportunities existing for projects which can enhance the visitor experience in the region. Potentially these could include development of educational experiences which provide contemporary interpretation of current assets, food and beverage experiences which leverage from the produce history of the region, and unique products such as the Hume and Hovell Track which combine nature and adventure tourism with the history of the region.

Improved infrastructure, branding and promotion of the Snowy Valleys as a touring region is a key opportunity to attract visitors to the region.

The lack of contemporary and motivating product is key issue facing the accommodation sector in Snowy Valleys, with both an undersupply of

accommodation types such as luxury hotels / resorts, and dated, off-trend existing accommodation establishments.

STRATEGIC CONTEXT

There is strong strategic support from both Federal and State policy to grow tourism in regional NSW. This is to be achieved through a change in mindset and improved services, private sector investment, tourism infrastructure and marketing. A more robust industry is to be achieved through a more diverse and skilled workforce and improved management.

There is both Federal and State focus on developing the Asian tourism market through improved experiences for Asian visitors. There is also both Federal and State policy that supports the development of authentic Aboriginal tourism opportunities.

Regionally, the new alliance with Destination Riverina Murray provides a significant directional shift in regional branding for Snowy Valleys Council, with a move away from a primarily snow-based product, to a focus on a wider range of nature-based tourism, touring, rivers and waterways and food and agritourism.

At a local level, an extensive body of prior studies have been undertaken for the former Tumut and Tumbarumba Shires, however these highlight the need for clear actionable directions for the amalgamated Snowy Valleys region in order for it to reach its tourism potential afforded by its extensive natural and historical assets.

GOVERNANCE AND TOURISM RESOURCES

The Snowy Valleys Strategy and Place Unit has a total of 10 full time, and 5 part time (4 staff fulfilling 2 full time positions, and one 0.6 FTE role). Within this unit are the following staff resources dedicated to tourism:

- Coordinator Tourism and Economic Development (1FTE);
- Tourism Promotions Officer (1FTE);
- Tourism and Marketing Officer (1FTE-Vacant); and
- VIC Assistants (1FTE).

The overall tourism budget is estimated at \$674,700. Of importance to note is the very low allowance dedicated to marketing – around \$56,100, compared to \$348,900 dedicated to Visitor Information Centres.

Many other Councils across Australia have similar legacies with disproportionate expenditure on Visitor Information Centres.

Moving forward Snowy Valleys Council should focus further on areas which will attract visitation, this includes:

- A greater focus on digital marketing and social media – A dedicated resource in this area could also be used to support information services content; and
- Greater focus on industry development and product development – including advocacy for investment and promotion of investment opportunities.

STRATEGIC CONSIDERATIONS FOR SNOWY VALLEYS

Key strategic considerations for the Snowy Valleys Destination Management Plan include:

- Capitalising on iconic natural assets through creating signature attractions and investing in infrastructure to support recreational use;
- Leveraging from Snowy Valleys emerging strength in cycling;
- Developing experiences and products that will drive visitation to the region including food and agritourism, heritage and motivating accommodation;
- Driving large scale infrastructure and regional positioning projects that will capitalise on key target market opportunities for the region;
- Investing in key townships to support both the visitor economy and the local community; and
- Creating a unified organisational direction and achieving clear benefits from Council's investment in tourism.

STRATEGIC DIRECTION

STRATEGIC TOURISM DEVELOPMENT THEMES

Key strategic development themes for Snowy Valleys Council are provided below, which address the overarching issues and opportunities for tourism development.

1. Leveraging from iconic nature assets;
2. Creating a premier cycling destination;
3. Showcasing regional produce through contemporary food and agritourism experiences;
4. Interpretation and development of existing heritage and cultural assets and narratives;
5. Revitalising assets, infrastructure and accommodation; and
6. Maximising strategic positioning, linkages and tourism governance.

GAME CHANGER PROJECTS

The following are identified as key projects priorities for Snowy Valleys Council. They include a mix of public and private sector investments.

These projects will deliver new large scale investment in the region that will have a profound impact on tourism and the way the region is perceived in the market place.

Further detail is included in the body of the strategy.

- Brindabella Road Upgrade and Development of New Touring Route (Canberra);
- Snowy Valleys Way Touring Route Repositioning and Promotion;
- Hume and Hovell MTB Track and Adventure Trail;
- Rail trail investment including:
 - Tumbarumba to Rosewood Pilot Rail Trail (Ongoing);
 - Tumut to Batlow Rail Trail;
 - Tumbarumba to Batlow Rail Trail Link;

- Rosewood to Ladysmith Rail Trail; and
- Rail Trail Enhancements.
- Tumut River Brewery Destination Development
- Cidery Experience, Batlow;
- Blowering Dam Destination Accommodation and Café;
- Sugar Pine Walk and Pilot Hill Arboretum Masterplan and Visitor Experience Improvement;
- Mountain Ash Treetop Walk, Tumbarumba;
- Landers Falls Sky Walk;
- Tourist and Caravan Park Improvements;
- Tumut Township Streetscape and Riverfront Activation;
- Tumut Indigenous Attraction;
- Snowy Hydro 2.0 Educational Experience; and
- Indigenous Tourism Feasibility Study

TOURISM DELIVERY AND OPERATIONAL PROJECTS

In addition to development of compelling product and infrastructure a range of initiatives are required to improve tourism operations and delivery. These include:

- Reallocation of Staff Resourcing;
- Brand Development;
- Digital and Social Media Marketing Strategy;
- External Marketing Programs;
- Investment Business Case;
- Targeted Investment Attraction; and
- Events Policy and Funding.

Visitor Information Centres and services delivery is covered in a separate report.

1. INTRODUCTION

1.1. BACKGROUND

Snowy Valleys Council commissioned Urban Enterprise to undertake the Snowy Valleys Destination Management Plan, following the merger of Tumut and Tumbarumba Councils in May 2016, to consolidate their existing tourism plans (Tumut Shire Destination Management Plan and Tumbarumba Tourism Strategy) and to undertake a full review of their current Visitor Services.

The DMP (and associated Visitor Service Strategy) establishes clear directions for destination development for the entire Snowy Valleys Council area, and outlines the roles and structures governing tourism in the locality, clearly articulating Council's vision for the future.

The DMP has been prepared in close consultation with the local tourism industry and stakeholder groups, and includes a strategic context review, visitor profile; visitor economy profile; review of the existing tourism and visitor economy product in Snowy Valleys and its key identified townships; governance structure, and marketing activity and segmentation in order to develop a Plan for the Snowy Valleys.

1.2. PROJECT OBJECTIVES

The primary objectives to be achieved through development of the Snowy Valleys Destination Management Plan are:

- Provide direction on Snowy Valleys Council's vision for marketing and tourism;
- Define the value of the visitor economy to Snowy Valleys Council;
- Define council's role in the supply of visitor related infrastructure and amenities including tourism attractions;
- Identify opportunities to develop product;
- Identify opportunities to further develop information services with both traditional and new media;

- Identify improvements to local transport and signage;
- Clarify the role that the existing regional visitor brands (Tumut Region and Tumbarumba Region) will play in the future; and
- Guide the development of marketing activities such as experiential campaigns and visitor focused brand management.

1.2.1. UNDERSTANDING BEST PRACTISE

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

The Destination Management Plan (DMP) for the Snowy Valleys will follow the Guide to Best Practice in Destination Management, as developed by the Australian Regional Tourism Network (ARTN). It will draw on a wide range of primary research, policy analysis and consultation in order to understand the priorities for tourism development in the Snowy Valleys and ensure it is tailored to the needs of the region.

1.3. PROJECT APPROACH

1.3.1. SUBREGIONAL AND TOWNSHIP APPROACH

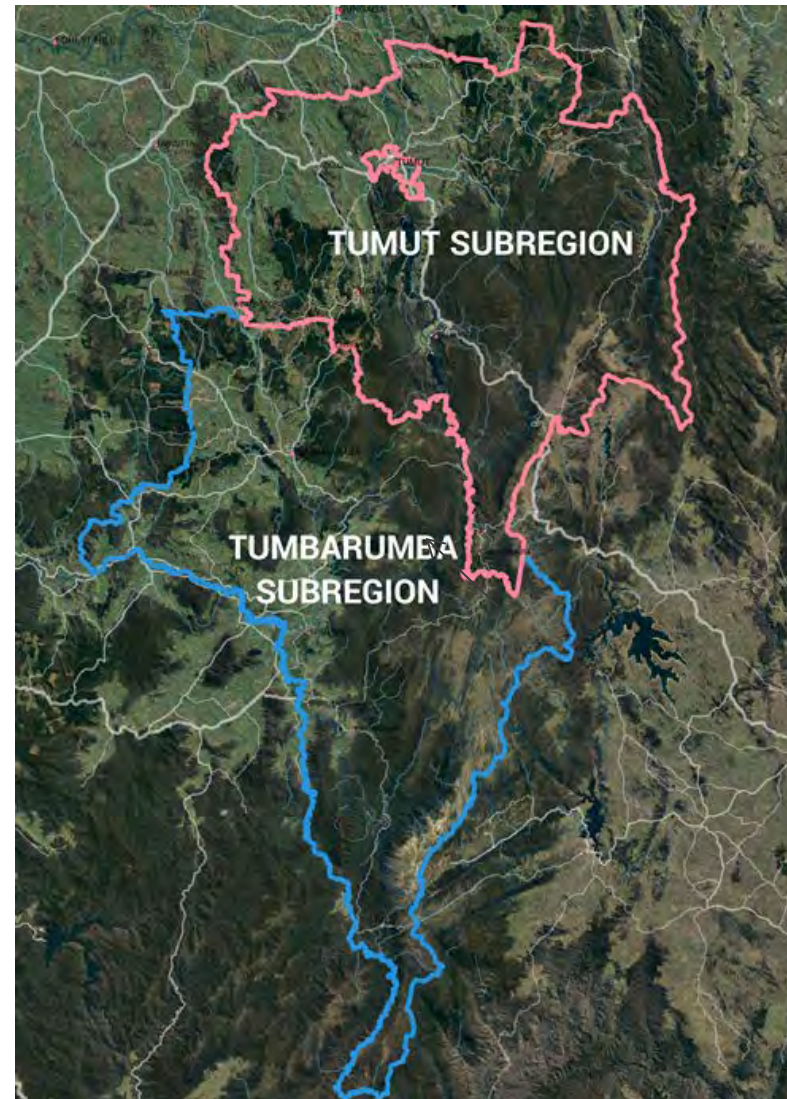
Snowy Valleys Council is comprised of the formerly separate Tumbarumba and Tumut Councils with each currently considered a distinct subregion. Moving forward, it will be imperative for these subregions to work in collaboration to leverage from the region's existing strengths, and unique attributes at a township level in order to develop a stronger visitor product to drive visitation to the region.

An assessment of visitation at the Tumut and Tumbarumba subregion level (aligning with existing TRA data (Figure 1)) was conducted in order to identify similarities, and key weaknesses, to be rectified through applying a region-wide approach.

The SA2s included within each TRA data subregion are:

- Tumut subregion – Tumut SA2 and Tumut Region SA2 (which also includes a small area of Snowy Monaro Regional and of Yass Valley LGAs); and
- Tumbarumba subregion – Tumbarumba SA2 (which also includes two small areas of Greater Hume Shire).

FIGURE 1 SA2 REGIONS OF SNOWY VALLEYS COUNCIL



Source: Urban Enterprise, 2018

1.4. LOCATIONAL CONTEXT

Tumut, the largest town in the Snowy Valleys region and the industry hub, is located just under 4.5 hours or 412 kilometres from Sydney, and 2.25 hours or 196 kilometres from Canberra. The township is 3.5 hours from the visitor market(s) of Wollongong and under 1.5 hours from Wagga Wagga.

The township of Tumbarumba in the southern part of the region is just under 5 hours or 461 kilometres from Melbourne; 1.5 hours, or 136 kilometres from Albury Wodonga; and 113 kilometres, or 1.25 hours from Wagga Wagga.

The township of Adelong is an easily accessible 20 minutes' drive from the Hume Highway, which connects Melbourne and Sydney via Albury Wodonga (with Tumut approximately a further 15 minutes' drive from Adelong).

The Snowy Mountains highway, a major touring route, and the Alpine Way both traverse the region.

Snowy Valleys Council is located in the Riverina Murray region, forming one of six subregions (Figure 3).

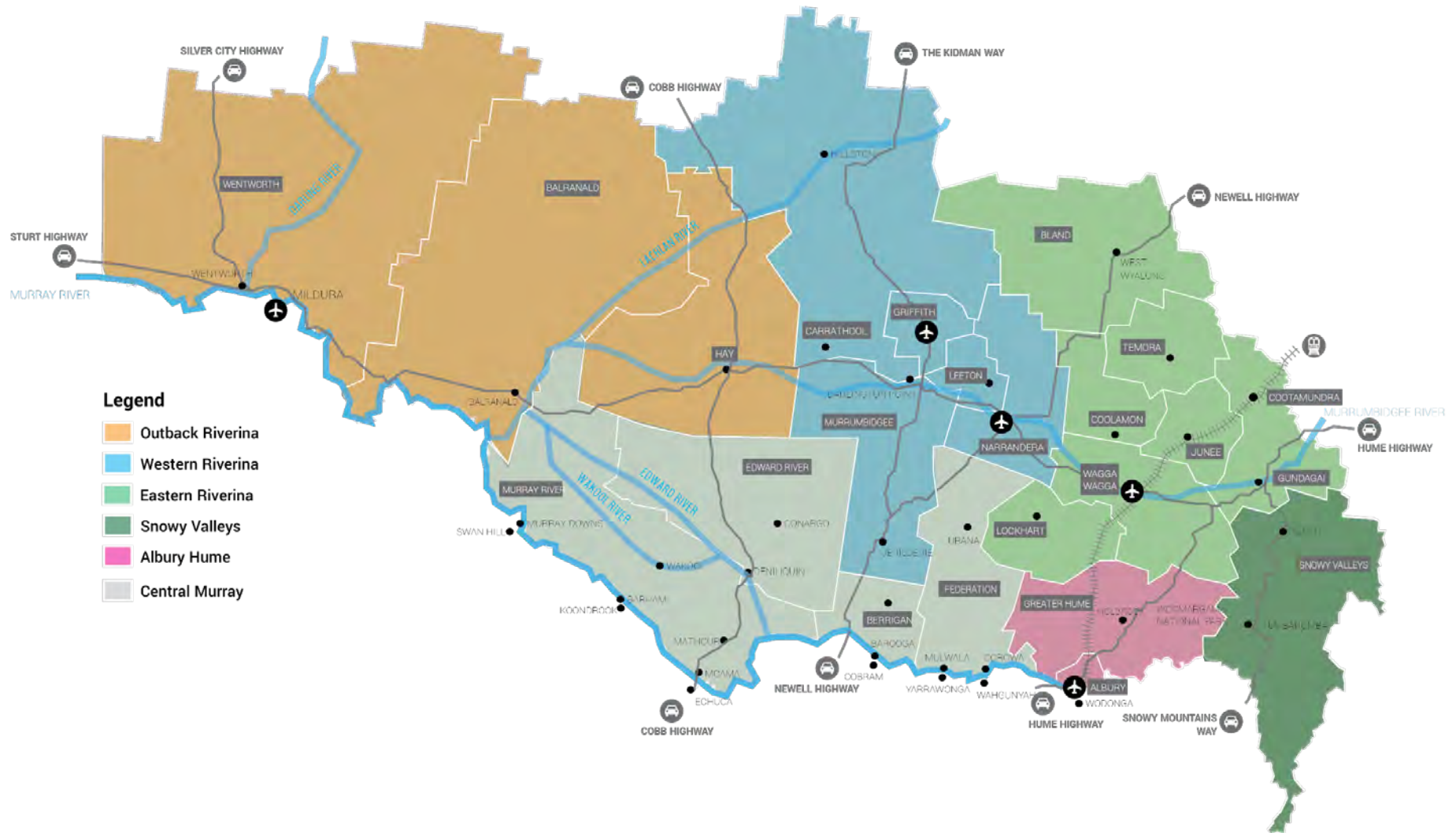
The location of Snowy Valleys Council presents a key challenge to increasing visitation from the major markets of Melbourne and Sydney, however, with strategic investment in infrastructure, the region is ideally located to capture high yielding Canberra visitors.

FIGURE 2 LOCATION CONTEXT



Source: Urban Enterprise, 2018

FIGURE 3 RIVERINA MURRAY SUBREGIONS



Source: Destination Riverina Murray, 2018; modified by Urban Enterprise, 2018.

PART A. BACKGROUND

2. SNOWY VALLEYS VISITOR ECONOMY

2.1. INTRODUCTION

This section provides an outline of current visitation to the Snowy Valleys and visitor trends over the past decade, including sub regional domestic visitation and trends, and a comparison to the wider Riverina Murray region.

A summary of key visitor demographics for the Snowy Valleys is also provided, as compared to Indigo Shire in Regional Victoria (a region with similar strengths to the Snowy Valleys region but a higher level of product development), and regional NSW. It also provides an economic, community and market profile for the region.

SUMMARY OF VISITATION TO SNOWY VALLEYS (2017)



Source: TRA IVS & NVS 2017

2.2. KEY FINDINGS

Snowy Valleys received over 422,300 visitors in the 2016/17 financial year, capturing a higher proportion of overnight visitors (47%) than the Riverina Murray region and the regional NSW average.

The Tumut subregion attracts significantly higher visitation than the Tumbarumba subregion, however visitor markets are quite different, with Tumut attracting a higher proportion of daytrip visitors (61%), than Tumbarumba, and the Snowy Valleys average. Visitor projections for the Riverina Murray region are strong, and Snowy Valleys currently attracts 8% of the Riverina Murray's total visitation.

The region attracts a significant proportion of holiday visitors, accounting for 62% of all daytrip visitors, 58% of overnight visitors and 52% of international visitors.

Visitor activity data highlights a low proportion of visitors who are eating out when compared to the Regional NSW and conversely a much larger proportion who are experiencing nature-based tourism activities.

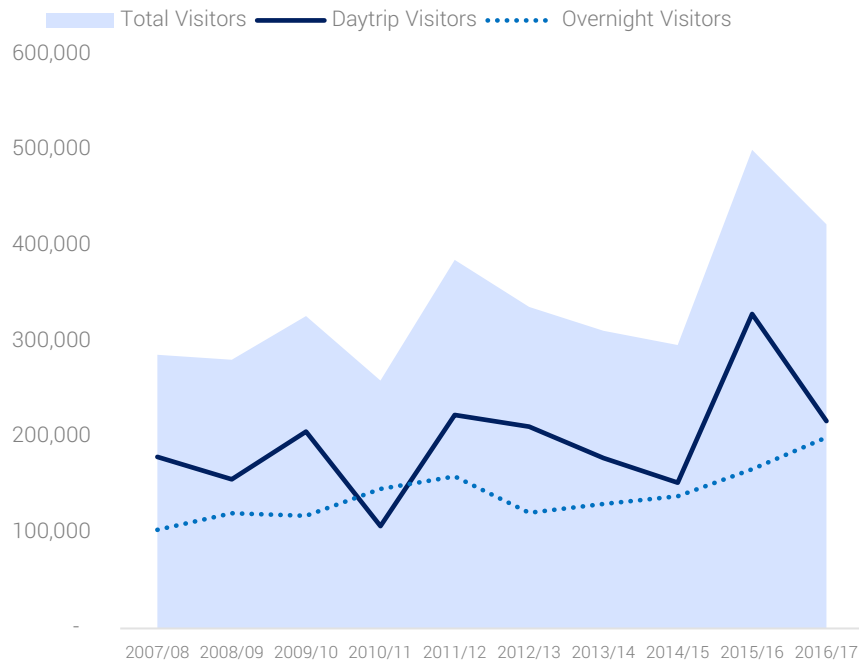
This highlights the strength of the region in nature-based tourism but also highlights the need for Snowy Valleys to deliver an improved food and beverage experience, which can leverage from the region's local produce strengths.

A large proportion of visitation to Snowy Valleys is generated by Regional NSW, and in particular, from Albury and Wagga Wagga. However Canberra, which is also in close proximity, currently has a low level of visitation to the region. Initiatives such as sealing and safety improvements of Brindabella Road could have a large impact in attracting the Canberra market.

2.3. SNOWY VALLEYS VISITATION TRENDS

Snowy Valleys received over 422,300 visitors in the 2016/17 financial year, comprised of 51% daytrip visitors, 47% overnight visitors and 1% international visitors.

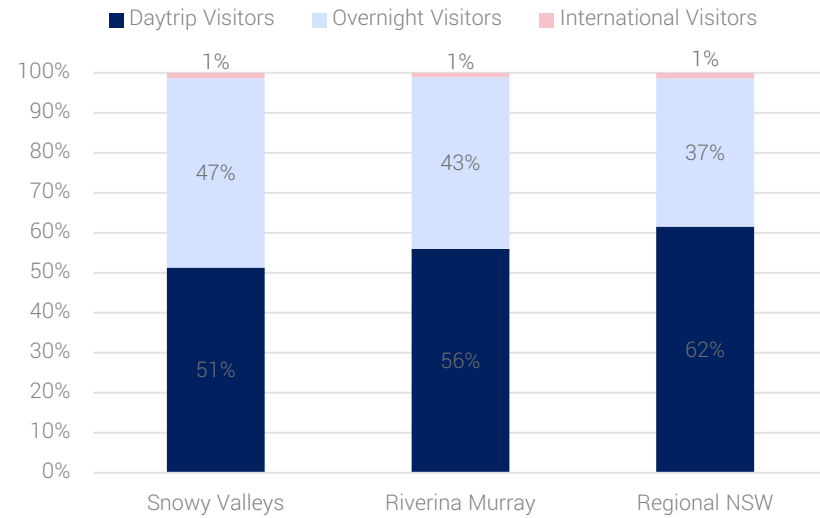
FIGURE 4 SNOWY VALLEYS VISITATION 2008-2017



Source: TRA IVS & NVS 2008-2017

In comparison to the Riverina Murray region and the regional NSW average, Snowy Valleys attracts a higher proportion of overnight visitors and a lower proportion of daytrip visitors (Figure 5).

FIGURE 5 COMPARISON OF VISITOR MARKETS BY PROPORTION



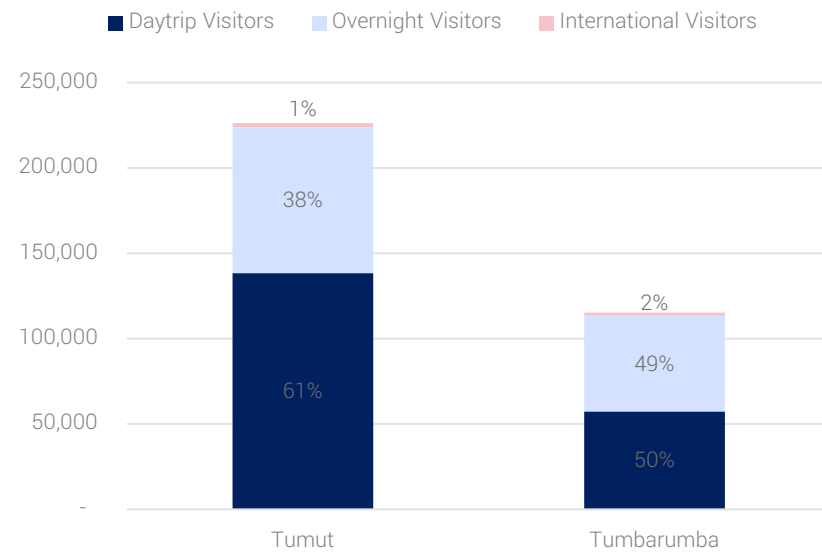
Source: TRA IVS & NVS 2008-2017

2.4. SUBREGIONAL VISITATION

On average, the Tumut subregion attracts an estimated 138,400 domestic daytrip visitors, 85,300 overnight visitors, and 2,500 international visitors per annum. Tumbarumba subregion, on average, attracts 57,300 daytrip visitors, 56,000 overnight visitors, 1,900 international visitors per annum.

Figure 6 provides a breakdown visitor market by proportion for each subregion. Interestingly it shows that by proportion, the Tumut subregion attracts a much larger proportion of daytrip visitors than the Tumbarumba subregion.

FIGURE 6 SUBREGION VISITOR MARKET BY PROPORTION



Source: TRA IVS & NVS 2008-2017

Figures 7 and 8 overleaf show the domestic visitation trends for Tumbarumba and Tumut subregions, as compared to the Snowy Valleys region as a whole.

FIGURE 7 DAYTRIP VISITATION BY SUBREGION

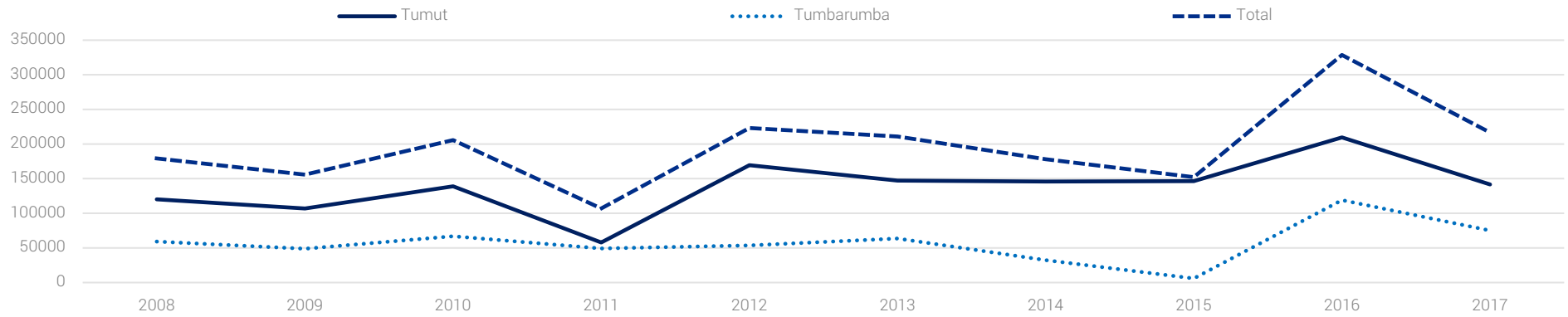
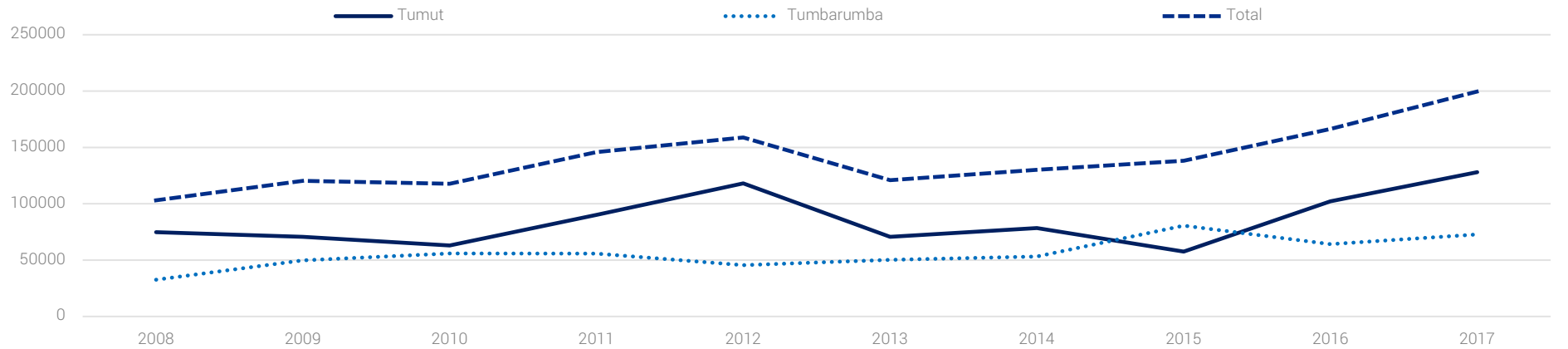


FIGURE 8 OVERNIGHT VISITATION BY SUBREGION



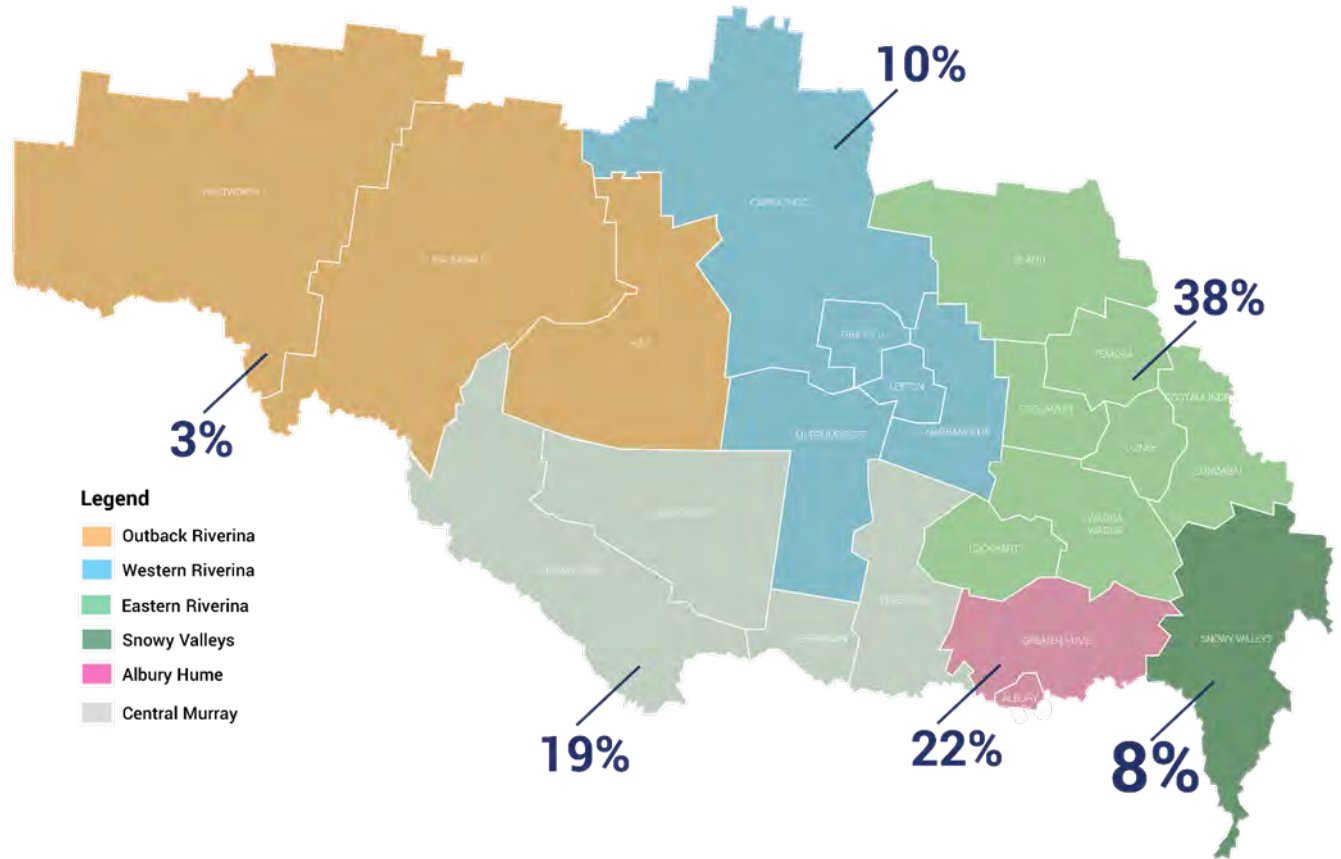
Source: TRA IVS & NVS 2008-2017

2.5. SHARE OF VISITATION

On average Snowy Valleys captures approximately 8% of total visitation to the Riverina Murray region¹ (Figure 9). In 2017 the Riverina Murray region attracted 5.26 million visitors comprised of 55% daytrip and 45% overnight visitors with both visitor markets growing strongly over the past decade, attracting an additional 1.3 million visitors between 2008 and 2017.

Eastern Riverina captures the largest share (38%) of visitation to the region.

FIGURE 9 SHARE OF VISITATION BY RIVERINA MURRAY SUBREGION



¹ Based on a three year average, 2014- 2017.

2.6. VISITOR DEMOGRAPHICS

Urban Enterprise conducted a review of key indicators for daytrip, overnight and international visitors to Snowy Valleys, as compared to Indigo Shire (a region with similar strengths to the Snowy Valleys region but a higher level of product development), as well as the regional NSW average (Table 1). Key findings included the following:

DOMESTIC DAYTRIP VISITORS

- 20% of visitors are under 25 compared to 11% for Indigo and 13% for Regional NSW, with the largest proportion of visitors (30%) over 55, which was lower than for both Indigo and regional NSW (36%);
- The majority of visitors to the Snowy Valleys are from within NSW (78%), however this is a lower proportion than for regional NSW (87%). Indigo Shire has a lower proportion of visitors originating from within its own state (66%) however they have a larger proportion of their Shire bounded by NSW states, and are in close proximity to the key border town Albury-Wodonga;
- Compared to Indigo and regional NSW, a higher proportion are holiday visitors (62%, as compared to 61% and 52% respectively), and a lower proportion are VFR (17% as compared to 23% and 27% respectively);
- A significantly lower proportion (38%) participated in eating/dining out at a restaurant and/or café during their trip, as compared to Indigo (59%) and regional NSW (45%);
- Sightseeing/looking around (26%), visiting friends and relatives (26%), visiting national / state parks (18%), and bushwalking (13%) were the most popular activities participated in, and fishing (8%) was also a much more popular activity than for the comparison regions; and
- The proportion of visitors shopping for pleasure (11%), which generates key in-region expenditure, was significantly lower than for Indigo (25%) and regional NSW (22%).

DOMESTIC OVERNIGHT VISITORS

- The largest proportion of overnight visitors (34%) are aged over 55, which is higher than for regional NSW on average (33%), but significantly lower than for Indigo (48%);
- Conversely with 21% of visitors aged 15-29, and 26% aged 30-44; visitors to the Snowy Valleys are significantly younger than for other regions within Riverina Murray;
- The vast majority of visitors are from NSW (70%), with the region attracting 28% of visitation from Sydney and 42% from regional NSW (which are both higher than for any other region within the Riverina Murray region). The region currently attracts a higher proportion of Victorian visitors (17%) than the regional NSW average (9%) and Canberra is a growing visitor source market, with 9% of visitors from ACT;
- The largest proportion are holiday visitors (58%), which is comparable to Indigo (57%), and higher than for regional NSW (49%). Significantly a lower proportion (25%) of visitors are VFR than for Indigo (32%) and regional NSW (35%);
- A low proportion (43%) of visitors eat out at a restaurant or café during their stay, which is reflective of the current limited food and beverage offer in the region; compared to 65% of visitors to Indigo and 57% of regional NSW visitors;
- The strength of the region's nature-based attractions is evident, with sightseeing (31%); bushwalking (25%), visiting national parks/state parks (24%), fishing (17%), picnics and BBQs (12%), and water activities/sports (6%) all popular visitor activities. The proportion of visitors who participate in bushwalking, visiting national /state parks and fishing are significantly higher than for both comparison regions;
- As with daytrip visitors, the proportion of visitors who shop for pleasure during their trip (10%) is significantly lower than for Indigo (26%) and regional NSW (23%). The proportion of visitors who visit history / heritage buildings, sites or monuments (5%) is low considering the available assets in the region,

significantly lower than the proportion of visitors who participate in this activity in Indigo (15%); and

- Additionally, the region attracts a significant proportion of visitors who are travelling as part of a group, including family group (with children) who comprise 21% of overnight visitors; and friends or relatives travelling together (with or without children) who comprise 25%;

INTERNATIONAL VISITORS

- The largest proportion of international visitors are aged 25-35 (23%), and in line with regional NSW, a lower proportion of visitors are over 55 than for Indigo (57%);
- The largest share of international visitors is from the UK (16%), however this was lower than for Indigo (20%) and regional NSW (21%). The region attracted a higher proportion of visitors from France (7%) and Canada (6%) than the comparison regions;
- The majority (52%) of international visitors are visiting for a holiday, however this was lower than for Indigo (68%) and regional NSW (54%), with a significantly higher proportion (15%) visiting for business than for Indigo (1%) and regional NSW (7%);
- Compared to visitors for Indigo and regional NSW on average, a lower proportion participated in sightseeing and looking around (76%), which may be attributable to the higher proportion visiting for business; and
- Interestingly a lower proportion participated in visiting wineries (20%) than in Indigo (53%) and regional NSW (21%), despite the region being home to the Tumbarumba wine region



Source: Snowy Valleys Council, 2018

TABLE 1 SNOWY VALLEYS DOMESTIC DAYTRIP, DOMESTIC OVERNIGHT AND INTERNATIONAL VISITOR DEMOGRAPHIC KEY INDICATORS

	Daytrip Visitors				Overnight Visitors				International Visitors			
	Indicator	Snowy Valleys	Indigo	Reg NSW	Indicator	Snowy Valleys	Indigo	Reg NSW	Indicator	Snowy Valleys	Indigo	Reg NSW
Age Structure	15-24 years	20%	11%	13%	15-24 years	11%	9%	15%	15-24 years	15%	6%	25%
	25-34 years	14%	19%	16%	25-34 years	17%	12%	17%	25-34 years	23%	13%	26%
	35-44 years	21%	19%	16%	35-44 years	18%	15%	18%	35-44 years	18%	11%	12%
	45-54 years	15%	15%	18%	45-54 years	19%	16%	18%	45-54 years	20%	13%	13%
	55+ years	30%	36%	36%	55+ years	34%	48%	33%	55+ years	24%	57%	24%
Origin State/ Country (Top)	NSW	78%	34%	87%	NSW	70%	26%	72%	United Kingdom	16%	20%	21%
	VIC	6%	66%	2%	VIC	17%	64%	9%	New Zealand	15%	16%	13%
	Queensland	0%	0%	6%	Australian Capital Territory	9%	4%	5%	United States of America	8%	11%	10%
	South Australia	0%	0%	0%	Queensland	2%	3%	12%	France	7%	5%	3%
	Other States	17%	0%	4%	South Australia	1%	1%	1%	Canada	6%	4%	5%
	-	-	-	-	Tasmania	0%	0%	0%	Scandinavia	5%	11%	4%
	-	-	-	-	Western Australia	0%	1%	1%	Germany	5%	8%	8%
-	-	-	-	-	-	-	-	China	4%	0%	4%	
Purpose of Visit (Top)	Holiday	62%	61%	52%	Holiday	58%	57%	49%	Holiday	52%	68%	54%
	VFR	17%	23%	27%	VFR	25%	32%	35%	Visiting friends and relatives	26%	27%	27%
	Business	11%	11%	10%	Business	11%	4%	12%	Business	15%	1%	7%
	Other	9%	5%	11%	Event	8%	4%	6%	Employment	4%	2%	4%
	-	-	-	-	In Transit	2%	2%	2%	Education	1%	1%	7%
	-	-	-	-	-	-	-	-	Other reason	1%	0%	2%
Activities (Top)	Eat out / dine at a restaurant and/or cafe	38%	59%	45%	Eat out / dine at a restaurant and/or cafe	43%	65%	57%	Eat out / dine at a restaurant and/or cafe	91%	93%	91%
	Sightseeing/looking around	26%	26%	16%	Visit friends & relatives	36%	36%	46%	Sightseeing/looking around	76%	86%	81%
	Visit friends & relatives	26%	26%	32%	Sightseeing/looking around	31%	40%	26%	Go shopping for pleasure	68%	81%	79%
	Visit national parks / state parks	18%	10%	4%	Bushwalking / rainforest walks	25%	11%	12%	Visit national parks / state parks	68%	73%	63%

Bushwalking / rainforest walks	13%	7%	4%	Visit national parks / state parks	24%	9%	10%	Pubs, clubs, discos etc	64%	57%	63%
Picnics or BBQs	11%	4%	5%	Pubs, clubs, discos etc	22%	21%	24%	Bushwalking / rainforest walks	57%	59%	47%
Go shopping for pleasure	11%	25%	22%	Fishing	17%	3%	9%	Go to markets	49%	57%	54%
None of these	10%	7%	14%	Picnics or BBQs	12%	6%	8%	Visit botanical or other public gardens	46%	63%	50%
Pubs, clubs, discos etc	8%	7%	8%	Go shopping for pleasure	10%	26%	23%	Visit history / heritage buildings,	46%	64%	43%
Fishing	8%	1%	2%	Go on a daytrip to another place	7%	9%	5%	Visit museums or art galleries	43%	60%	42%
Other outdoor activities nfd	7%	0%	1%	Other outdoor activities nfd	6%	2%	3%	Visit wildlife parks / zoos /	36%	48%	47%
Water activities / sports	6%	0%	1%	Water activities / sports	6%	2%	5%	Charter boat / cruise / ferry	31%	44%	44%
Attend an organised sporting event	5%	3%	3%	Exercise, gym or swimming	5%	5%	5%	Visit farms	28%	36%	19%
Visit history / heritage buildings, sites or monuments	4%	7%	2%	Snow skiing	5%	0%	1%	Go on guided tours or excursions	27%	31%	30%
Exercise, gym or swimming	4%	1%	1%	Visit history / heritage buildings, sites or monuments	5%	15%	4%	Attend Movies/Cinema	22%	18%	29%
Play other sports	3%	2%	3%	Play other sports	5%	1%	5%	Visit wineries	20%	53%	21%
Snow skiing	2%	0%	0%	None of these	4%	3%	8%	Experience aboriginal art / craft and cultural displays	19%	31%	19%

Source: TRA IVS & NVS 2008-2017

2.7. VISITOR PROJECTIONS

2.7.1. NSW VISITOR FORECASTS

Domestic tourism is expected to strengthen based on continued population growth, the low Australia dollar and steady economic growth; with China expected to be the largest source of growth in both inbound arrivals and inbound expenditure for Australia in the next decade.

Overall, domestic visitor nights are expected to increase at a rate of 3.0% per annum and international visitors 5.2% per annum to 2024/25 for regional NSW. For domestic visitor nights, business visitors are expected to experience the highest AAG at 5.7%, whilst international VFR visitors are expected to grow at 6.4% and holiday visitors 5.2% (Tables 2 and 3).

TABLE 2 DOMESTIC VISITOR NIGHTS IN REGIONAL NSW BY PURPOSE OF VISIT-FORECASTS 2016/17 – 2026/27

VISITOR NIGHTS (MILLION)	2016/17	2024/25	% AAG
Holiday	36.85m	44.67m	3.3% p.a
VFR	21.73m	25.46m	1.5% p.a
Business	9.49m	13.05m	5.7% p.a
Other	3.77m	4.23m	3.4% p.a
Total Regional NSW	71.85m*	87.40m*	3.0% p.a

Source: Tourism Research Australia Forecast Visitation 2016 Issue (State). *Total Regional NSW Visitation for 2024/25 not equal to visitation by purpose of visit type due to rounding.

TABLE 3 INTERNATIONAL VISITOR NIGHTS IN REGIONAL NSW BY PURPOSE OF VISIT FORECASTS 2014/15 – 2024/25

VISITOR NIGHTS (000S)	2014/15	2024/25	% AAG
Holiday	5.29m	7.36m	5.2% p.a
VFR	3.76m	5.74m	6.4% p.a
Business	.32m	.396m	0.2% p.a
Other	5.34m	7.07m	2.6% p.a
Total Regional NSW	14.70m	20.57m	5.2% p.a

2.7.2. RIVERINA MURRAY FORECASTS

The following provides an understanding of future visitation growth scenarios, and demand for tourism product in the Riverina Murray.

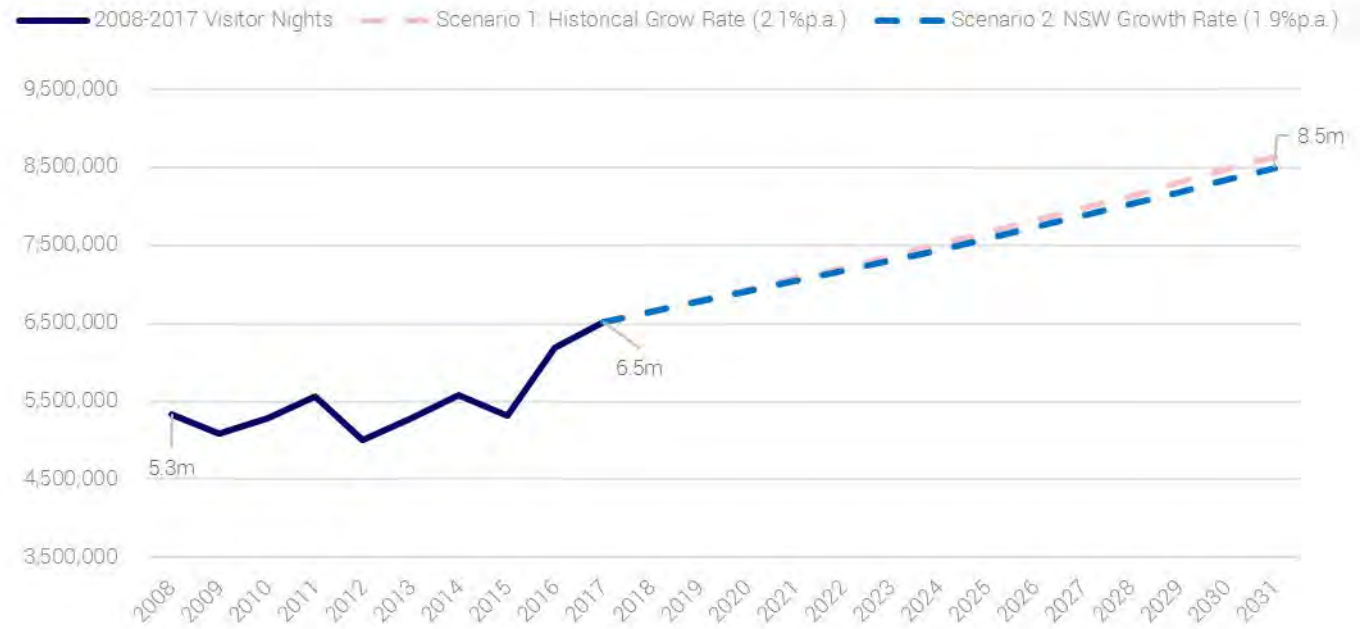
Figure 10 outlines two growth scenarios for visitor nights to 2031:

- **Scenario 1:** based on the historical growth rate for the region between 2008 and 2017 (2.1% per annum);
- **Scenario 2:** based on the projected growth rate for regional NSW between 2017 and 2027 (1.9% per annum)².

Based on the growth scenarios, the Riverina Murray is expected to grow from 6.5 million visitor nights in 2017, to 8.5 million by 2031, an additional 2 million visitor nights.

Tourism Research Australia’s forecasts domestic visitation to grow steadily over the coming years based on the likelihood of petrol prices remaining at, or near current levels (reflecting global oil supplies), and the Australian dollar remaining at its long-term average.

FIGURE 10 RIVERINA MURRAY DOMESTIC VISITOR NIGHTS PROJECTIONS



Source: TRA NVS & IVS Visitation 2007-2017 YE June, TRA State and Territory Tourism Forecasts 2017

² Tourism Research Australia, Tourism Forecasts 2017, August 2017

2.8. ECONOMIC PROFILE

The Snowy Valleys economy supports approximately 5894 jobs, with the main economic drivers coming from forestry and associated industry in the Tumut Region, and large scale agricultural production in the Tumbarumba/Batlow Region. Table 4 shows the number of jobs by broad industry sector in 2016.

TABLE 4 SNOWY VALLEYS JOBS BY INDUSTRY SECTOR

INDUSTRY SECTOR DIVISION	2016
Agriculture, Forestry and Fishing	1030
Manufacturing	855
Health Care and Social Assistance	555
Retail Trade	502
Accommodation and Food Services	411
Education and Training	406
Construction	328
Public Administration and Safety	327
Transport, Postal and Warehousing	256
Administrative and Support Services	201
Electricity, Gas, Water and Waste Services	197
Other Services	150
Professional, Scientific and Technical Services	113
Wholesale Trade	72

Arts and Recreation Services	64
Financial and Insurance Services	59
Rental, Hiring and Real Estate Services	29
Mining	21
Information Media and Telecommunications	17

Source: ABS Tablebuilder, Census data 2016, industry sector by place of work



Source: Snowy Valleys Council, 2018

2.8.1. TOURISM INDUSTRY

Within the broad industry sectors outlined in table 4, a number of specific ANZSIC industries correspond to tourism related industries as defined in the Australian Tourism Satellite Account. Table 5 shows the proportion of jobs in each sector that are within industry categories classified as tourism industries (see Appendix A for further detail). The high proportion of tourism industry related jobs for industry sectors such as Retail Trade, Accommodation and Food Services, and Arts and Recreation Services is indicative of a high level of employment supported by the visitor economy.

TABLE 5 % OF SNOWY VALLEYS JOBS WITHIN TOURISM INDUSTRY SECTORS

INDUSTRY SECTOR DIVISION	2016
Retail Trade	79%
Accommodation and Food Services	98%
Transport, Postal and warehousing	10%
Rental, hiring and real estate services	10%
Administrative and support services	3%
Arts and recreation services	80%

Source: ABS Tablebuilder, Census data 2016, industry sector by place of work; 5249. - Australian National Accounts: Tourism Satellite Account, 2013-14, Appendix 1 Tourism Industry Correspondence, Tourism Related industries.

TUMUT

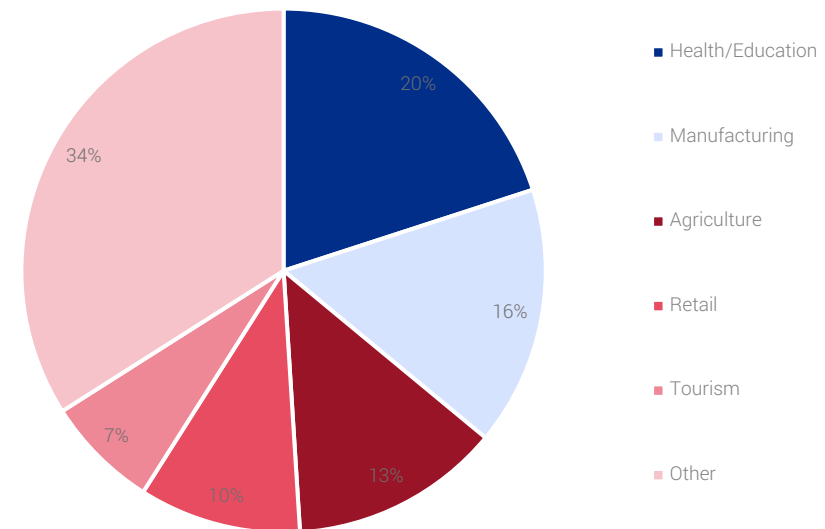
The Tumut economic profile completed in 2015 identified that the economy of the Tumut subregion (formerly Tumut Shire) is driven mainly by agriculture and forestry, with both sectors creating the resources for large-scale processing and value-

adding. Major sectors identified were manufacturing (predominantly timber); horticulture/agriculture (including forestry); and tourism.

The annual value of the tourism sector in Tumut in 2015 was estimated at \$39 million, with around 300 jobs directly created by tourism activities, and a further 150 jobs indirectly supported.

Figure 11 shows that by proportion, the health/education industry was the largest employer in Tumut (20%), followed by manufacturing (16%) and agriculture (13%) respectively.

FIGURE 11 2015 EMPLOYMENT IN TUMUT BY PROPORTION



Source: Tumut Shire Economic Profile 2015

TOURISM BUSINESS SURVEY

As part of the consultation process, an online business survey was conducted which yielded 42 responses from tourism businesses within the Snowy Valleys. Of these businesses, 32 were from within the Tumut subregion (24 of which were within the Tumut township), and 10 from within the Tumbarumba subregion.

The largest proportion of businesses who responded to the survey were accommodation providers (15), followed by retail (5) restaurants (2) and wineries (2), with one business each for sport & recreation, tours & activities, antiques/galleries/art & craft, attractions, cafes/bakeries/take away, health/spa, and local produce, and a further 11 'other' businesses.

Lack of/ or poor marketing and promotion, and obtaining a development approval / planning barriers were identified by the most respondents (both 17%) as the greatest barrier to growing their business. All other responses (The expense of marketing campaigns, Government regulation, Seasonality issues, Visitor demand, Access constraints, Attracting quality staff, and Labour costs) were all identified by at least one business/respondent as their greatest barrier, along with a variety of other responses including the distance from target markets, promotional issues, retaining quality staff, seasonality of visitation and complexities of working with multiple government agencies management authorities operating in the area.

2.9. COMMUNITY PROFILE³

Snowy Valleys Council is home to 14,395 residents, spread across more than 8,960km². Tumut is the largest township in the region with over 6,230 residents, followed by Tumbarumba (1,862 residents) and Batlow (1,313), with smaller townships including Adelong (943), Khancoban (304) and Talbingo (239). Of the region's population, 50.6% are male and the median age is 45, compared to 38 for NSW on average. A total of 3,762 families live within the Snowy Valleys across a

total of 6,928 dwellings, with the average median weekly household income of residents lower than the NSW average (\$1,120 compared to \$1,486).

Culturally, the area is fairly homogenous, with 72.2% of residents having both parents born in Australia. Significantly, 4.4% of Snowy Valleys population are of aboriginal or Torres Strait Islander descent, compared to 2.9% for NSW.

Residents of the Snowy Valleys have a lower educational attainment as compared to the NSW and Australian averages. Only 9.7% of Snowy Valleys residents hold a bachelor's degree or above as compared to 23.4% for NSW and 22% for Australia. 17.6% of Snowy Valleys residents are educated to year 10 (compared to 11.5% for NSW and 10.8% for Australia), and 13% of residents are educated to only year 9 or below (as compared to 8.4% for NSW).



Source: Snowy Valleys Council, 2018

³ ABS Censusdata Quickstats

2.10. MARKET PROFILE

This section provides a market profile for the Snowy Valleys region based on a summary of the identified key major markets for the Riverina Murray region as identified in the DMP currently underway, and a summary of the existing and target visitor markets identified for the Snowy Valleys during the DMP consultation process.

2.10.1. RIVERINA MURRAY KEY MARKETS

Through a combination of visitor profile analysis, consultation and key information sourced from DNSW visitor market profiles, the following major markets were identified for the Riverina Murray region.

EXISTING CORE MARKETS

The following are identified core markets for the Riverina Murray region:

Visiting Friends and Relatives (VFR)

The VFR market is recognised as a key visitor market, particularly for regional areas. 35% of all overnight visitors to the Riverina Murray are for the purposes of visiting friends and relatives. Research by DNSW has highlighted the important role that VFR hosts play influencing trip activities and itinerary recommendations.⁴ It is vital to equip hosts with necessary information to positively stimulate interest in the Riverina Murray and act as ambassadors for the region. It is also important to note that VFR hosts are likely to actively participate in tourism related activities and contribute local expenditure. This is commonly omitted from tourism expenditure and economic impact models. According to DNSW research, VFR hosts spend on average \$73 per night for domestic visitors and \$87 per night for international visitors. This translates to approximately \$59 million of additional tourism related expenditure in the Riverina Murray (based on 2017 VFR numbers).

⁴ DNSW, VFR Host Research March 2016

Grey Nomads

Grey Nomads are a key market for the Riverina Murray with approximately 28% of visitors aged over 60 years and over 20% of overnight visitors staying in a caravan park or camping ground. The region includes a number of major highways which are popular routes and stopping points for caravaners undertaking large trips. This market can be perceived as relatively low yielding however they are very important to smaller towns, particularly those which are RV friendly. This market is expected to increase in the future in terms of both size and spending power due to an ageing population with high levels of disposable income. This is evidenced by data indicating that Australians over the age of 55 account for 32% of the nation's gross disposable income.⁵

Families

Families are a core market for the region with approximately 20% of overnight visitors travelling as a family group (parents and children). It is important that investment in family experiences and attractions is encouraged to grow this market, as well as, catering to the growing population of young families in the region's major centres. An important consideration for this market is value for money, convenience, and accessibility.

Business

11% of all overnights visitors to the region visiting for business related travel. The Riverina Murray includes a number of major regional centres which support a large business base and facilitate business travel. Business travellers are generally considered high yielding and are particularly important for accommodation sector in driving mid-week and off-peak occupancy. It also provides the opportunity to generate repeat visitation to encourage business travellers to return for leisure purposes with their families.

Working Holiday Makers (WHM)

The Riverina Murray is a major agricultural region which attracts large numbers of WHM. In 2017 NSW received 212,000 working holiday makers, spending \$1.1 billion

⁵ DNSW Over 55s Travel to NSW May 2015

in the NSW economy.⁶ Many WHM stay in a particular destination for a minimum of 88 days to fulfil visa extension requirements⁷. More can be done to further engage with this market to increase yield. Mildura Regional Development (which also includes Wentworth) are currently developing a backpacker strategy.

Educational tourism

Education tourism was identified as an important niche market for a number of destinations. Interest groups associated with the natural environment, agriculture and heritage are inclined to stay for longer periods than the average visitor.

Events and Festivals visitors

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

POTENTIAL NEW TARGET MARKETS

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

International Experience Seekers

The international experience seeker/self-drive market is identified as a key market by Tourism Australia. Experience seekers are not characterised by nationality, but seek out authentic experiences which are engaging and have an educational element. They are more likely to visit regional areas, stay longer in the region, and are less attracted to 'mass packaged tourism products'. At present they do not make up a large portion of visitation to the region, however, there is an opportunity to develop personalised experiences using the region's strengths in indigenous culture, rural Australia character, and nature-based assets.

Millennials / Young Travellers

This market segment includes persons aged between 15 - 29 as well as those aged 30-34 who do not have children.⁸ Research undertaken by DNSW shows that there is currently low awareness of regional tourism destinations amongst millennials, particularly in inland NSW. Key factors affecting their travel choices include:

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

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

- Events that allow discovery of a location in a unique way;
- Nature and landscapes;
- Experiences that are unique to a specific area;

⁶ DNSW Working Holiday Markers to NSW, March 2017

⁷ WHM need to accrue 88 days working in a regional area. This can be spread across multiple locations.

⁸ Tourism Research Australia, in partnership with DNSW, Attracting Millennials to Regional New South Wales, November 2017

- Food and lifestyle; and
- History of a destination with a contemporary or personalised interpretation.

2.10.2. SNOWY VALLEYS KEY MARKETS

Regional NSW, Sydney and the ACT were identified as the most important existing geographic markets for the region, with over two thirds of business respondents to an online survey identifying that their business currently had visitors from each of these markets, and over a quarter identifying that these markets had increased over the past 5 years.

Within this survey a number of visitor types were identified as important to the Snowy Valleys region, with families, grey nomads, business visitors, VFR, and events visitors (and to a lesser extent international tourists) all identified as very important by the majority of respondents. Other potential target markets for the region include International Experience Seekers specifically, Working Holiday Makers (WHM), educational tourists and Millennials / young travellers.



Source: Snowy Valleys Council, 2018

3. STRATEGIC CONTEXT

3.1. INTRODUCTION

As part of the development of the Tourism Destination Plan a review of Federal, State and Local planning policies has been undertaken. This section of the report provides a summary of key strategic tourism documentation for the Snowy Valley Council.

3.2. KEY FINDINGS

There is strong strategic support from both Federal and State policy to grow tourism in regional NSW. This is to be done through a change in mindset and improved services, private sector investment, tourism infrastructure and marketing. A more robust industry is to be achieved through a more diverse and skilled workforce and improved management.

There is both Federal and State focus on developing the Asian tourism market through improved experiences for Asian visitors. There is also both Federal and State policy that supports the development of authentic Aboriginal tourism opportunities.

Regionally, the new alliance with Destination Riverina Murray provides a significant directional shift in regional branding for Snowy Valleys Council, with a move away from a primarily snow-based product, to a focus on a wider range of nature-based tourism, touring, rivers and waterways and food and agritourism.

At a local level, an extensive body of prior studies have been undertaken for the former Tumut and Tumbarumba Shires, however the amalgamated Snowy Valleys region requires clear actionable directions in order to reach its tourism potential afforded by its extensive natural and historical assets.

3.3. FEDERAL TOURISM POLICY

TOURISM 2020 STRATEGY

The Tourism 2020 strategy was developed to provide long term goals for the Australian tourism industry. The six key areas of the strategy include:

- Grow demand from Asia;
- Build competitive digital capability;
- Encourage investment and implement the regulatory reform agenda;
- Ensure tourism transport environment supports growth;
- Increase supply of labour, skills and Indigenous participation; and
- Build industry resilience, productivity and quality.

3.4. STATE TOURISM POLICY

FINAL REPORT OF THE VISITOR ECONOMY TASKFORCE

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

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

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

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

ABORIGINAL TOURISM ACTION PLAN 2017- 2020

The vision of the Aboriginal Tourism Action Plan is to continue to support the development and promotion of NSW Aboriginal cultural tourism experiences, products and businesses leading to:

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

There four key goals of the Action Plan, which include:

- **Goal 1** - Continue to build consumer awareness of Sydney and Regional NSW as destinations where Aboriginal culture is strong, vibrant and diverse;
- **Goal 2** - Increase the inclusion of export-ready experiences in travel, trade distribution networks and marketing programs;
- **Goal 3** - Develop new sustainable market-ready and export-ready Aboriginal cultural tourism products and events; and
- **Goal 4** - Build on the success of cross-cultural exchange between NSW Aboriginal cultural tourism, Government and the Destination Networks.

NEW SOUTH WALES ABORIGINAL TOURISM TOOLKIT

The New South Wales Aboriginal Tourism Toolkit is a blueprint for growth of internationally ready aboriginal tourism product in NSW. The toolkit showcases 17 export ready tour products throughout the State. There are no specific export ready tour products identified in the Snowy Valley region.

CHINA TOURISM STRATEGY 2012- 2020

There is specific State tourism strategy to direct business development and consumer marketing activity between 2012- 2020, as forecasts for 2020 indicate that the inbound market from China is set to more than double in size, contributing more than one million visitors to Australia and more than \$6.8 billion in Total Inbound Economic Value. The eight strategic directions outlined in the policy include:

- Extend Marketing Activity into more Geographic Source Markets;
- Support Aviation and Route Development to Keep pace with demand;
- Target High Performance Consumer Segments;
- Improve the Quality and Range of Visitor Experiences
- Increase Consumer Promotion
- Develop Trade Distribution Networks
- Expand Commercial and Government Partnerships
- Increase Resources to Facilitate Growth.

DESTINATION NETWORKS: DRIVING GROWTH OF THE VISITOR ECONOMY IN REGIONAL NSW (2016)

The Destination Networks report provides guidance on the new structure and governance of the tourism regions across NSW. The report identifies the role of the Destination Networks to facilitate visitor economy growth at the local level, through representing and co-ordinating the region's tourism industry. Snowy Valley Council is identified as part of the Riverina Murray Destination area.

The core responsibility of the Destination Networks is outlined as:

- Industry Engagement and Industry Development;
- Product Development;
- Training and Education;
- Preliminary Review of Local RVEF (Regional Visitor Economy Fund) Applications to ensure quality/compliance with guidelines. and
- Collaboration with DNSW on industry activities.

3.5. REGIONAL POLICY

On a regional level, the following policy documents apply to the development of the Snowy Valleys DMP.

DESTINATION RIVERINA MURRAY STRATEGIC PLAN 2017-18

The aim of the Destination Riverina Murray Strategic Plan is “to strengthen the region’s visitor economy by developing strong partnerships with industry, local government and tourism organisations to collectively contribute towards increasing visitation, expenditure and dispersal within the Riverina Murray region.”

This will be achieved through the following key objectives:

- Increase visitation, length of stay and expenditure to the region year-on-year.
- Position the Riverina Murray as one of the leading regional destinations for nature-based activities and experiences, Aboriginal tourism, regional conferencing, and agritourism.
- Encourage local residents to experience the region and become champions for the visiting friends and family market.
- Increase the number of large scale events with a focus on attracting visitors.
- Grow the profile of the Riverina Murray region, specifically in the capital city markets of Sydney, Canberra, Melbourne and Adelaide.
- Identify and work to improve the region’s accessibility by road, rail and air travel.
- Focus on the opportunities to increase visitation from international markets.

The plan outlines six core priorities and actions to achieve these objectives which are

1. Destination Management Planning;
2. Destination and experience development;
3. Develop the region’s capacity and capability to attract events and conferences;
4. Build digital capability and encourage the use of technology;
5. Increase investment in the region’s tourism related infrastructure; and
6. Focus on opportunities in international markets.

RIVERINA MURRAY DESTINATION MANAGEMENT PLAN (DRAFT)

The Riverina Murray Destination Management is currently underway and is being carried out by Urban Enterprise. Findings at a regional level have been incorporated within this report as appropriate.

The following strategic development themes have been identified within the Riverina Murray DMP currently underway:

- **Theme 1: Major Centre Development** - Develop the major regional centres to support a diverse visitor economy and projected visitor growth;
- **Theme 2: Nature-Based Tourism** - Utilise the region’s natural assets to develop nature-based and recreational tourism experiences;
- **Theme 3: Rivers and Waterways** - Improve visitor access and experience to major rivers and lakes to increase water-based activities;
- **Theme 4: Food and Agritourism** - Leverage the region’s agricultural strengths by encouraging the development of contemporary food experiences;
- **Theme 5: Major Touring Routes** - Harness the region’s major transport corridors, heritage, and charming small towns to develop easy to navigate touring routes;
- **Theme 6: Sport and Recreation** - Unlock the strong sporting culture and infrastructure of the region to develop recreational experiences and attract major sporting events and carnivals;
- **Theme 7: Events and Festivals** - Developing a coordinated approach to festivals and events through increasing presence in the business and conference market;
- **Theme 8: Accommodation** - Improve and diversify the range of accommodation in the region matched to contemporary market demands; and
- **Theme 9: Infrastructure and Servicing** - Ensure that investment in key infrastructure and visitor servicing keeps pace with visitor growth and expectations.

SNOWY MOUNTAINS SUB ZONE NATIONAL PARK TOURISM VISITOR PROFILE

The Snowy Mountains sub zone National Park Tourism Visitor Profile has been compiled by data-mining the National and International Visitor Survey data-sets. Some of the key findings include:

- Overall domestic overnight visitors volume to the Snowy Mountains sub zone has changed little over the past 15 years. The high point was reached early in this period;
- The Sydney Region has maintained its position as the most significant source market over this period, although volume from this Region has been slowly declining;
- The much smaller markets of Canberra and South Coast occupy second and third positions respectively. Other Regions are not considered significant.
- Contrary to overall sub zone visitor volume, national park visitors in the sub zone have grown considerably over the past 15 years. This has been consistent apart from the period ending June 2012. If past trends continue, national park visitation is likely to approach 250,000 over the next five years.
- The single most significant source has been the Sydney Region. Canberra and South Coast Regions form a 'second tier' of source markets.
- Canberra's growth has been the highest of the top three markets. Should this continue, it will grow to occupy the position of second most significant market without sharing this position.

KOSCIUSZKO NATIONAL PARK CYCLING STRATEGY (2016)

The vision for the Kosciuszko National Park Cycling Strategy is:

By 2025 Kosciuszko will have made a positive contribution to the wider Snowy Mountains region, being recognised nationally for outstanding sustainable cycling experiences.

This will be achieved through four key goals, with associated actions. The goals are:

- Manage cycling to produce positive and sustainable outcomes for conservation, recreation and tourism

- Improve existing tracks and trails to meet consumer demand and add value to the park's natural and cultural values.
- Develop new tracks and opportunities that meet consumer demand and are compatible with Kosciuszko National Park's natural and cultural values including responding to external investment proposals.
- Collaborate with cycling organisations, local communities and the private sector to maintain and promote cycling opportunities in the park.

The Strategy recognises the Tumut Mountain Bike trails as highly regarded by riders of all standards being 7.3 km in length, with a 70/30 mix of single tracks have been purpose built and are made up of the three well signposted loops and one connection trail that is more XC- focused. Tumut is also recognised as a visitor node that has potential to expand to become known as a biking destination.

SNOWY MOUNTAINS DESTINATION MANAGEMENT PLAN (2013)

The Snowy Mountains Destination Management highlights the key challenges facing the Snowy Mountains tourism industry and provides an implementation plan to achieve the vision for tourism, that "the Snowy Mountains will be recognised as the premium Australian all-year round, all-age visitor destination for snow sports, and a wide range of alpine and sub-alpine recreational activities, achieving strong visitation, yield and length of visitor stay.

The key challenges recognised in the plan is the highly seasonal nature of the Snowy Mountains and the lack of out of ski season product in Tumut and Tumberumba.

UPPER MURRAY 2030 MASTERPLAN

The Upper Murray 2030 Masterplan, produced by Planisphere in 2016 for Towong Shire and the former Tumberumba Shire and included extensive community consultation identifying 500 community projects, of which 40 themed ideas were progressed to prioritised community initiatives and five concept plans. The identified vision for the area was:

The Upper Murray is known throughout the nation as a place of extraordinary natural beauty and unsurpassed mountain views. The region's focus is the

Murray River, which has shaped the landscape and the people who live beside it.

The Upper Murray is home to resilient communities who work collaboratively towards a shared vision.

The Upper Murray 'brand' is well known to tourists and foodies reflecting a pristine environment, 'real' Australian experience and quality agricultural product.

There is a range of employment and education opportunities that support a diverse, resilient and healthy community. Quality health and social networks reinforce a sense of belonging and support.

Local food is plentiful and affordable. Arts and cultural experiences are celebrated throughout the year.

Local townships within the Upper Murray have a strong character, are walkable, local and friendly, offering services to the local market and tourists alike.

The Masterplan identified four objectives: governance and implementation; business and industry; infrastructure and built environment and wellbeing & liveability, with projects split into the following themes.

Identified initiatives of relevance under each objective included:

Governance and implementation:

- Creation and development of the Upper Murray Brand

Business and industry:

- Improve existing tourism facilities and identify new opportunities;
- Develop value adding strategies for Upper Murray's agricultural product;
- Support existing agricultural enterprise and work towards job creation through diversification and education; and
- Support the Upper Murray as an authentic outdoor destination which offers a variety of activities.

Infrastructure and the built environment:

- Create an iconic 'great river road' tourist drive;
- Develop outdoor assets;
- Develop driving and cycling routes (including signage) across the Upper Murray;
- Develop tourist and fitness trails;
- Lobby for improvements to mobile telephone and internet coverage;
- Become 100% renewable, reliable, sustainable and responsible;
- Lobby for highway upgrades;
- Create tourist towns;
- Upgrade Corryong and Khancoban airports; and
- Improve access to the river

Wellbeing and liveability:

- Establish the Upper Murray as a place of health and wellbeing;
- Investigate options for public transport improvements;
- Support networking, skills sharing, upskilling and mentorships;
- Improve access to fresh and healthy food;
- Establish the Upper Murray as a destination for arts and culture;
- Develop infrastructure to support health, recreation and wellbeing;
- Ensure towns and attractions are accessible to all users and facilities are available for an ageing population;
- Audit existing community assets and plan for their repair or removal

Concept plans were developed for the following:

- Brand;
- Tourism;
- Great River Road;
- Town Trails; and
- Agriculture.

3.6. LOCAL POLICY

TUMUT REGION DESTINATION MANAGEMENT PLAN (2015)

The Tumut Region Destination Management Plan was commissioned by Tumut Shire Council and was intended as an industry resource to guide tourism development and define the roles, responsibilities and actions of the various stakeholders in the management of the destination.

The primary elements and activities that are identified for their clear market potential include:

- **Trees** - In particular the range of blossoming and deciduous trees and the quality of them;
- **Waterways** - Rivers, streams and other water assets- variety, flat and small rapids, level reliability and cleanliness;
- **Dams** - Large number, area covered and geographical setting, water reliability and cleanliness;
- **Fauna** - Wide range and high likelihood of seeing fauna not typically spotted in other destinations;
- **Aboriginal Connection with the Area** - Significance of the geographical context that has shaped the relationship;
- **National Parks and State Forests** - Area covered including second largest State Forest in NSW, unique elements; and
- **Night Sky** - 'Dark Park' qualities i.e. extremely low level of light pollution.

TUMUT SHIRE VISION 2020, PETER ELLYARD (1998)

The vision for 2020 is outlined as follows:

We are a diverse rural community, working to improve the well being, welfare and prosperity of all people in our community, whilst caring for and sustaining our environment well in to the future.

TUMUT SHIRE VISION 2020 PHASE 2: DEVELOPING THE STRATEGIC ACTION PLAN, PETER ELLYARD (1998)

Phase 2 of Tumut Shire 2020 identifies the key pieces of organisational structure required to realise the vision for Tumut. The plan identifies the following key themes:

- **A 21st Century Industrial Base** - In addition to enriching traditional primary and service industries (e.g. forestry and timber, apples and tourism), the creation of new enterprises focusing on emerging global markets (for example wellbeing, earth repair, sustainable energy, organic farming, artisanship and content provision, adventure tourism and extreme sports);
- **Education and Learning** - A vastly enhanced life-long education system will enhance people personally and expand their economic opportunities, and become a significant export industry. This will also help in the 'youthing' of the shire because many young people will come to learn here. If young people come our own young will be less likely to leave
- **Wellbeing** - The physical attributes of the region, including its isolation and remoteness, lend themselves magnificently to the establishment of a thriving health promotion, recreation and personal development industry.
- **Knowledge** - Distinct from the education sector, the creation of both knowledge-rich industries and world-class research and development facilities;
- **New 'Old' Activities** - Introducing, expanding and updating arts and crafts, recreation, leisure.
- **Festivals and Events** - Establishing events which celebrate the heritage and nature of the region, for people to organise, run, and attend, to increase the enjoyment of residents and visitors alike, develop the service industrial base and attract tourists.

A number of specific event ideas were identified as part of this theme which have also been taken into consideration.

TUMUT SHIRE TOURISM STRATEGY (2013)

The Tumut Shire Tourism Strategy was prepared by Waples Marketing in conjunction with Tourism Strategy Development Services, to guide the long term sustainable development of the tourism industry. A number of major attractions were identified

as part of this strategy which have been incorporated into the visitor product and experience profile.

TUMUT BRANDING STRATEGY

Tumut region's Positioning statement is to *"create your own adventure let your spirit soar and feel the sense of freedom as nature unfolds before you"*

TUMBARUMBA SHIRE COUNCIL TOURISM STRATEGY 2011- 2016

Key findings, as identified within the Tumbarumba Shire Council Tourism Strategy 2011-2016 included:

Opportunities:

- Destination promotion and marketing should be directed towards a focus on the identified markets. These markets should be reviewed annually in conjunction with feedback from the tourism focus groups, an annual tourism survey, the Tourism Advisory Committee and Tourism Snowy Mountains. Consider funding towards market research;
- Work with Tourism Snowy Mountains for campaigns which provide opportunities for direct participation from market ready operators;
- Continue to support all tourism activities that are based on local food and wine;
- Support initiatives that encourage nature-based activities;
- Continue to support events which fulfil the guidelines adopted by Council for funding, based on an expectation of events becoming sustainable. The essence of the guidelines is that events should maximise the economic and social benefits generated by the events, increase visitation and length of stay, contribute to the branding and reputation of Tumbarumba Shire and the Snowy Mountains region as a domestic and international tourism destination; and
- Integrate promotion of significant events in the marketing campaigns for the Snowy Mountains region through Tourism Snowy Mountains.

Communication:

- Include tourism activities in Council's information to the wider community;

- Through the Tumbarumba Visitor Information Centre, facilitate the distribution of a regular newsletter compiled from information received from businesses/event organizers;
- Encourage and facilitate regular informal meetings of tourism focus groups. It is expected that these groups will provide feedback to Council's Tourism Advisory Committee, through Council's Tourism Promotion Officer;
- Work with Tourism Snowy Mountains to encourage improved engagement with SMEs, including regular discussion with the tourism focus group; and
- Encourage TSM to hold meetings in Tumbarumba and network with SMEs, with the local business group and/or chamber acting as a coordinating body to ensure operator participation.

Industry Development

- Facilitate the introduction of appropriate, short training programs in association with TSM;
- Develop an ongoing program annually in association with TSM; and
- Develop and maintain a data base of operator training.

Promotion and Marketing

- Council should continue to provide administrative/capacity funding annually but can expect TSM to demonstrably engage with the tourism SME sector by: Increased SME membership of TSM; Further industry development through a program of training and workshops Ensuring that Partnership program funds and appropriate marketing campaigns are provided by TSM to ensure that SM's meet the objective of redirecting marketing funds to attracting visitors;
- Continue open and regular communication between Tumbarumba Shire Council and Tourism Snowy Mountains to keep the right balance between expectations and resources for marketing operations, and to ensure that the focus remains on engagement of the tourism industry in destination marketing;
- Continue to promote the Snowy Valleys Way and Kosciuszko Alpine Way touring routes;
- Maintain and improve tourism web presence and information and enhance electronic promotion and communications generally; and

- Provide specific information on scenic drive options, walking, cycling, 4WD tracks and trails, fishing and camping spots. Distribute locally through the VIC and business operators, and make available for download on the tourism website.

Infrastructure

- Facilitate and coordinate in order to streamline the infrastructure development process;
- Continue to liaise with NPWS on the development of a NPWS visitor centre on the Alpine way at Khancoban, and make available loan funding when required;
- Identify and develop tracks and trails suitable for walking, cycling, horse riding, four wheel driving;
- Ensure directional and tourism signage is satisfactory and current;
- Ensure regular maintenance of picnic/camping areas and review need for upgrade annually;
- Support the development of the Riverina Highlands Rail Trail;
- Create more recreational facilities in town areas; and
- Improve availability of public transport information and continue to lobby for improved provision of public transport.

Although a number of these initiatives have now been completed (such as the Khancoban visitor centre), or are no longer relevant (such as references to TSM and the Kosciuszko Alpine Way), many are still relevant.

SNOWY VALLEYS COUNCIL 10 YEAR STRATEGIC PLAN (UNDERWAY)

Snowy Valleys Council is currently undertaking a 10-year strategic plan.

The following key findings have been identified as key outcomes from the community consultation, which will be used to inform the draft CSP:

- The people in the Snowy Valleys Council communities are very passionate about retaining local identity, and support equitable services across all communities;

- There is a strong desire for Council to communicate and share information with the community, and for Councillors, the senior executive and staff to 'show their faces' and be accessible;
- Post-merger communication, engagement and follow up actions are critical to rebuilding the lack of trust which was developed during the merger process;
- Tourism, specifically adventure tourism, and event support are seen as a key to boosting community longevity, vibrancy and ensuring a sustainable future;
- Essential infrastructure, particularly road base maintenance and sealing roads is seen as important, particularly to support community links, economic development, tourism and growth;
- Community and tourism aspirations focus on delight in the natural environment of the area, the cleanliness of lakes and streams, beauty, accessibility, climate, local history, and genuine cultural experiences with traditional owners; and
- Supporting the local economy is viewed as critical, including continued partnerships with established industries such as agriculture and timber, and developing a strategy to attract new and diverse industries.

TUMUT REGIONAL ECONOMIC DEVELOPMENT STRATEGY (2016)

The annual value of the tourism sector to Tumut has been estimated at \$39 million, with around 300 jobs directly created by tourism activities, and a further 150 jobs indirectly supported. It is estimated that there are around 290,000 domestic visits to Tumut, and 1,800 international visits. Tumut is well-located in relation to the recreational resources of the Snowy Mountains region, including Kosciusko National Park, the water storages associated with the Snowy Hydro Scheme, and Yarrangobilly Caves.

Issues relating to the future of this sector include:

- There is a limited variety of accommodation services and attractions;
- The market is crowded, competitive, and costly;
- There is limited understanding of strategic destination marketing within the Shire, leading to some conflict between stakeholders, and a competitive rather than collaborative relationship with neighbours.; and

- There should be a focus on unique assets and characteristics that provide opportunities for competitive advantage

Possible future opportunities associated with this sector include:

- Better use of the Visitor Information Centre;
- Establishment of an industry representative organisation;
- An improved relationship with Tourism Snowy Mountains;
- Encouragement of inbound tourist coach operators to the region;
- Investment in upgrades to accommodation and attractions/product by small private operators;
- Further development of Blowering foreshores, to raise level of services offered and increase revenues;
- Possible improvement to the Brindabella Road, to improve road access to and from Canberra;
- Development of educational tourism based on experiences in the forestry and agricultural sectors, and also on indigenous culture; and
- Development of new market niches such as cellar doors, art galleries, and fine dining based on local produce, and new activities such as fishing and bushwalking. An increased focus on local food also offers opportunities for new residents seeking a “lifestyle” productive enterprise, and various agri-tourism activities.

TUMUT SHIRE ECONOMIC PROFILE JUNE 2015

The Tumut economic profile provides a snapshot of the Tumut economy, outlining the importance of timber and horticulture/ agriculture for Tumut. In regard to tourism, the profile recognises the operations associated with Snowy Hydro as an important part of the Tumut Shire economy. Further, the water storages, especially Blowering Dam, provide an important tourism resource for the shire. Bushwalking, horse riding, 4wd, fishing, water sports and camping either in a tent or RV are recognised as popular pursuits in the region. The proximity to the Kosciuszko National Park is also highlighted as a regional strength.

HUME & HOVELL TRACK MOUNTAIN BIKE MASTERPLAN (2017) (UNDERWAY)

TRC are currently working with the Snowy Valleys Council to develop a Mountain Bike Master Plan for a 70 kilometre section of the Hume and Hovell Track between Talbingo and Mannus Lake within the picturesque New South Wales Snowy Mountains Region.

This section of the Hume and Hovell Track provides a link between the towns of Tumut and Tumbarumba and is just one part of the 426km walking trail between Yass and Albury in New South Wales. The track was originally developed in the 1980s and follows the footsteps of Hamilton Hume and William Hovell on their expedition to Port Phillip in 1824.

The Master Plan will provide a clear vision and recommendations for future mountain biking through a practical and useable plan which will include business analysis and prioritised costings for a revamped Hume and Hovell Track. The Master Plan will also provide guidance for the future assessment and planning of other sections of the track.

STUDY OF BRINDABELLA ROAD UPGRADE PROPOSAL (UPDATED 2017)

From the scenario evaluation conducted, it can be concluded that a total cost of around \$25 million could be justified, if increases in safety, and in tourist visitation to the Council area, were to result from the upgrade. It is recommended that further studies should be conducted in order to obtain better data, including traffic counts, combined with interviews, to identify current “tourism” use of the road.

TUMBAFEST 5 YEAR STRATEGIC PLAN 2018-2022 (2017)

The vision of the Tumbafest is:

To position Tumbafest as a fun and entertaining festival which celebrates the best of Tumbarumba, attracts visitors and showcases the local region.

The festival has developed diverse sources of income, including ticket sales, festival merchandise, craft and food stalls, a wine and beer tent and government funding.

Tumbafest has Site Development Objectives to grow the festival over the following five-year period and includes the following Key Site Development Objectives for Council:

Encourage Council to commit to site improvements that will increase the carrying capacity and flexibility of the site. These might include:

- Creation of a removable section of the oval fencing in order to allow greater and more direct access to the oval.*
- Provision of additional power outlets in order to facilitate additional catering and staging.*

Investigate opportunities for temporary secondary bridge(s) over creek to provide increased capacity and access around the festival site, consideration should also be given to funding opportunities for the project.

COMMUNITY PORTRAIT: SNOWY VALLEYS LGA, ABORIGINAL AFFAIRS NSW

The Community Portrait provides a snapshot of the Aboriginal profile in Snowy Valleys. In 2016 Census, 630 of the 14,395 residents (4.4%) counted in Snowy Valleys said that they had Aboriginal or Torres Strait Islander origins, or both. Of these 97% were Aboriginal.



Source: Snowy Valleys Council, 2018

4. VISITOR EXPERIENCE AND PRODUCT PROFILE

4.1. INTRODUCTION

This section provides an outline of visitor products and experiences in the Snowy Valleys, identifying the existing primary, secondary and emerging strengths of the region, current product gaps, and product development opportunities.

Further detail on product opportunities is identified in the Strategy Section of this report under each Strategic Theme.



Source: Snowy Valleys Council, 2018

4.2. KEY FINDINGS

The diversity of the natural environment and nature experiences on offer in the Snowy Valleys is currently the primary driver of visitation to the region. However, to date, development of supporting infrastructure and products has been limited and could support further enhancement of adventure, sport and recreation product.

Further development and coordination of supporting complementary products across both food and agritourism will enhance the appeal of the Snowy Valleys as a touring and nature-based destination.

Product development related to the existing heritage and historical assets in the region is currently limited with significant opportunities existing for projects which can enhance the visitor experience in the region. Potentially these could include development of educational experiences which provide contemporary interpretation of current assets, food and beverage experiences which leverage from the produce history of the region, and unique products such as the Hume and Hovell Track which combine nature and adventure tourism with the history of the region.

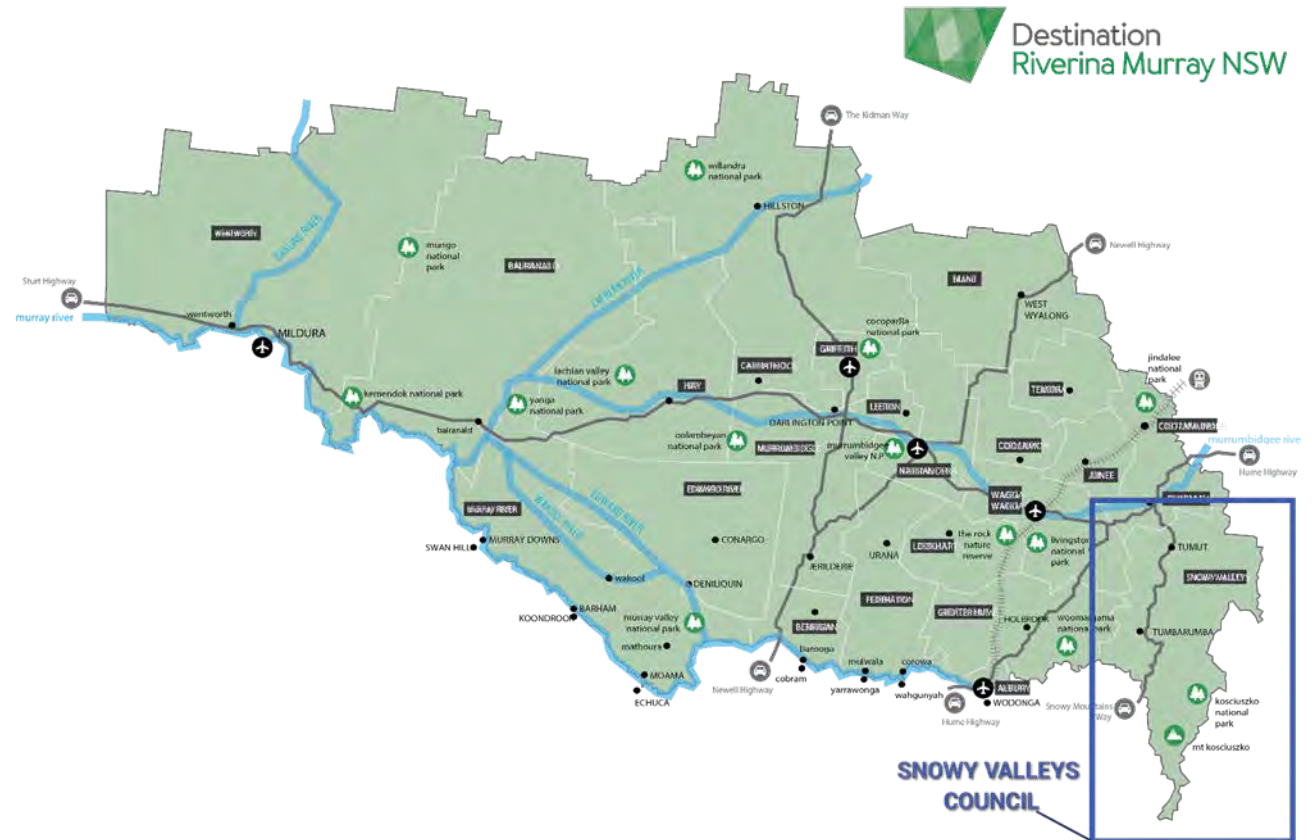
Improved infrastructure, branding and promotion of the Snowy Valleys as a touring region is a key opportunity to attract visitors to the region.

The lack of contemporary and motivating product is a key issue facing the accommodation sector in Snowy Valleys, with both an undersupply of accommodation types such as luxury hotels / resorts, and dated, off-trend existing accommodation establishments.

4.3. REGIONAL CONTEXT

Recently amalgamated Snowy Valleys is also in a period of transition in regards to its regional tourism brand alignment. Recently, NSW has transitioned from a Regional Tourism Organisations structure to a new Destination Networks structure, and in the process Snowy Valleys regional brand alliance has shifted, with its partnership with Tourism Snowy Mountains (TSM) Regional Tourism Organisation ceasing in June 2017, and a new partnership with Destination Riverina Murray beginning in May 2017 (Figure 12). This represents a significant shift for Snowy Valleys, presenting new product development and marketing opportunities for the region.

FIGURE 12 NEW DESTINATION NETWORK ALLIANCE – RIVERINA MURRAY REGION



Source: Destination Riverina Murray, 2018; modified by Urban Enterprise, 2018

4.4. RIVERINA MURRAY PRODUCT STRENGTHS

The Riverina Murray Region DMP currently underway identifies that the region has a number of regional strengths that define perceptions of the tourism product across the whole region. Table 6 illustrates the relative product strengths of each sub-region destination. It identifies that at a regional level, Snowy Valleys has primary product strengths in nature & parks, and rivers & waterways, with history & heritage a secondary strength, and food tourism based emerging strengths (dining & local produce and wine, brewing, distilling).



TABLE 6 EXPERIENCE STRENGTHS

	OUTBACK RIVERINA	CENTRAL MURRAY	WESTERN RIVERINA	EASTERN RIVERINA	ALBURY HUME	SNOWY VALLEYS
Events & Festivals	Secondary	Primary	Secondary	Primary	Primary	
Arts & Culture	Secondary	Emerging	Secondary	Emerging	Primary	
History & Heritage	Primary	Secondary	Primary	Emerging	Secondary	Secondary
Sport & Recreation		Primary	Secondary	Primary	Primary	
Nature & Parks	Primary	Primary	Secondary		Secondary	Primary
Rivers & Waterways	Primary	Primary	Primary	Primary	Primary	Primary
Dining & Local Produce	Secondary	Secondary	Emerging	Secondary	Secondary	Emerging
Wine, Brewing, Distilling		Secondary	Primary	Emerging		Emerging
Business & Conferencing	Emerging	Primary		Secondary	Primary	

Primary
 Secondary
 Emerging

4.5. SNOWY VALLEYS

The Snowy Valleys has existing primary, secondary and/or emerging strengths across the following product categories:

- Nature-based;
- Outdoor adventure, sport and recreation;
- Food and agritourism;
- History and heritage;
- Touring; and
- Events.

An overview of the regions key products and experiences within each category is provided below.

4.5.1. NATURE-BASED

A number of significant national attractions are partly or wholly located within the Snowy Valleys Region. Major natural attractions and assets in the region include.

- An extensive system of waterways which support a number of active and passive recreational uses including Blowering Dam, Tumut River, Paddy's River Dam and Paddy's River Falls, Brungle Creek, Adelong Creek, Talbingo Reservoir, Khancoban Pondage, Tumut Pondage Reservoir, Tumut Two Pondage, Tooma Reservoir, Geehi Reservoir and River, Riverglade Wetlands, and Mannus Lake;
- Kosciuszko National Park – an extensive area of the region is covered by: Kosciuszko National Park (including the summit of Mt Kosciuszko), as well as other national parks including: Clarkes Hill Nature Reserve, Bogandyera Nature Reserve, and Jingellic Nature Reserve;
- Bago State Forest – home to a number of key recreational assets in the region including the Hume and Hovell Track (which passes through Bondo, Micalong, Bago, Mannus and Munderoo State Forests), Blowering Dam Foreshore, Pilot Hill Arboretum, Paddy's River Dam, and the Sugar Pine Walk (a dense copse of

trees planted in 1928 and frequently described as one of the best kept secrets in NSW);

- Yarrangobilly Caves - six caves created from a belt of limestone laid down about 440 million years ago in Kosciuszko National Park, including a River Walk, thermal pool and Yarrangobilly Caves House accommodation;
- A number of great walks through the region, including not only the Hume and Hovell, but also Riverglade Wetlands Walk, Tumut Riverwalk; Four Mile walking track, Kiandra Heritage Trail, and Clarke Gorge track and Nichols Gorge track at Blue Waterholes. In particular access to walking trails is a key attraction for the Khancoban, with the township in close proximity to the Round Mountain Hut; Major Clews Hut and Patons Hut walking tracks;
- An abundance of Australian animals (such as emus, kangaroos, platypus, echidna, great gliders and microbats), as well as unique local species, including over 100 bird species located at the Tumut Wetlands;
- Wild brumbies, which although not an endemic species to the region, are an iconic feature of the wider Australian Alps; and
- An abundance of native flora, including significant areas of rich biodiversity such as those found along Old Tumberumba and Back Kunama Roads.

The region features distinct seasons, each presenting a unique background from which to experience the region's many natural assets

Many of these experiences are, or have been, heavily dependent on the industrial activity in the region, with existing industries such as the Forest Corporation and Snowy Hydro key stakeholders in the tourism future of the region.

ATTRactions OF NATIONAL SIGNIFICANCE

Australian Alps

Parts of Snowy Valleys Council are located within the larger Australian Alps region, one of four identified “National Landscapes” within NSW and recognised by the World Conservation Union as one of 167 world centres of biodiversity (Figure 13). The region acts as the western gateway to the Australian Alps, including Mount Kosciuszko National Park, as well as the Selwyn and Thredbo Ski Fields.

The Snowy Valleys region is one of the most scenic gateways into the Australian Alps, with many of the tourism products and experiences that span the Snowy Valleys region having close links to the Australian Alps, which provide a scenic backdrop of grand vistas, walks and touring routes. The Alps feed the region’s rivers and lakes that in turn provide a rich agricultural landscape. Popular activities across the region include camping, fishing and water-based recreation, bush walking, cycling and motor touring.

Kosciuszko National Park (KNP)

An extensive area of the Snowy Valleys region is covered by KNP (including the summit of Mt Kosciuszko), with KNP encompassing 673,542 hectares of the 1.6 million ha chain of national parks and reserves across the Australian Alps. Established in September 1943, the park is the largest in New South Wales, and is considered nationally significant in terms of its tourism and recreational values. It houses the only alpine resorts in the state and is managed by NSW National Parks and Wildlife Service. Most visitor facilities within the park are concentrated along the defined Major and Minor Road Corridors and Visitor Services Zone. The park is also located within the jurisdiction of five local Aboriginal Land Councils.

FIGURE 13 NATIONALLY SIGNIFICANT LANDSCAPES WITHIN AUSTRALIA



Source: Australian Government Dept. of the Environment & Energy

The diversity of the natural environment and experiences on offer in the Snowy Valleys is currently the primary driver of visitation to the region. However, to date, development of supporting infrastructure and products has been limited and could support further development of adventure, sport and recreation product.

4.5.2. OUTDOOR ADVENTURE, SPORT AND RECREATION

Outdoor adventure, sport and recreational experiences are crucial to the product profile of the region, including bush walking, hiking, horse-riding, horse racing, hang gliding, rock climbing, caving, golf, snow skiing, and camping as well as water based recreation such as boating, swimming, fishing and watersports.

CYCLING

Cycling in particular is an emerging trend in the region, including identified strengths in road cycling, emerging MTB, and the region now home to the first Rail Trail development in NSW (Tumbarumba to Rosewood), with another currently in the discussion stages (Tumut to Batlow). Redevelopment of the Hume & Hovell Track also presents an opportunity to create a unique mountain biking attraction for the Snowy Valleys region.

EQUINE

The Snowy Valleys also has a rich equine history, with the wider Snowy Mountains region strongly linked to the 'Man from Snowy River' narrative. This equine history is also showcased through attractions such as the Boggy Creek Shows attraction in Tumbarumba. There are currently in excess of 50 equine events held in the region annually, including significant annual events, rodeo camps and competition rounds.



4.5.3. FOOD AND AGRITOURISM

Food and agritourism is an emerging strength of the Snowy Valleys region, with the climate of the area and four distinct seasons supporting a diverse range of local produce.

Current local produce businesses and agritourism products and experiences in the region (ranging from wholesale to direct to the public) include:

- Batlow Bees & Berries, Batlow Fruit & Veg, Wilgro Orchard, Mouat's Farm, Batlow Organic Harvest, Happy Wombat Hazelnuts, Sweetie Pie, Batlow Grand Oak Trufferies and Yarra Farm in Batlow;
- Highfield Farm & Woodland and Stella-Rossa, Bread & Pasta Naturally in Adelong;
- Tumbarumba Free Range Eggs and Jolly Berries in Tumbarumba
- Laurel Hill Berry Farm and Asgard Nursery in Laurel Hill
- Tumut River Market Gardens, and
- The Apple Shed in Bombowlee, Birdsong Tweets in Grahamstown, and Snowy Mountains Trout in Blowering.

Both Batlow and Tumut have also developed farm gate trails incorporating some of their existing produce experiences, although each currently includes two operators only.

There are also a number of food and beverage experiences in the region, with beverage production currently the primary strength, including a new brewery (Tumut River Brewing Co), and two cider manufacturers (Batlow Cider and The Apple Thief). Nest Cinema and Café in Tumbarumba and the Coffee Pedlar in Tumut are recent examples of successful food businesses in the region. A monthly local produce and Handmade Market is also held at Nest Cinema and Café.

WINERIES

A cool climate wine growing area, the Tumbarumba wine region currently has 330 hectares of vineyard plantings with an annual crush of approximately 3000 tonnes.

Home to award-winning Courabyra Wines and well-established Tumbarumba Wines Escape, other wineries in the region include Johansen Wines, Obsession Wines, Mount Tumbarumba Wines, and Excelsior Peak, who offer complementary cellar door, tastings and/or food offerings, varying in sophistication (Table 7).

The region's broad acre industrial farming is still predominant, with the majority of grapes produced sold directly to major wine companies with few boutique or intimate cellar door offers.

TABLE 7 SNOWY VALLEYS WINERY FACILITIES

	# WINERIES
Cellar Door	2
Restaurant/Café	2
Function Space	2
Accommodation	1
Total Wineries*	7

There is significant opportunity for the region to establish itself as a hub for production of speciality local produce, supported by the distinct advantages of its geographical location. Further development and coordination of supporting complementary products across both food and agritourism will enhance the appeal of the Snowy Valleys as a touring and nature-based destination.

4.5.1. HISTORY AND HERITAGE

The region has significant history and heritage assets, including diverse historic towns and villages, industry infrastructure and facilities, heritage goldfields and walks, and a strong Indigenous cultural presence.

The region is home to a number of significant heritage attractions, including State Heritage Register listed Bundian Way, Adelong Falls Gold Workings/Reserve, Junction Bridge, Montreal Community Theatre and Moveable Heritage Collection, and Tumut Railway Station Group. It is also home to Cabramurra, a unique Alpine community once home to nearly 2,000 workers as part of the Snowy Hydro Scheme (but which no longer has a permanent resident population) as well as to a number of historic milestones including being the birthplace (Talbingo) of the celebrated Australian Author Miles Franklin, and having the water speed record set by Ken Warby on Blowering Dam in 1978.



Cabramurra township

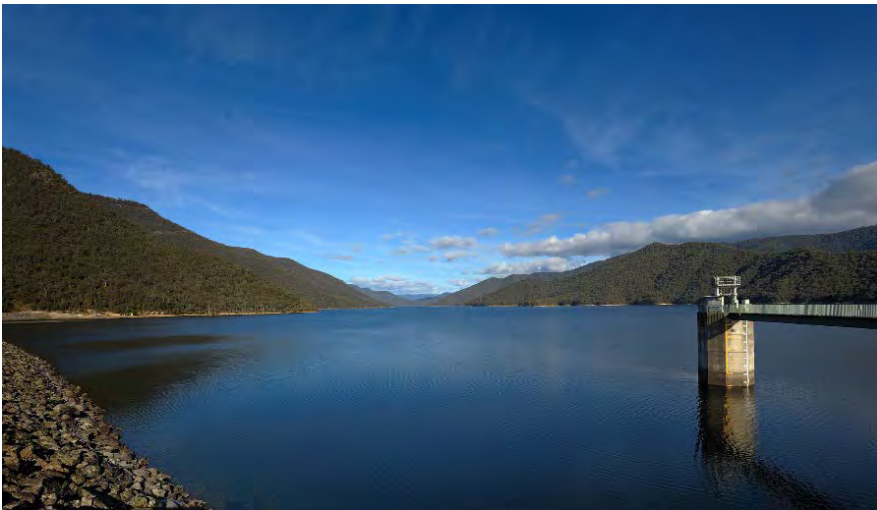
Source: ABC News (via Helen Waddington) 2017

INDUSTRY

The region has significant industry infrastructure and facilities (both historical and currently operational) that have shaped the region, including the Batlow Packing House Co-operative, Visy, and the Snowy Hydro Scheme.

Snowy Hydro Scheme

The development of the Snowy Mountains Hydro Electric Scheme was the biggest civil engineering project in Australia's history. It is believed to have helped unify the region, changing topographical features and creating new towns like Cabramurra, and creating large reservoirs of water such as Blowering Dam. A number of assets are located within the region, and present significant opportunity to support product development.



Source: Snowy Valleys Council, 2018

GOLD RUSH ERA

The Snowy Valleys retains some significant gold rush era heritage architecture in towns such as Tumut and Adelong, including the Adelong Falls Gold Mill Ruins, and

on a subregional level, Tumbarumba is recognised as an area with rich gold mining heritage.



Source: Snowy Valleys Council, 2018

INDIGENOUS

Both the Tumut and Tumbarumba subregions have strong Indigenous history. Tumut is marked as the boundary of three separate aboriginal tribes and is identified as a great place to learn more about the Indigenous culture of the local Wiradjuri and Walgalu people, including through the [Wiradjuri Wonders](#) Aboriginal Discovery Tours. In Tumbarumba, the Visitor Information Centre and Museum features an aboriginal heritage display including the unique Mundaroo Coolamon.

Product development related to the existing heritage and historical assets in the region is currently limited with significant opportunities existing for projects which can enhance the visitor experience in the region. Potentially these could include development of educational experiences which provide contemporary interpretation of current assets, food and beverage experiences which leverage from the produce history of the region, and unique products such as the Hume and Hovell Track which combine nature and adventure tourism with the history of the region.

4.5.2. TOURING

The Snowy Valleys is also a popular touring region, particularly for motorcyclists. A key attraction is the Snowy Valleys Way Touring Route, of which Snowy Valleys Council comprises one of three remaining member Councils encompassing the Snowy Valleys Way Project Management Team (the other two being Cootamundra-Gundagai and Towong). Brindabella Road, which links Tumut to Canberra, presents a significant opportunity to increase the touring strength of the region if sealed.

The region includes a number of 4WD routes and experiences within the Australian Alps landscape, including The Ravine (formerly known as Lob's Hole), Manjar and Black Jack fire trails, and Port Phillip Fire Trail.

Improved infrastructure, branding and promotion of the Snowy Valleys as a touring region is a key opportunity to attract visitors to the region.

4.5.3. FESTIVALS AND EVENTS

A total of 88 events were hosted in the Snowy Valleys region in 2017, as well as a number of community and youth programs, and workshops. By township, Tumut was the primary hub for events, hosting 36 events throughout the year, with Tumbarumba having the second highest share with 19 followed by Batlow with 8 events.

Family and lifestyle (29 events) and sport and recreation (21 events) were the top event types for the region, including the Hume & Hovell Ultra which is an example of a sporting event for the region which effectively utilises the unique natural environment and history of the region.

Whilst only five events (including Batlow Cider Fest and Tumbarumba Tastebuds) were classified primarily as food and wine events, and a number of other iconic events in the region have a core focus on local produce including Tumbafest and Batlow Apple Blossom Festival.



Tumbafest 2018

Source: Snowy Valleys Council, 2018

4.5.4. ACCOMMODATION

An audit identified an estimated 74 accommodation providers within the key townships of the Snowy Valleys, with a total capacity of approximately 2,986 bedspaces across the region (Table 8 overleaf).

Caravan cabin & camping sites are the largest accommodation type across the region, accounting for 45% of total bedspaces, followed by hotels and motels (both 21%).

As the hub of the region, Tumut has the largest concentration of accommodation with 27 properties accounting for 41% of bedspaces, followed by Khancoban (including Tooma) with 15%, Batlow (including Laurel Hill) with 13%, Tumbarumba (including Jingellic/Rosewood) with 13%, Talbingo (11%) and Adelong (7%).

The region as a whole has a high proportion of free camping sites which are not accounted for within the audit.

TABLE 8 ACCOMMODATION PROVIDERS (AND BEDSPACES) BY KEY TOWNSHIPS AND SURROUNDS

TOWNSHIP	HOTEL	MOTEL	BNB, FARMSTAY	CARAVAN CABIN AND CAMPING	SELF-CONTAINED
Adelong	Adelong Middle Hotel (18) Royal Hotel Adelong (16) Beaufort House (60)		Chatham Cottage B&B (4)	Golden Gully Caravan Park (100)	Moorallie Cottage & Tracton Homestead (13)
Batlow (inc. Laurel Hill)	Batlow Hotel (11) The Wakehurst Hostel (-) Laurel Hill Forest Lodge (160)	The Apple Inn (36)	Brindabella Farmstay (6)	Batlow Caravan Park (100)	Batlow House Serviced Accommodation (6)
Khancoban & Tooma		Alpine Inn Khancoban (96)	Brigham House (8)	Khancoban Lakeside Caravan Park (219)	Verandah Camp Holiday Lodge (6) Coban House (5) Jagumba (4) Fairview (4) Khancoban Holiday House (8) Queens Cottage (56) Khancoban Rose Holiday Units (22) Cossetini High Country Retreat (4) The A Frame House (4)
Talbingo		Talbingo Country Club & Motel (24) Talbingo Mountain Retreat (65)		Talbingo Caravan & Tourist Park (198)	Gills & Spills Talbingo Cottage (9) Mountain Lake Holiday Home (6) Mountain View Cottage (8) Stella's (12) Stollburg Cottage (6) Drift Inn (8) Hudson Cottage (6)
Tumbarumba (inc. Jingellic/Rosewood)	The Union Hotel (46) Tumbarumba Hotel (34) Bridge Hotel (inc. caravan/camping) (50)	Tumbarumba Motel & Elms Restaurant (93) Club Motel Tumbarumba (32)		Tumbarumba Creek Caravan Park (100) 4 Bears Café (12)	Paddys River Cottage Retreat (7) Magenta Cottage Accommodation & Art Studio (8) Mannus Valley B&B (2) Honeysuckle Cottage (6) Rosewood Golf Club (-)
Tumut	Commercial Hotel (21) Star Hotel (20) Royal Hotel Motel (19) Woolpack Hotel (11)	Amaroo Motel (84) Ashton Townhouse Motel & Suites (96) Best Western Motel Farrington (78) Country Comfort Tumut Valley Motel (16) Elms Motor Inn (11)	Burrangojoey B&B Country Retreat (6)	Blowering Holiday Park (69) Camp Hudson (32) Goobragandra Homestead (15)	Nimbo Fork Lodge (20) Ribbonwood Cottages (15) Tumut Apartments (24) Tumut Log Cabins (20) Brindabella Station (12) Elm Grove Mountain Retreat (8)

		Merivale Motel (22) Sefton House (15) Tumut Motor Inn (57)		Little River Log Cabins (18) Riverglade Caravan Park (494)	Elm Cottage (26) Russellee Bed & Breakfast (15) The Monarch (6)
--	--	--	--	---	---

A number of these properties are also listed on AirBnB

AIRBNB

AirDNA recorded 54 active Airbnb rentals for Snowy Valleys, which has grown by 74% since 2014. Across these 54 rentals:

- The average daily rate was \$143;
- 70% were entire homes and 30% private rooms;
- 39% were three bedroom homes;
- 47% were available year round; and
- The occupancy rate across the region was 48%.

Overall there were 34 active hosts across the region, with 52% of these multi listing hosts and 48% single listing. Table 9 provides a breakdown of available properties by township.

TABLE 9 AIRBNB PROPERTY CHARACTERISTICS BY TOWNSHIP

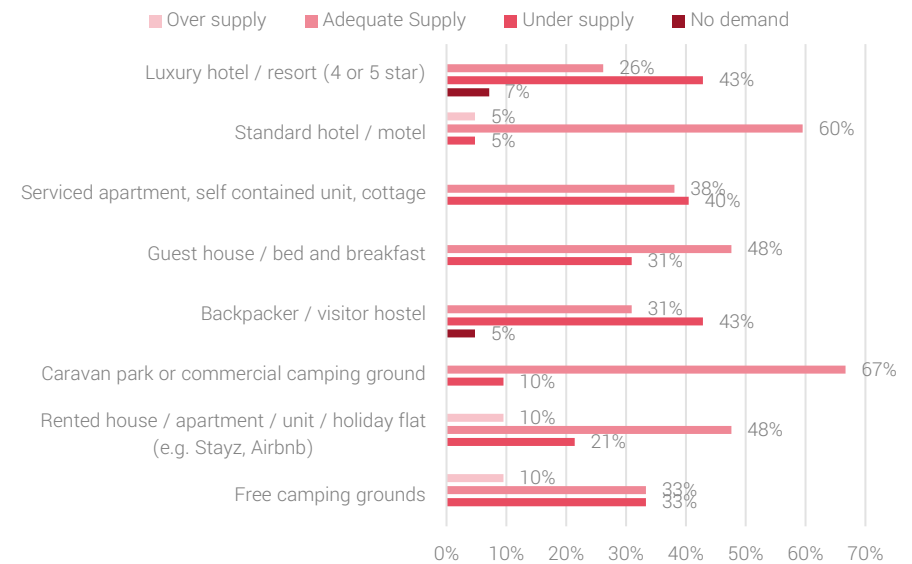
	ENTIRE HOMES	PRIVATE ROOMS	AVERAGE DAILY RATE	OCCUPANCY RATE	% AVAILABLE FULL TIME	# OF HOSTS
Adelong	3	6	\$117	9%	0%	4
Batlow	1	0	\$300	NA	NA	1
Bombowlee	3	1	\$183	17%	33%	2
Bombowlee Creek	0	1	\$69	NA	na	1
Brindabella	1	0	\$244	NA	NA	1
Brungle	1	2	\$164	NA	NA	3
Khancoban	5	1	\$124	61%	40%	2
Little River	7	0	\$252	54%	71%	3
Mundongo	1	0	\$141	na	NA	1
Paddys River	1	0	\$102	NA	NA	1
Talbingo	8	0	\$152	51%	40%	8
Tooma	0	1	\$127	NA	NA	1
Tumut	3	4	\$145	9%	66%	4
Tumut surrounds	2	0	\$91	NA	NA	2
Wondalga	2	0	\$128	NA	NA	2

ACCOMMODATION SUPPLY

Within the business survey conducted, respondents identified their perception of supply and demand in the region across a range of accommodation types (Figure 14). A number of accommodation types were identified as being under supplied in the region, with the most common:

- Backpacker / visitor hostel (43% of respondents);
- 4 or 5 star luxury hotel / resort (43% of respondents); and
- Serviced apartment, self contained unit, cottage (40% of respondents).

FIGURE 14 PERCEPTION OF ACCOMMODATION SUPPLY BY TYPE

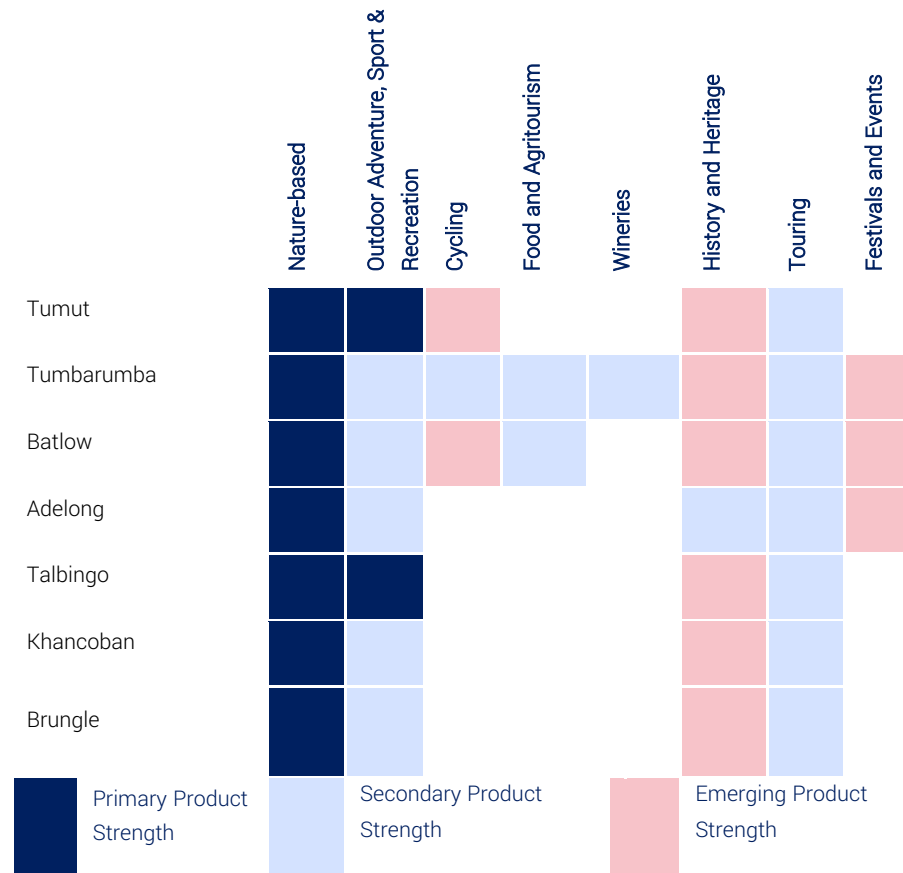


The lack of contemporary and motivating product is key issue facing the accommodation sector in Snowy Valleys, with both an undersupply of accommodation types such as luxury hotels / resorts, and dated, off-trend existing accommodation establishments.

4.5.5. TOWNSHIP STRENGTHS

Figure 15 shows an assessment of Snowy Valleys regional product strengths by key townships.

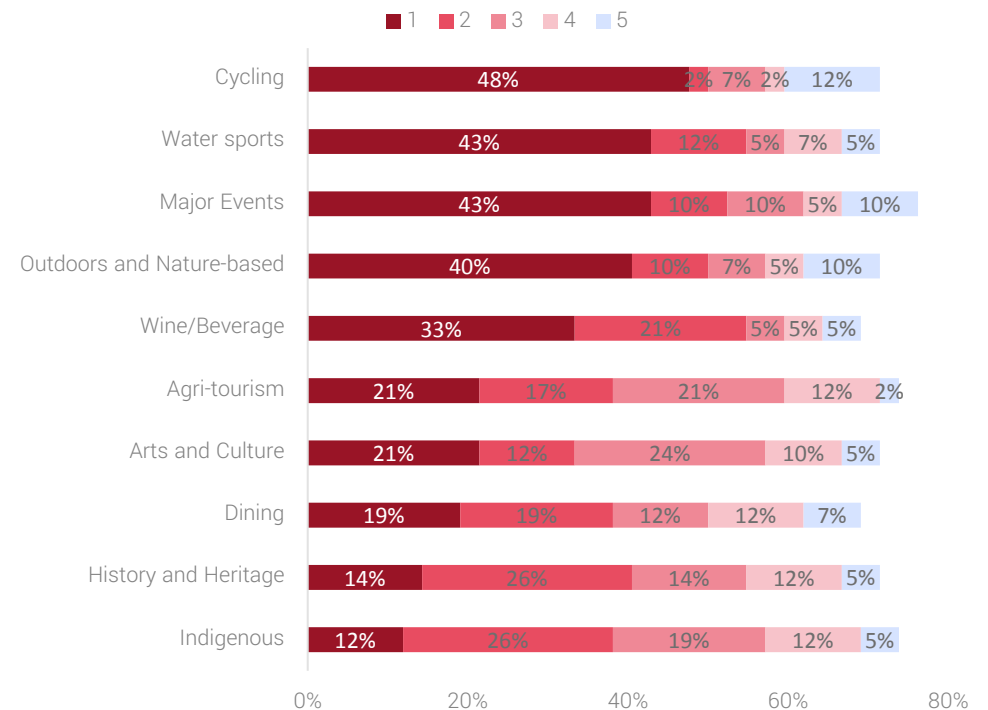
FIGURE 15 PRODUCT STRENGTHS OF SNOWY VALLEYS TOWNSHIP REGIONS



4.5.6. PRODUCT DEVELOPMENT

Within the business survey, respondents also identified the tourism experiences which they thought could provide the greatest benefit to tourism in the Snowy Valleys if developed (Figure 16). Almost half (48%) of all respondents identified cycling as one of the tourism experiences that could have the greatest benefit in the region if developed, along with water sports (43%), major events (43%) and outdoors and nature-based experiences (40%).

FIGURE 16 GREATEST BENEFIT TOURISM EXPERIENCES (1=GREATEST BENEFIT)



* graph does not include non-responses

5. GOVERNANCE AND RESOURCES

5.1. INTRODUCTION

This section provides an overview of governance and resources dedicated to tourism service delivery in Snowy Valleys. This provides a snapshot of analysis and further information is included in the Background Paper.

5.2. KEY FINDINGS

The Snowy Valleys Strategy and Place Unit has a total of 10 full time, and 5 part time (4 staff fulfilling 2 full time positions, and one 0.6 FTE role) (Figure 16). Within this unit are the following staff resources dedicated to tourism:

- Coordinator Tourism and Economic Development (1FTE)
- Tourism Promotions Officer (1FTE)
- Tourism and Marketing Officer (1FTE-Vacant);
- VIC Assistants (1FTE).

The overall tourism budget is estimated at \$674,700. Of importance to note is the very low allowance dedicated to marketing – around \$56,100, compared to \$348,900 dedicated to Visitor Information Centres.

Many other Councils across Australia have similar legacies with disproportionate expenditure on Visitor Information Centres.

Moving forward Snowy Valleys Council should focus further on areas which will attract visitation, this includes:

- A greater focus on digital marketing and social media – A dedicated resource in this area could also be used to support information services content; and
- Greater focus on industry development and product development – including advocacy for investment and promotion of investment opportunities.



Goobarragandra River

Source: Snowy Valleys Council, 2018

5.3. OVERVIEW OF TOURISM SERVICE DELIVERY

5.3.1. TOURISM GOVERNANCE HIERARCHY

The delivery of tourism in the Snowy Valleys includes the following organisations:

- Destination NSW;
- Destination Riverina Murray;
- Snowy Valleys Council; and
- Township based LTAs (e.g. Visit Tumut, Tumbarumba Region).

The roles and responsibilities vary for each organisation. The role for Local Government in tourism service delivery often includes the following:

- Delivery of visitor information services;
- Industry support;
- Domestic marketing;
- Content development;
- Event attraction and operation; and
- Investment attraction.

Following the recent transition of NSW from a Regional Tourism Organisations structure to a new Destination Networks structure, Snowy Valleys is now aligned with Destination Riverina Murray. This organisation is well resourced and provides leadership across the broader region with regard to:

- Marketing;
- Product development;
- Digital resources; and
- Industry development.

There is opportunity for Snowy Valleys to continue to work closely with Destination Riverina Murray, particularly in the areas of marketing, product development and product-based industry development.

5.3.2. SNOWY VALLEYS -STRATEGY AND PLACE UNIT

The Snowy Valleys Strategy and Place Unit has a total of 10 full time, and 5 part time (4 staff fulfilling 2 full time positions, and one 0.6 FTE role) (Figure 17). Within this unit are the following staff resources dedicated to tourism:

- Coordinator Tourism and Economic Development (1FTE)
- Tourism Promotions Officer (1FTE)
- Tourism and Marketing Officer (1FTE-Vacant);
- VIC Assistants (1FTE).

Based on the above there and considering that the coordinator role is split between economic development and tourism there are 3.5 staff dedicated to tourism services in Snowy Valleys.

The gaps in the tourism staff resourcing based on other successful models are:

- **A VIC coordinator to act across the entire Snowy Valleys. This will ensure that information services are delivered in a coordinated and consistent approach;**
- **Digital and social media. This needs to be a key focus for the marketing officer and could potential be a role on its own, particularly a focus on content development for social media and visitor information.**
- **Tourism events facilitation. An important way to grow tourism is through the facilitation and attraction of events that grow tourism and strengthen brand awareness.**
- **Product and industry development. The region needs to have a strong focus on product and industry development to grow tourism experience and yield in the region.**

FIGURE 17 SNOWY VALLEYS TOURISM UNIT STRUCTURE



Source: Snowy Valleys Council 2017

5.3.3. BUDGET

The total tourism expenditure for the Snowy Valleys for 2016/17 was \$674,703 based on the total expenditure for the former Tumbarumba and Tumut Shires (Table 10).

TABLE 10 TOTAL TOURISM EXPENDITURE

STREAM	2016/17 EXPENDITURE	% TOTAL EXPENDITURE
Tumut Region Tourism	\$384,807	57%
Tumbarumba Region Tourism	\$289,896	43%
Total Tourism Expenses	\$674,064	100%

Source: Snowy Valleys Council 2018

The Tumut region had a total expenditure of \$384,807 for 2016/2017, which equates to 57% of the combined total tourism expenses for Snowy Valleys. This comprised of the following expenses, as shown in Table 11:

- Salaries and Wages - \$130,000 (including events staff);
- Marketing - \$20,000;
- Memberships - \$30,000 (no longer in operation); and
- Tumut Regional Visitors Centre - \$149,807.

The Tumbarumba region comprised 43% of combined total tourism expenses for Snowy Valleys and these expenses are as follows:

- Salaries and Wages - \$172,269 (VIC staff);
- Marketing (brochures, promotional material, Snowy Valley Way) - \$36,102;
- Memberships - \$28,750;
- VIC operating expenses (building maintenance, utilities, training, mowing and other) - \$26,775; and
- Events (sponsorship, cash contributions, and funding pool)- \$26,000.

TABLE 11 TOURISM EXPENDITURE BY REGION, 2016/2017

EXPENSE	TUMUT REGION TOURISM	TUMBARUMBA REGION TOURISM	Total	%
Marketing	\$20,000	\$36,102	\$56,102	8%
Memberships	\$30,000	\$28,750	\$58,750	9%
VIC (including salaries for Tumbarumba)	\$149,807	\$199,044 (\$197,084 for Tumbarumba VIC + \$1,960 for maintenance at Khancoban Visitor Centre)	\$348,851	52%
Events	\$80,000	\$26,000	\$106,000	16%
Other Salaries & expenses	\$105,000	-	\$105,000	16%
<i>Salaries & Wages Total</i>	<i>\$130,000</i>	<i>\$172,269</i>	<i>\$302,269</i>	<i>45%</i>
Total Tourism Expenses	\$384,807	\$289,896	\$674,703	100%

Source: Snowy Valleys Council 2018

For the combined regions, 45% of the total expenditure on tourism is for salaries and wages (including for VIC and events staff). VIC expenses specifically account for 52% of the total expenditure (including staff salaries and wages). It should be noted that a significant share of the operational costs of the Tumut VIC are borne by the NSW National Parks and Wildlife Service, resulting in the total cost to run the Tumut VIC (\$449,718) being significantly higher than the Tumbarumba VIC (\$197,084).

Memberships account for 9% of the total expenditure, however, as Tourism Snowy Mountains no longer exists this money will be redirected to regional tourism development in the future.

It should be noted that the majority of the events supported by the former Tumut Community and Cultural Development team (16% of total tourism expenditure including events salaries and wages) are community events with the exception of Ciderfest in Batlow. The former Tumbarumba Shire provided direct funding through a grants program and cash sponsorship to Tumbafest and Tumbarumba Tastebuds events.

Snowy Valleys Council does not currently provide specific event funding, instead providing events assistance through their events officer and other in-kind assistance such as road closures. The events officer provides support to events committees in relation to their risk assessment, promotion, load in and load out, and applying for grant funding. The Tumbarumba Tourism Promotions Officer, who currently manages the Tumbarumba VIC, also provides assistance for events.

5.4. VISITOR INFORMATION SERVICES

The former Tumut and Tumbarumba Shires provided funding to a variety of tourism bodies for development and promotion on a regional level. This included supporting the operation of two Visitor Information Centres in the region (Tumut Region Visitor Centre and Tumbarumba Visitor Information Centre), as well as providing maintenance support for the Khancoban Visitor Centre, and ancillary visitor and operational services such as the Tumut Region Visitor Centre Advisory Committee (TRVCAC) and Tumbarumba Shire Tourism Advisory Committee.

A separate detailed review of existing funding, partnerships and operational models will accompany the development of this Destination Management Plan to maximise efficiency and benefit for the new Snowy Valleys Council into the future.

5.5. TOURISM EVENTS

Snowy Valleys Council provides support to events which deliver a substantial economic impact for the region. This will be on a short-term basis for one-off events and on a medium to long term basis for regular or annual events. The following criteria forms the basis of Council's consideration for potential support of tourism events.

ECONOMIC IMPACT

This is the ability of an event to drive new spend in the Snowy Valleys, key factors assessed are:

- The anticipated number of regional and interstate participants and/or other visitors who will travel specifically for the event;
- Their average length of stay; and
- Their estimated daily expenditure.

MARKETING IMPACT

This refers to the event's effectiveness in driving marketing outcomes for the Snowy Valleys region including, but not limited to:

- What the event says about the Snowy Valleys region and the community hosting the event;
- How the event enhances the Snowy Valleys brand and increases awareness of the region as a tourism destination; and
- The nature and size of the event audience.

STRATEGIC ALIGNMENT

In addition to the economic and marketing impact, Council encourages the inception of new and development of existing events that are consistent with the following themes:

- Nature based (e.g. fishing, hiking/walking);
- Heritage and Culture (e.g. Indigenous experiences);
- Cycling (e.g. mountain biking, road cycling); and
- Food & Agritourism (e.g. local produce, farm experiences, wineries, breweries)

Other considerations may include the event organiser's ability to demonstrate the financial viability of the event and consideration in relation to the scheduling of the event i.e. peak or off peak times.

For more information about events, please also refer to Council's Events Policy.



6. SWOT ANALYSIS

Table 12 provides a summary of key identified strengths, weaknesses, opportunities and threats for the Snowy Valleys region, as identified through background research and consultation.

TABLE 12 IDENTIFIED STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS FOR THE SNOWY VALLEYS TOURISM INDUSTRY

STRENGTHS	<ul style="list-style-type: none"> • Very high quality natural landscape, including assets of national significance (e.g. KNP), and a range of other national/state forests • High sports and recreation participation in the region; including equine, and cycling as an emerging strength; • Strong indigenous cultural connection particularly in Tumut and Brungle, with 4.4% of the Snowy Valleys population also having indigenous heritage; • A range of Snowy Hydro assets in the region which provide a visual history of Australian engineering, and also provide recreational opportunities for the community as well as visitors including boating, fishing and swimming; • Prominence of Snowy Hydro in the tourism sector, including providing sponsorship of community events and operating two tourism assets in the region which each attract visitors: Murray 2 visitor centre (whilst Murray 1 is upgraded) and a display area in Talbingo’s main shopping precinct (which is currently being upgraded with new displays, information and interactive opportunities); • Diverse waterway assets which provide conditions for a range of recreational uses; • Low level of light pollution; • Proximity of Tumut river to Tumut township; • Industry assets – Forestry etc; • Proximity to the NSW ski fields; • Strong arts and cultural history (e.g. birthplace of author Miles Franklin); • Distinct and diverse Australian and local fauna including those unique to the region; • Diverse range of produce due to geographic landscape and climate; • Number of unique and popular events; • Strong history and heritage assets in the region, including a series of unique and historic townships and prominent goldrush era attractions (Adelong Creek Falls Gold Ruins); • Wine production in Tumbarumba; • Mountainous vistas and natural beauty; • Emerging strengths are as a boutique produce and beverage region;
-----------	---

	<ul style="list-style-type: none"> • Emerging passionate local producers (e.g. Tumut River Brewing Co) and food and beverage business owners (e.g. Nest Café and Cinema, Coffee Pedaler) • Established local produce strengths of the region (e.g. Batlow apples and cider), and businesses which are wanting to leverage from the visitor economy to create contemporary experiences (e.g. Cider Thief and Wilgro Orchards); • Emerging arts and culture products and events to support heritage and history visitors –e.g. Tumut Labyrinth, Woodland Film Festival, Nest cinema and café; and • Clean, fresh environment which lends itself to wellness industry developments and marketing.
WEAKNESSES	<ul style="list-style-type: none"> • Although Natural landscape is a tremendous strength of the region, awareness of the region and its assets are a key weakness; • Current outside awareness of indigenous history and connection to it is limited; • Distance from key visitor markets of Melbourne and Sydney; • Accommodation stock is dated and off trend; • Food and beverage product is dated and off trend; • Caravan parks provide the bulk of accommodation, but require improvement; • Food and beverage offering in the key township of Tumut is very limited (with the exception of new businesses The Coffee Pedaler and Tumut River Brewing Co); • Low community sentiment for Council in the wake of Council amalgamation and previous unactioned strategies; • Separation of Tumut and Tumbarumba subregions; • Regional promotion and awareness; • A large proportion of visitors are from lower yield markets (e.g. family visitors) attracted to free recreational activities and accommodation within the region; • Lack of / or condition of supporting infrastructure at key recreational assets; • Lack of quality restaurants, cellar door experiences and luxury accommodation; • Limited development of ancillary products and attractions to support visitation to the natural assets of the region; • Product development related to the existing heritage and historical assets in the region is limited; • Lack of / or effectiveness of signage and wayfinding throughout the region (e.g. Batlow directional signs on the approach from Melbourne, misinformation and missing signs in Khancoban) • Limited business trading hours (particularly an issue on weekends and public holidays) • Lack of regional identity in comparison to promotion of other natural asset-rich regions such as the Blue Mountains, and the Barossa; • Disengaged accommodation sector;

	<ul style="list-style-type: none"> • Regulatory barriers and delays; • Digital presence; • Public transport; • Public camping area amenities; and • Low share of visitation for the Riverina Murray region but significantly stronger natural assets.
OPPORTUNITIES	<ul style="list-style-type: none"> • Development and promotion of the Tumbarumba wine region, including identifying wineries that can be supported to grow their event offerings and profile; • Optimising the connection between the Tumut River and the Tumut township • Increased development and promotion of the regions touring strengths (including proximity to key thoroughfare from Melbourne to Sydney) • Regional produce in the area provides significant opportunity to develop ancillary agri tourism experiences; • The development of existing and new events creates an opportunity to increase liveability in the region; • Promotion of the distinct unique townships of the region as part of a wider and longer visitor itinerary rather focusing on the Tumut/Tumbarumba subregional divide; • Region has a significant advantage due to its geographical position and climate to tap into the local food tourism trend, particularly paddock to plate; • Development of signature food and wine, and music events (the majority of current events are broader family and lifestyle or sporting events); • The existing diversity of industry assets (snowy hydro, forestry etc) can be utilised to easily develop a strong network of visitor attractions; • First adopter leverage of the Tumbarumba to Rosewood Pilot Rail Trail development presents a key opportunity to position the region as the premier cycling destination for NSW; • Create products and experiences that will attract identified regional potential markets – international experience seekers and millennials/young travellers; • Further development and coordination of regions food and beverage products will enhance the Snowy Valleys as a touring and nature-based destination; • The existing diversity of nature-based attractions on offer could support further development of adventure, sport and recreation product; • Development of educational experiences which provide contemporary interpretation of current assets, and food and beverage experiences which leverage from the produce history of the region; • Increased marketing and promotion of the region; • Whole of region marketing initiatives (e.g. promotional brochure outlining all towns and activities) to support the new Snowy Valleys brand • Transforming the region through big picture thinking and game changing projects – e.g. Brindabella road, NBN and connectivity • Product development to leverage the potential of underutilised townships such as Khancoban, Talbingo

	<ul style="list-style-type: none"> • New regional alliance with Destination Riverina Murray • Federal and state support for the development of authentic aboriginal tourism opportunities • Facilitating indigenous participation in the tourism sector • Accommodation which heroes the natural environment and provides an immersive and unique experience • Supporting regional producers (such as Wilgro orchards) to expand and develop their businesses to leverage from the visitor economy through the creation of farm gate/cellar door experiences, events and other ancillary product offerings (e.g. restaurants/cafes/accommodation) • Development of other ancillary product (such as F & B) that will entice low yield visitors (e.g. families staying in free camping) to visit and spend money in the bigger townships (Tumut, Tumbarumba)
THREATS	<ul style="list-style-type: none"> • Increased competition from other destinations within NSW, Interstate and internationally to attract visitors • Attitude towards tourism in the region is a threat – strong industry focus, key assets reliant on industry direction (e.g. Sugar Pine Walk); existing visitor assets in the region (e.g. accommodation and food) are geared towards industry ‘visitors’ who already provide the necessary occupancy and revenue without the property/business owners needing to meet holiday visitor expectations • Loss of key industrial assets supporting the region’s economy (community threat)

PART B. STRATEGIC PLAN

7. STRATEGIC FRAMEWORK

7.1. INTRODUCTION

The strategic framework provides the overarching approach to strategic tourism development in the Snowy Valleys (Figure 18).

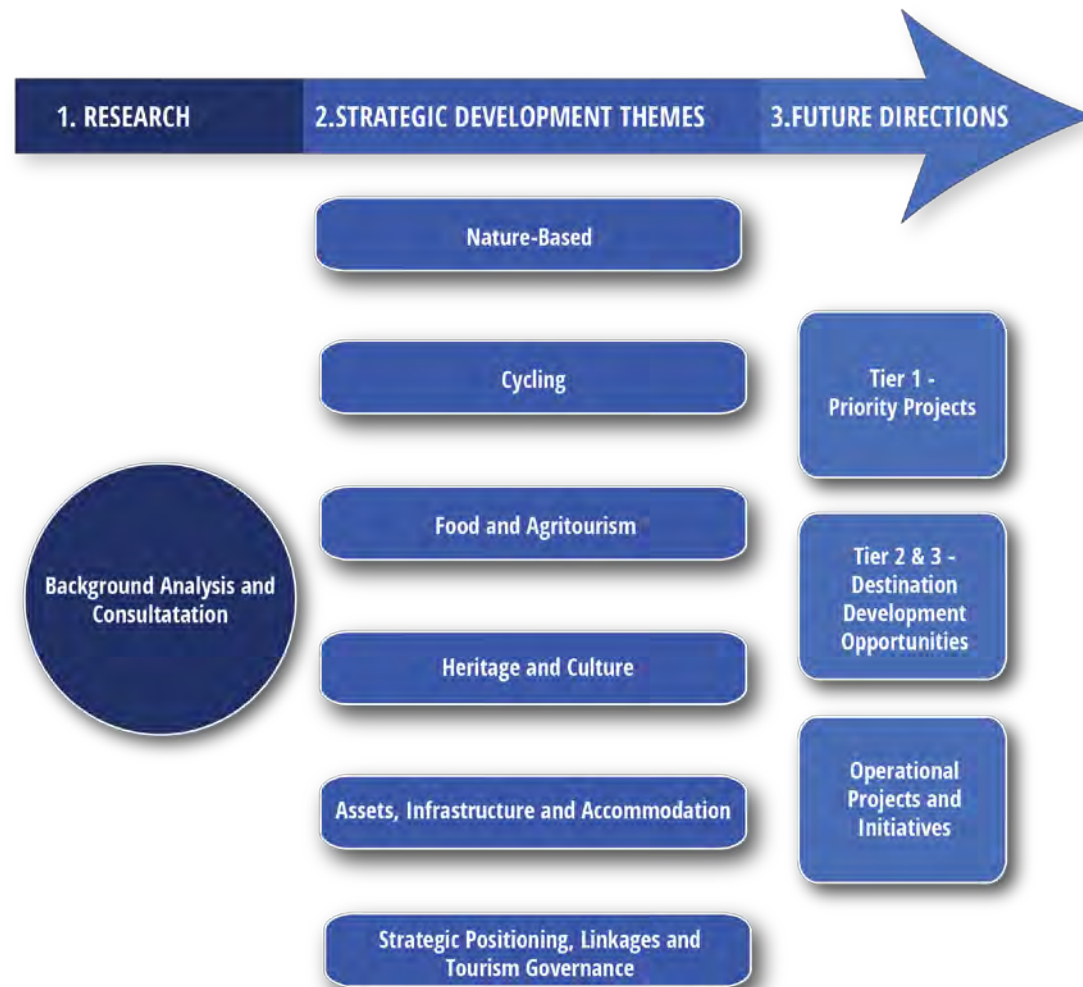
The framework highlights the strategic development themes that provide a focus for future investment and activities within Snowy Valleys

Delivery of the strategy will be through targeted work in attracting investment for priority game changers, private sector and public sector investment in tier 2 and 3 projects and operational projects and initiatives to be delivered by Snowy Valleys Council.

7.2. VISION 2022

Snowy Valleys will be known as the freshwater capital of Australia and a premier cycling destination, with stunning vistas, clean air, premium local food, and an abundance of natural beauty. Snowy Valleys is the ultimate escape for adventurers and quiet seekers alike; with a rich offering of places to explore and connect with the land.

FIGURE 18 STRATEGIC DEVELOPMENT FRAMEWORK



7.3. STRATEGIC THEMES

THEME 1: LEVERAGING FROM ICONIC NATURE ASSETS

The Snowy Valleys region currently has a diverse range of iconic nature assets which are not fully optimised. Sustainable development of the iconic nature assets through creating signature attractions and investing in infrastructure to support recreational use presents a significant opportunity for the region.

Focused investment in river and lake access and Parks related infrastructure identified in this DMP will be important for allowing for additional capacity in the region and also improving visitor experience.

There is also opportunity to investigate private sector investment within or in close proximity to nature assets such as nature-based accommodation, food and beverage investment and tour operators.

THEME 2: CREATING A PREMIER CYCLING DESTINATION

The Snowy Valleys Region has excellent prerequisites for cycle tourism development, this includes:

- Road Cycling - quiet roads and hill climbs to target the recreational cyclist as an alternative destination from Victoria's North East and NSW Snowy Mountains;
- Rail Trails – Disused railway lines traverse the region through highly scenic landscapes and allow villages to be linked. A pilot project is underway which will link Tumbarumba to Rosewood; and
- Mountain Biking – There is a large amount of public forest in close proximity to townships and a growing mountain bike scene in Tumut and Tumbarumba. Further investment is needed to realise this sector. The Hume and Hovell Track may also present an opportunity for a multi-day mountain bike link through the region.

THEME 3: SHOWCASING REGIONAL PRODUCE THROUGH CONTEMPORARY FOOD AND AGRITOURISM EXPERIENCES

The region has strong agri-tourism credentials through wine and cider and craft beer production, however the experience of local commodities is limited.

Visitation data shows a low level of dining activity when benchmarked against other destinations.

There is a need for Council to facilitate and support private sector investment in dining, agritourism and beverage experiences. This is critical for facilitating yield in tourism and also in attracting new and contemporary visitor markets.

THEME 4: INTERPRETATION AND DEVELOPMENT OF EXISTING HERITAGE AND CULTURAL ASSETS AND NARRATIVES

The Snowy Valleys region is rich in existing heritage and culture assets, and diverse historical narratives which are currently underdeveloped, with limited awareness outside of the region.

There is opportunity to improve the interpretation of existing heritage and cultural assets, as well as to develop attractions which leverage from the history of the region, particularly those which have strong synergies with other identified themes, including Nature-based and Food and agritourism.

THEME 5: REVITALISING ASSETS, INFRASTRUCTURE AND ACCOMMODATION

Visitation projections for the Riverina Murray Region show strong growth over the next 10 years. In NSW there is projected growth in key domestic and international markets.

Investment in public assets and accommodation is required to boost supply of infrastructure that can support tourism.

In addition, improvements to township amenity will go a long way to supporting tourism, particularly with improvements and connection with riverfront areas and delivering vibrant townships.

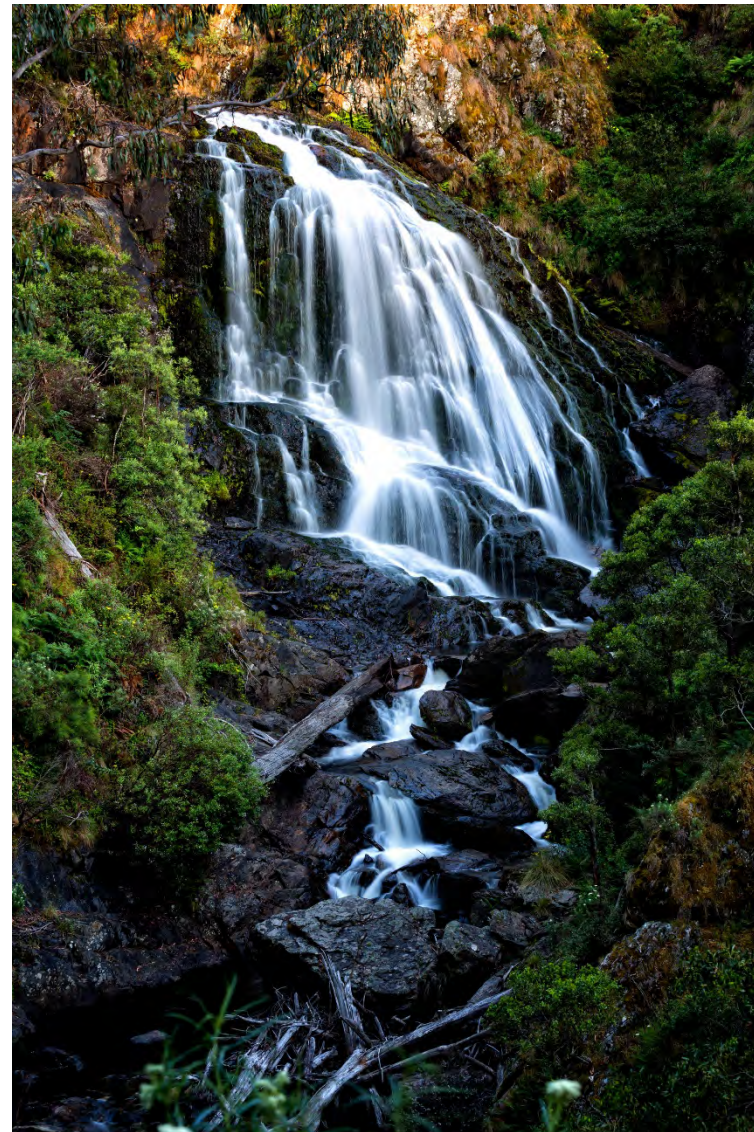
THEME 6: MAXIMISING STRATEGIC POSITIONING, LINKAGES AND TOURISM GOVERNANCE

For the region to strengthen itself as a destination, a unified and collaborative approach is essential. Pooling of resources with regard to investment, product development, marketing and visitor information services is required.

There are limited resources dedicated to marketing the Snowy Valleys and its destinations to external markets. The plan needs to deliver a much greater focus on external marketing and leverage greater benefits from digital and social media.

It is not often that Council areas are utilised as a tourism brand, however in the case of the Snowy Valleys there is opportunity for an overarching regional destination brand that sits above Tumut, Tumbarumba and other destinations.

Future growth of tourism should consider how partnerships can be leveraged such as opportunities with Riverina Murray, Snowy Mountains and other surrounding LGAs. The Brindabella Road and Snowy Valleys ways present opportunities that can only be delivered through partnerships.



Source: Snowy Valleys Council, 2018

8. THEME 1: NATURE-BASED TOURISM

8.1. OVERVIEW

The natural assets of the Snowy Valleys are currently the primary product strength of the region, and one of the key motivators of visit. Although the level of nature-based product in the region is of exceptional quality and diversity, ancillary product development and supporting infrastructure has been limited to date and creates a significant opportunity for the region to grow visitation and yield through sustainably capitalising on these existing strengths.

8.2. NATURE-BASED GAME CHANGER PROJECTS

BLOWERING DAM DESTINATION ECO TOURISM ACCOMMODATION AND CAFÉ

Development of an eco tourism/glamping accommodation offer and café overlooking Blowering Dam. Further investigation as to the appropriate location should be investigated.

SUGAR PINE WALK AND PILOT HILL ARBORETUM DEVELOPMENT AND PACKAGING

Develop a masterplan for Sugar Pine Walk to determine sensitive infrastructure and enhancements required to support development of the site into a key visitor attraction for the region and attract funding to implement recommendations. Identify options to package and link with nearby Pilot Hill Arboretum through tracks/trails, signage etc.

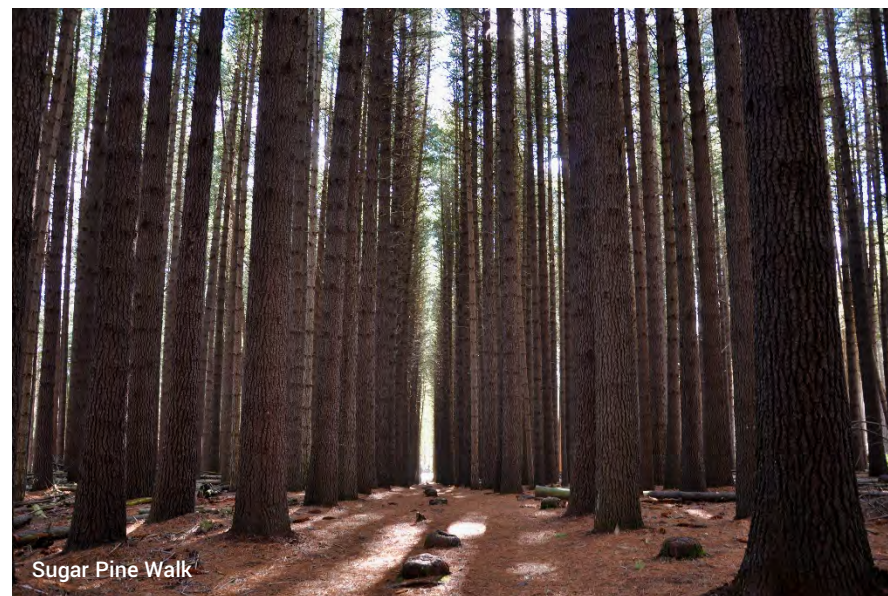
ALPINE ASH/MOUNTAIN GUM TREE TOP WALK

Development of a Treetop Walk in one of the existing sections of Alpine Ash/Mountain Gum within close proximity to Tumbarumba. This would need further investigation in terms of location and feasibility. This would create a strong nature-

based attraction for Tumbarumba, and potentially provide a must-do attraction for the Snowy Valleys Way (a similar example is the Otway Fly along the Great Ocean Road).

LANDERS FALLS SKY WALK

Enhancement of the existing Landers Falls lookout walk in the Tumut area of Kosciusko National Park to incorporate a skywalk. This again would create a must do nature-based activity for the area and provide a strong brand presence for the region.



Sugar Pine Walk

Source: Snowy Valleys Council, 2018

8.3. NATURE BASED TOURISM PROJECTS

PROJECT TITLE	LOCATION	PROJECT TIER	DESCRIPTION	ACTIONS
Blowering Dam destination development	To be determined	1	Development of an eco tourism/glamping accommodation offer and café overlooking Blowering Dam. Further investigation as to the appropriate location should be investigated in conjunction with existing key stakeholders and land managers.	<ul style="list-style-type: none"> • Council will work collaboratively with key stakeholders and land managers such as FCNSW/NPWS (dependant on location) to achieve desired outcomes including a site review and feasibility study to determine potential locations and feasibility of the concept.
Sugar Pine Walk and Pilot Hill Arboretum development and packaging	Laurel Hill	1	Development of a masterplan for Sugar Pine Walk at Laurel Hill to determine sensitive infrastructure and enhancements required to support development of the site into a key visitor attraction for the region and attract funding to implement recommendations. Identify options to package and link with nearby Pilot Hill Arboretum through tracks/trails, signage etc.	<ul style="list-style-type: none"> • Council will work collaboratively with key stakeholders and land managers (FCNSW) to achieve desired outcomes including the development of a masterplan for Sugar Pine Walk and Pilot Hill Arboretum. This should identify improvements for the precinct and also consider ongoing management of the sites.
Alpine Ash/Mountain Gum treetop walk	Tumbarumba	2	Development of a Treetop Walk in one of the existing sections of Alpine Ash/Mountain Gum within close proximity to Tumbarumba. This would need further investigation in conjunction with existing land managers in terms of location and feasibility. This would create a strong nature-based attraction for Tumbarumba, and potentially provide a must-do attraction for the Snowy Valleys Way (a similar example is the Otway Fly along the Great Ocean Road).	<ul style="list-style-type: none"> • In conjunction with land managers (FCNSW/NPWS) identify potential locations that are suited to establishment of a treetop walk in close proximity to Tumbarumba; and • Council will work collaboratively with key stakeholders and land managers (FCNSW) to achieve desired outcomes including the development of a feasibility study to determine the market potential of a tree top walk including discussions with funding organisations.
Landers Falls skywalk	Kosciuszko National Park	2	Enhancement of the existing Landers Falls lookout walk in the Tumut area of Kosciuszko National Park to incorporate a skywalk.	<ul style="list-style-type: none"> • Undertake discussions with Parks and Wildlife in relation to the establishment of an iconic lookout that is a must do experience.
Waterway infrastructure upgrades	Council Wide	2	Identification of required infrastructure improvements for sites across the region including lakes and dams, with supporting accessible infrastructure installed or upgraded at key sites including boat ramps, toilets, etc.	<ul style="list-style-type: none"> • In conjunction with land managers and user groups establish a working group to meet and discuss priorities for the region with regard to water access and other infrastructure; and • Develop a prioritised infrastructure list.

Parks and reserves infrastructure upgrades	Council Wide	2	Identification of required infrastructure improvements for parks and reserves with supporting accessible infrastructure installed or upgraded at key sites including toilets, picnic facilities, water etc.	<ul style="list-style-type: none"> • In conjunction with land managers and user groups establish a working group to meet and discuss priorities for the region with regard to parks and reserves; and • Develop a prioritised infrastructure list.
Wellness retreat	Batlow/Talbingo/ Khancoban	2	Development of a wellness retreat in Batlow, Talbingo, or Khancoban that can leverage visitation from the marketable attributes of clean mountain air, beautiful vistas and surrounding nature and wildlife. Possible locations for this include Batlow, Talbingo, or Khancoban	<ul style="list-style-type: none"> • Promote the opportunity for a wellness retreat through targeted investment attraction initiatives.
Tumut River walk loop	Tumut	2	Completing the loop for the existing north and south sections of the Tumut River Walk in Tumut.	<ul style="list-style-type: none"> • Allow budget for completion of the Tumut River Walk to create a continuous loop; and • Promote the walk through the development of targeted visitor information.
Adelong outdoor adventure playground	Adelong	2	Development of an inclusive and accessible outdoor adventure playground in the township of Adelong.	<ul style="list-style-type: none"> • Identify an appropriate location and develop a design for the establishment of an inclusive and accessible outdoor adventure playground.
'Dark sky' tourism product development	Talbingo/Batlow/ Kosciuszko National Park	3	Low light pollution levels in the area create an opportunity to create a 'Dark Park', observatory, or stargazing accommodation offer within Talbingo/Batlow/or Kosciuszko National Park.	<ul style="list-style-type: none"> • Promote the stargazing opportunities throughout the region.
KNP glamping accommodation	Kosciuszko National Park	3	Development of small scale glamping accommodation in Kosciuszko National Park.	<ul style="list-style-type: none"> • Undertake discussions with NSW Parks and Wildlife in relation to establishing glamping within the Park.
Equine trail development	Upper Murray Area	3	Identify opportunities to develop an experiential equine trail in the region, leveraging from the 'Man from Snowy River' narrative and potentially exploring linkages to the surrounding NE Victoria, and Snowy Mountains regions.	<ul style="list-style-type: none"> • Undertake discussions with key equine stakeholders and landholders in relation to identifying an appropriate location to establish the trail. • Explore the linkage with Corryong

9. THEME 2: CYCLING

9.1. OVERVIEW

With the recent growing popularity of cycling in the region, Snowy Valleys is well positioned to establish itself as the premier cycling destination in NSW.

The region has existing road cycling strengths and is geographically ideal for positioning itself as a competitor in the MTB space. Key to establishing cycling tourism in the region will be securing investment for the Hume and Hovell MTB Adventure Trail, and development of a rail trail network to capitalise on the first adopter advantage the region has secured with the ongoing Tumbarumba to Rosewood Pilot Rail Trail

9.2. CYCLING GAME CHANGER PROJECTS

HUME AND HOVELL MTB TRACK AND ADVENTURE TRAIL

Leveraging from the existing knowledge and popularity of the Hume and Hovell track provides a unique opportunity for the Snowy Valleys region. A Mountain Bike Masterplan for the track is currently underway and will require funding for implementation.

Future potential to create connections between the developed MTB trail and proposed MTB parks in Tumut and Tumbarumba should also be explored.

RAIL TRAIL INVESTMENT

With the first rail trail of the state currently being piloted in the region (Tumbarumba to Rosewood) Snowy Valleys has a significant opportunity to leverage its early adopter advantage to develop itself as the rail trail region of NSW through a staged approach. Identified projects requiring ongoing support and investment include:

- **Tumbarumba to Rosewood Pilot Rail Trail (Ongoing).** The Tumbarumba to Rosewood Pilot Rail Trail is well underway with legislation passed recently to allow closure of the railway line, and Council obtaining significant funding from the NSW Government for its construction.
- **Tumut to Batlow Rail Trail.** Awaiting the outcome of the Tumbarumba to Rosewood Rail Trail, prepare a detailed feasibility study and subsequent masterplan for the Tumut to Batlow Rail Trail to establish Snowy Valleys as the NSW rail trail region.
- **Tumbarumba to Batlow Rail Trail Link.** Awaiting the outcome of the Tumbarumba to Rosewood Rail Trail, undertake a scoping study for options to develop a link from the Tumbarumba trail head (Tumbarumba to Rosewood Rail Trail) to the Batlow trail head (Tumut to Batlow Rail Trail).
- **Rosewood to Ladysmith Rail Trail.** Assist community groups and facilitate the development of further stages of the Riverina Highlands Rail Trail, from Rosewood to Ladysmith, providing a link from the Tumbarumba to Rosewood Rail Trail to the Wagga Wagga Rail Trail
- **Rail Trail Enhancements.** Enhancements to proposed rail trails that will include a number of activations along each trail to create a more interesting experience which will engage visitors.

9.3. CYCLING PROJECTS

PROJECT TITLE	LOCATION	PROJECT TIER	DESCRIPTION	ACTIONS
Hume And Hovell MTB Track and Adventure Trail	Council wide	1	Leveraging from the existing knowledge and popularity of the Hume and Hovell track provides a unique opportunity for the Snowy Valleys region. A Mountain Bike Masterplan for the track is currently underway and will require funding for implementation.	<ul style="list-style-type: none"> • Complete the masterplan; and • Seek funding partners to assist in delivery.
Tumbarumba to Rosewood Pilot Rail Trail (Ongoing)	Tumbarumba to Rosewood	1	The Tumbarumba to Rosewood Pilot Rail Trail is well underway with legislation passed recently to allow closure of the railway line, and Council obtaining significant funding from the NSW Government for its construction.	<ul style="list-style-type: none"> • Complete the pilot project; and • Develop promotional material for the Tumbarumba to Rosewood Rail Trail.
Tumut to Batlow Rail Trail	Tumut to Batlow	1	Prepare a detailed feasibility study and subsequent masterplan for the Tumut to Batlow Rail Trail to establish Snowy Valleys as the NSW rail trail region.	<ul style="list-style-type: none"> • Council will remain impartial to this project and any future action be taken following a full review of the Tumbarumba to Rosewood Rail Trail. In the interim interested parties are encouraged to continue to progress with their planning works, including but not limited to feasibility studies.
Tumbarumba to Batlow Rail Trail Link	Tumbarumba to Batlow	2	Undertake a scoping study for options to develop a link from the Tumbarumba trail head (Tumbarumba to Rosewood Rail Trail) to the Batlow trail head (Tumut to Batlow Rail Trail).	<ul style="list-style-type: none"> • Council will remain impartial to this project and any future action be taken following a full review of the Tumbarumba to Rosewood Rail Trail. In the interim interested parties are encouraged to continue to progress with their planning works, including but not limited to scoping studies.
Rosewood to Ladysmith Rail Trail	Rosewood to Ladysmith	3	Assist community groups and facilitate the development of further stages of the Riverina Highlands Rail Trail, from Rosewood to Ladysmith, providing a link from the Tumbarumba to Rosewood Rail Trail to the Wagga Wagga Rail Trail.	<ul style="list-style-type: none"> • Assist where possible with regard to accessing grant funding to support trail investment.
Rail Trail Enhancements	Council wide	3	Enhancements to proposed rail trails that will include a number of activations along each trail to create a more interesting experience which will engage visitors.	<ul style="list-style-type: none"> • Incorporate enhancement concepts into rail trail design.

Tumbarumba creekscape bike precinct	Tumbarumba	1	Development of a bike hub, pump track and sheltered bike playground which will be an attraction for families visiting the rail trail and MTB trail (once developed) and help to foster a local cycling culture.	<ul style="list-style-type: none"> • Appoint a trail design and build company to implement the project.
Tumbarumba MTB Park	Tumbarumba	2	Tumbarumba has two small mountain bike circuits that are not formalised. The establishment of a formal mountain bike park on the edge of town should be explored.	<ul style="list-style-type: none"> • Undertake an environmental, cultural and heritage assessment and masterplan to develop a mountain bike park in Tumbarumba.
Tumut MTB Park	Tumut	2	Tumut has a small formalised mountain bike park on the edge of town. There is opportunity to expand the mountain bike park with agreement from adjoining public land owners.	<ul style="list-style-type: none"> • Undertake a masterplan for Tumut Mountain Bike park, with a focus to expanding the trail network.
Road cycling event	Tumbarumba	2	The region is very strong cycling credentials, with quiet roads and hill climbs. In conjunction with local cycling groups plan a cycling event route that may become an icon for road cycling in Australia. Tumbarumba is a logical starting point for the event which would include a loop into the high country to Cabramurra and return via Tooma.	<ul style="list-style-type: none"> • Provide seed funding to attract a cycling event operator such as bicycle network to establish a unique Snowy Valleys event.
MTB Event	Tumut & Tumbarumba	2	Following expansion of the mountain bike network in Tumut and Tumbarumba, there is opportunity to explore a mountain bike event for the town.	<ul style="list-style-type: none"> • Investigate opportunities for MTB bike events to be held in Tumut through discussions with regional mountain biking clubs (e.g. Wagga Wagga).
Road Cycling Enhancements	Council wide	3	Enhance and support Snowy Valleys emerging strength as a road cycling destination through activations including: <ul style="list-style-type: none"> • Filtered water stations in key townships; • Signage markers; and • Development of targeted advertising material. 	<ul style="list-style-type: none"> • Using STRAVA, undertake an audit and identify safe road cycling loops that can be promoted through digital media.

10. THEME 3: FOOD AND AGRITOURISM

10.1. OVERVIEW

Food and agritourism experiences have moved beyond being a trip necessity to, in many cases, being a key motivator for visit. With the development of supporting food and agritourism products behind the recent growth of many regional destinations, there is an opportunity for Snowy Valleys to capitalise on the abundance and diversity of its local produce to create contemporary, motivating experiences that will drive visitation to the region.

10.2. GAME CHANGER PROJECTS

CIDERY EXPERIENCE, BATLOW

The former Mountain Maid cannery building in Batlow presents an opportunity to create a food and beverage experience with a strong link to the local produce history of the region. Development of a cidery with associated tasting and food experiences would be ideal given the prominence of Batlow as an apple region. This would clearly be led by the private sector, but Council could assist in facilitating this investment.

TUMUT RIVER BREWERY DESTINATION DEVELOPMENT

The existing Tumut River Brewing Co has extensive plans underway to expand its current establishment and product offer which have the potential to create a signature destination food and beverage experience for Tumut. In particular, key expansion plans to be supported include:

- Venue expansion;
- Onsite coffee roasting;
- Site tours and merchandise;

- Local artist performances, acoustic sessions and themed nights;
- Gourmet Pizza Restaurant;
- Regional information/promotional area; and
- Parking expansion, outdoor entertainment, and possible accommodation (dependant on adjacent property acquisition).

A brewhouse expansion, new cannery/advanced bottling line, new QC systems, new partnerships with restaurants, bars and bottle shops, and an online store and subscription service are also planned, highlighting the potential of this business to be a significant operator and employer for the region.



Tumbafest 2018

Source: Snowy Valleys Council, 2018

10.3. FOOD AND AGRITOURISM PROJECTS

PROJECT TITLE	LOCATION	PROJECT TIER	DESCRIPTION	ACTIONS
Cidery Experience, Batlow	Batlow	1	The former Mountain Maid cannery building in Batlow presents an opportunity to create a food and beverage experience with a strong link to the local produce history of the region. Development of a cidery with associated tasting and food experiences would be ideal given the prominence of Batlow as an apple region. This would clearly be led by the private sector, but Council could assist in facilitating this investment.	<ul style="list-style-type: none"> • Ensure Council is facilitative of the opportunity for the private sector to establish a cidery in Batlow.
Brewery Destination Development	Tumut	1	Expansion of the brewery as a tourism product offer including: <ul style="list-style-type: none"> • Venue expansion; • Onsite coffee roasting; • Site tours and merchandise; • Local artist performances, acoustic sessions and themed nights; • Gourmet Pizza Restaurant; • Regional information/promotional area; and • Parking expansion, outdoor entertainment, and possible accommodation (dependant on Adjacent property acquisition). 	<ul style="list-style-type: none"> • Ensure Council is facilitative of and supports business operators to develop new and expand existing food and beverage experiences including reducing red tape and barriers.
Tumbarumba Wine Region Activation	Tumbarumba	2	Develop and promote the strength of Tumbarumba as a cool climate wine region, including developing contemporary cellar door experiences.	<ul style="list-style-type: none"> • Support investment in cellar door establishment where possible; • Support and assist the implementation of the Tumbarumba Vignerons Association branding exercise (e.g. through initiatives such as co-branding)
Regional Agritourism Trail	Council wide	2	There is an opportunity to capitalise on the growing interest from local producers to open up their farms to agritourism by developing an updated 'Farm Gate Trail', covering the whole region. This could involve reinvigorating and expanding the former "Southern Harvest Trail" partnership.	<ul style="list-style-type: none"> • Support investment in farm gate development and investigate the establishment of a farm gate trail.

Tumbarumba Craft Brewery or Distillery	Tumbarumba	2	As Tumbarumba develops as a wine, cycling and nature-based tourism destination, there will be a need to expand the food and beverage offer. One opportunity is the development of a craft brewery or distillery in Tumbarumba.	<ul style="list-style-type: none"> Promote the opportunity to attract investment in food and beverage establishments in Tumbarumba such as a distillery or craft brewery.
Beverage trail	Council wide	3	Development of a beverage trail through the region incorporating wineries, breweries, and/or cideries.	<ul style="list-style-type: none"> The establishment of a beverage trail should be considered following further investment has occurred.
Four Seasons in the Snowys Food Trail Event	Council wide	3	There is opportunity for the development of a quarterly food trail event throughout the Snowy Valleys region that celebrates the seasonal produce.	<ul style="list-style-type: none"> Establish a working group to develop a new iconic food trail event for the Snowy Valleys.
Food events calendar	Council Wide	2	Continue to develop the Snowy Valleys food events calendar with a focus on multi day experiential events and the expansion and increased promotion of existing signature food events held in the region.	<ul style="list-style-type: none"> Support the expansion and promotion of signature events showcasing food in the region.

11. THEME 4: HERITAGE AND CULTURE

11.1. OVERVIEW

The Snowy Valleys Region is rich in heritage and cultural assets, including significant indigenous cultural sites and iconic industrial heritage. Sustainable development of existing sites and interpretation of historical and cultural narratives presents a key opportunity to create a unique product strength that will support the development of other product strengths such as nature-based, cycling and touring in increasing visitation.

11.2. HERITAGE AND CULTURE GAME CHANGER PROJECTS

INDIGENOUS TOURISM FEASIBILITY STUDY

Undertake an Indigenous Tourism Feasibility Study to explore the potential to develop Indigenous tourism enterprise activities in the region, including assessment of key indigenous projects outlined within this DMP

TUMUT INDIGENOUS ATTRACTION

There is opportunity to develop a signature indigenous attraction for the region through further interpretation and expansion of the existing Butter Factory in Tumut to incorporate a greater indigenous presence including exhibits and its use as a base for indigenous tour operators.

SNOWY HYDRO 2.0 EDUCATIONAL EXPERIENCE

The Snowy 2.0 project provides a key opportunity to connect to a significant contemporary development whilst also leveraging from the existing industrial heritage of the region, through the development of an educational experience showcasing the history of the Snowy Hydro project. This could be developed at the Talbingo reservoir, one of two reservoirs to be linked through development of the 2.0 project.



Wiradjuri Aboriginal Cultural Tour

Source: Destination NSW 2018

11.3. HERITAGE AND CULTURE PROJECTS

PROJECT TITLE	LOCATION	PROJECT TIER	DESCRIPTION	ACTIONS
Indigenous Tourism Feasibility Study	Council wide	1	<p>Undertake an Indigenous Tourism Feasibility Study to explore the potential to develop Indigenous tourism enterprise activities in the region, including assessment of key indigenous projects outlined within this DMP, as well as identifying:</p> <ul style="list-style-type: none"> • Cultural sites and stories and linkages between sites; • Touring route development and tour business operator opportunities; • Education and training pathways; and • Investment requirements. 	<ul style="list-style-type: none"> • Undertake an Indigenous Tourism Feasibility Study to assess key projects outlined within the DMP, as well as identify further opportunities.
Tumut Indigenous Attraction	Tumut	1	<p>There is opportunity to develop a signature indigenous attraction for the region through further interpretation and expansion of the existing Butter Factory in Tumut to incorporate a greater indigenous presence including exhibits and its use as a base for indigenous tour operators.</p>	<ul style="list-style-type: none"> • Undertake a feasibility study and concept plan for the establishment of a stronger indigenous cultural tourism experience at the Butter Factory, collocated with the VIC; and • Investigate potential for indigenous tours to be operated from the Butter Factory.
Snowy Hydro 2.0 educational experience	Talbingo	1	<p>The Snowy 2.0 project provides a key opportunity to connect to a significant contemporary development whilst also leveraging from the existing industrial heritage of the region, through the development of an educational experience showcasing the history of the Snowy Hydro project. This could be developed at the Talbingo reservoir, one of two reservoirs to be linked through development of the 2.0 project.</p>	<ul style="list-style-type: none"> • Investigate education experience opportunities leveraging from interest in Snowy Hydro 2.0.
Second tier heritage sites development	Council wide	2	<p>There is a rich tapestry of heritage sites throughout Snowy Valleys that could be further enhanced through storytelling, interpretation, and signage. The preparation of a study which provides an audit and direction for various heritage sites should be considered including those related to industrial and gold rush heritage.</p>	<ul style="list-style-type: none"> • Undertake an audit of heritage sites throughout Snowy Valleys and make the heritage information available through digital resources.

Indigenous Songlines trail development	Brungle/Tumbarumba	2	Sensitive development of interpretative trails along existing Indigenous Songlines in Brungle and Tumbarumba, including linkages to and interpretation of key indigenous sites such as the Brungle Mission Station.	<ul style="list-style-type: none"> • Work in collaboration with local indigenous groups and land managers to identify opportunities for the sensitive development of interpretative trails along existing Indigenous Songlines in Brungle and Tumbarumba
Heritage trail network development	Council wide	3	Review the current trail network to determine potential for (improved) heritage interpretation of existing trails and development of new trails based on existing heritage narratives.	<ul style="list-style-type: none"> • Undertake a review and gap analysis of existing trails with regard to heritage interpretation and opportunities for further trail development.
Heritage and culture events calendar	Council Wide	3	Continue to develop the Snowy Valleys heritage and culture events calendar with a focus on multi day experiential events and the expansion and increased promotion of existing signature heritage and culture events held in the region.	<ul style="list-style-type: none"> • Support the expansion and promotion of signature events showcasing heritage and culture in the region.
Industrial heritage interpretation	Council wide	3	Undertake a detailed industrial heritage interpretation project for existing Snowy Hydro and Forestry sites including interpretation, signage and promotion.	<ul style="list-style-type: none"> • Work in collaboration with Snowy Hydro and Forestry Corporation NSW to undertake a detailed industrial heritage interpretation project for the region.
Gold trails	Tumut/Adelong	3	Improve interpretation and promotion of gold heritage sites along the Southern Gold Trail including those within Tumut and Adelong.	<ul style="list-style-type: none"> • Work collaboratively with Southern Gold Trail stakeholders to improve the interpretation and promotion of Snowy Valleys gold heritage sites located along the Southern Gold Trail.

12. THEME 5: ASSETS, INFRASTRUCTURE AND ACCOMMODATION

12.1. OVERVIEW

Existing assets, infrastructure and accommodation in the region are not in line with current visitor expectations, particularly if the region is to be competitive in the attraction of international experience seeker and millennial visitors. Actioning projects such as the Tumut township streetscape plan and activation will not only improve the visitor experience in the Snowy Valleys region, but will also increase liveability for the local community and reinstate community confidence in governmental direction.

12.2. GAME CHANGER PROJECTS

BRINDABELLA ROAD UPGRADE & DEVELOPMENT OF NEW TOURING ROUTE (CANBERRA)

Upgrading and sealing Brindabella Road would be a gamechanger for the Snowy Valleys region, providing a shorter and more desirable touring route from Canberra through to Tumut.

The scenic route will be popular for car clubs and also provide a direct route to access the broader Riverina Region.

There have been numerous studies undertaken in the past, however a thorough business case which explores the actual economic and tourism benefits of the road is required to progress this development.

As well as increasing opportunities to promote the region to the Canberra market, upgrading of this route would also enable both FCNSW and NPWS to increase signage and tourism awareness at the North East Victoria gateway for their respective assets in the region.

SNOWY VALLEYS WAY TOURING ROUTE REPOSITIONING AND PROMOTION

Significant revenue was outlaid in the development of the Snowy Valleys Touring Route and this should be repositioned and reinvigorated to take advantage of this expenditure.

There remains much opportunity to leverage from Sydney to Melbourne touring and the Snowy Valleys Way will provide an alternative route for visitors.

TUMBARUMBA CREEK CARAVAN PARK REDEVELOPMENT

The Tumbarumba Creek Caravan Park is currently undergoing a redevelopment after a successful funding application through the Stronger Regions Fund in 2016 by the former Tumbarumba Shire Council.

The first stage includes the development of worker accommodations which will take the form of two double storey modules to be constructed in the northern section of the park. These dwellings are capable of sleeping up to 120 people and will include laundry units and camp kitchen facilities.

The redevelopment work will include an increase in sites from 56 to 99 as well as a range of improved communal facilities

TUMUT TOWNSHIP STREETScape PLAN AND ACTIVATION

Investment in streetscape and urban design improvements in Tumut township to improve its attractiveness as a tourism hub. Township activation by facilitating retail, food and beverage and event investment from new and energetic investors in order to attract increased numbers of holiday leisure visitors to the township is also required.

12.3. ASSETS, INFRASTRUCTURE AND ACCOMMODATION PROJECTS

PROJECT TITLE	LOCATION	PROJECT TIER	DESCRIPTION	ACTIONS
Tumbarumba Creek Caravan Park Redevelopment	Tumbarumba	1	<p>The Tumbarumba Creek Caravan Park is currently undergoing a redevelopment after a successful funding application through the Stronger Regions Fund in 2016 by the former Tumbarumba Shire Council.</p> <p>The first stage includes the development of worker accommodations which will take the form of two double storey modules to be constructed in the northern section of the park. These dwellings are capable of sleeping up to 120 people and will include laundry units and camp kitchen facilities.</p> <p>The redevelopment work will include an increase in sites from 56 to 99 as well as a range of improved communal facilities.</p>	<ul style="list-style-type: none"> • Complete identified works; and • Identify a next phase of works to support further development of the park as a resort style caravan park.
Tumut Township Streetscape and Riverfront Activation Masterplan	Tumut	1	<p>Investment in streetscape and urban design improvements in Tumut township to improve its attractiveness as a tourism hub. Township activation by facilitating retail, food and beverage and event investment from new and energetic investors in order to attract increased numbers of holiday leisure visitors to the township is also required.</p> <p>Further enhancement of the riverfront is an opportunity for exploration. This includes consideration of the connection with the town centre and riverfront infrastructure to improve visitor experience such as a café, splash park and playground. Bright, Victoria provides a good example of a successful riverfront development.</p>	<ul style="list-style-type: none"> • Develop a project brief for a masterplan for the town centre and riverfront park area; and • Undertake a tender process to appoint a qualified and experienced planning and landscape consultant.
Brindabella Road Upgrade & development of new touring route (Canberra)	Tumut to Canberra	1	<p>Upgrading and sealing of Brindabella Road from Canberra through to Tumut, thereby creating a new and desirable touring route for the region.</p>	<ul style="list-style-type: none"> • Lobby State Government for funding for an updated feasibility study, economic benefit assessment and business case that takes into account the tourism potential of the proposal; and • Work with Riverina Murray Destination Network and other leading organisations to develop a tactical plan.

Snowy Valleys Way Touring Route Repositioning and Promotion	Council wide	1	Repositioning and reinvigorating the Snowy Valleys Way to capitalise on investment already outlaid and to provide an alternative route for visitors.	<ul style="list-style-type: none"> Undertake a masterplan for the establishment of a reinvigorated Snowy Valleys Way with other LGA partners and Riverina Murray Destination Network. This needs to consider: <ul style="list-style-type: none"> A new route focusing on NSW and exit via Albury/Wodonga; New branding; Identifying key tourism investments that will support the route; Market assessment and economic impact assessment; and Marketing plan.
Reinvestment in current accommodation stock	Council wide	2	<p>There are a number of existing accommodation establishments that, if invested in and repositioned to provide contemporary accommodation would meet market needs better. This includes consideration of:</p> <ul style="list-style-type: none"> Conversion to self-contained accommodation for family markets; Improvement to facilities and amenity, and Re branding. 	<ul style="list-style-type: none"> Develop a guide for accommodation establishments in conjunction with Riverina Murray Destination Network which will deliver ideas and recommendations for accommodation operators to consider with respect of transitioning accommodation to meet contemporary market need. This includes: <ul style="list-style-type: none"> Business models; Branding; Marketing; and Case studies.
Contemporary redevelopment of existing caravan parks	Council wide	2	Undertake a study of the condition of existing caravan parks within the region and their ability to meet contemporary accommodation standards and implement key findings.	<ul style="list-style-type: none"> Undertake a facilities audit of existing Council owned Caravan Parks; and Identify the needs of caravan parks to meet contemporary visitor expectations. Inform the development of an internal Council Policy for the management of Caravan Park leases and the identification of potential funding methods for future reinvestment and renewal.
Adelong and Batlow Caravan Park Masterplans	Adelong & Batlow	2	Prepare detailed redevelopment masterplans for Batlow and Adelong caravan parks.	<ul style="list-style-type: none"> Develop masterplans for Adelong and Batlow Caravan Parks inhouse with outside consultant support as required; and Implement identified works.
Resort style caravan park with family product focus	Tumut	2	In conjunction with the above, there is a need to explore the potential for a resort style caravan park in Tumut. This may be through improvement to an existing park or establishment of a new park.	<ul style="list-style-type: none"> Through study of existing caravan park conditions, determine existing caravan park to redevelop as a resort style caravan park with a family product focus and/or identify site for a new resort style caravan park if product gap exists.

Adelong main street activation	Adelong	3	Promote Adelong Main Street activation by facilitating retail, food and beverage and event investment from new and energetic investors.	<ul style="list-style-type: none"> • Identify investment targets; • Undertake Famils for investors; and • Provide ongoing support.
Khancoban township beautification	Khancoban	3	Continue to revitalise Khancoban Township through a series of small scale improvements including but not limited to refurbishing the Khancoban Shopping Centre and Rose Garden, and improving signage, walking and cycling paths.	<ul style="list-style-type: none"> • Undertake a community planning project for Khancoban, which identifies beautification and improved accessibility considerations.
Jingellic township	Jingellic	3	Leverage from the Murray River Road concept, making Jingellic a key stopping point on the touring route	Work with the cross border councils along the Murray River to establish and promote the Murray River Road touring concept that links Albury/Wodonga to the Upper Murray Region.
Free camping audit	Council wide	3	Conduct an audit of existing free camping facilities and determine any infrastructure and/or capacity development required.	<ul style="list-style-type: none"> • Undertake an audit of existing free camping sites; and • Identify the needs of free camping sites to meet contemporary visitor demand and expectations.
Short term rental review	Council wide	3	Conduct a review of existing short term rental properties in the region (such as AirBNB and HomeAway) to inform the review and preparation of the new Snowy Valleys Council Local Environment Plan (LEP).	<ul style="list-style-type: none"> • Conduct an audit of existing short term rental properties in the region; and • Consider the implications of the short term rental market when reviewing and preparing the new Snowy Valleys Council Local Environment Plan (LEP), to be undertaken by Councils planning department.
Sporting Infrastructure upgrades	Council wide	3	Audit of existing sporting infrastructure across the region to ensure facilities are of a high quality standard to service events which draw visitation to the region. This could also be used to determine the capacity level of current facilities and the potential demand for a new regional level sporting facility.	<ul style="list-style-type: none"> • Conduct an audit of current sporting infrastructure and facilities across the region.

13. THEME 6: STRATEGIC POSITIONING, LINKAGES AND TOURISM GOVERNANCE

13.1. INTRODUCTION

This section steps out initiatives for delivery and focus for tourism services in Snowy Valleys Council. This includes consideration of:

- Resource allocation;
- Digital service delivery;
- Physical visitor information service delivery;
- Destination marketing and branding;
- Product development and investment; and
- Industry development.

13.2. RESOURCES

The Snowy Valleys Strategy and Place Unit has a total of 10 full time, and 5 part time (4 staff fulfilling 2 full time positions, and one 0.6 FTE role) (Figure 16). Within this unit are the following staff resources dedicated to tourism:

- Coordinator Tourism and Economic Development (1FTE);
- Tourism Promotions Officer (1FTE);
- Tourism and Marketing Officer (1FTE-Vacant); and
- VIC Assistants (1FTE).

The overall tourism budget is estimated at \$622,000. Of importance to note is the very low allowance dedicated to marketing – around \$50,000, compared to \$248,000 dedicated to Visitor Information Centres.

Moving forward Snowy Valleys Council should focus further on areas which will attract visitation, this includes:

- A greater focus on digital marketing and social media – A dedicated resource in this area could also be used to support information services content; and
- Greater focus on industry development and product development – including advocacy for investment and promotion of investment opportunities.

Recommendations in relation to Visitor Information Services are incorporated into a separate report.

13.3. DIGITAL SERVICE DELIVERY

The delivery of digital information and marketing in Snowy Valleys is under serviced when benchmarked against leading tourism Councils.

More than 75% of visitors access their visitor information pre and during trip through digital sources and social media is growing as a key method of growing awareness and motivated visitation to regions to target markets.

Currently there are two websites operated by Council for tourism, this includes:

- Tumbarumba Region; and
- Tumut Region.

Both websites are largely out of date in terms of meeting current trends in destination websites that are motivational.

Resources should be set aside to improve and develop the online presence of Snowy Valleys and its destinations.

13.4. DESTINATION MARKETING AND BRANDS

BRAND

In most cases Council names and boundaries do not align very well with tourism regions or destinations.

In the case of Snowy Valleys there is a strong correlation between the Council area and tourism product geography.

Snowy Valleys adequately describes the region from a tourism product perspective and with further marketing and brand development could be developed as a regional tourism brand.

This will allow for a hierarchy of brands with Tumut Region and Tumbarumba Region as sub brands to a newly established Snowy Valleys brand.

Brand alignment with the Snowy Valleys Way should also be considered as this will form a key part of external marketing effort.



MARKETING

The current marketing budget for Snowy Valleys Council is low. Additional resources should be directed to marketing with a focus on improving Snowy Valley's digital and social media presence.

A dedicated and skilled marketing officer who manages and develops web and social media content will be important for moving the region forward. Collaboration with broader marketing programs including those linked to Riverina Murray tourism should be explored.

13.5. PRODUCT DEVELOPMENT AND INVESTMENT

Investment in product development is essential for growth of Snowy Valleys Council. Snowy Valley's role should be focused to promoting investment opportunities and also facilitating investment through the planning process.

Snowy Valleys Council should promote private sector investment opportunities through development of a clear business case for investment and prospectus. This needs to consider demand for product and also location for investment.

13.6. INDUSTRY DEVELOPMENT

Supporting the existing tourism industry should remain a key role for Snowy Valleys Council. Common practice is the provision of opportunities for networking, joint marketing programs, referral from VICs and investment support.

13.6.1. TOURISM ADVISORY COMMITTEE

Urban Enterprise has had extensive experience working with Local Tourism Associations, Advisory Committees, Township Chambers and Regional Tourism Organisations. Given the level of development of the tourism industry in Snowy Valley's Shire it is recommended that an informal tourism working group be established to maintain connection with industry. This may also have a Councillor appointed to the working group. A working group is preferred to an advisory committee in order to reduce formalities and resources required to administer an 'advisory committee'. In addition, decision making should rest with Council officers and Councillors as elected representatives, rather than a two-tier process of a formal advisory committee and Council.

13.7. EVENT PROCUREMENT

In the immediate term the resources and procurement of events within Snowy Valleys Council should be a focus in order to strengthen visitation and also assist in awareness building in targeted markets.

Additional funding should be made available to attract event operators to the Snowy Valleys. In addition new event procurement policy should consider the following:

- Support for events which are multi day that encourage overnight visitation and stays in commercial visitor accommodation;
- Events that are on brand and focus towards Snowy Valleys target markets, this includes:
 - Food events;
 - Cycling events; and
 - Nature-based events.
- Events that encourage visitation during off peak periods.

An events officer should be focused towards procuring and supporting events, not coordinating events. The reason for this is that event coordination is very time consuming and the role needs to be more tactical and strategic in order to attract new events and support existing events.

13.8. PARTNERSHIPS AND COLLABORATION

Snowy Valleys Council should leverage as much as possible, its relationship with Riverina Murray Destination Network. Of most importance for Snowy Valleys is to seek leadership from Riverina Murray with regard to its digital presence and marketing of Snowy Valleys.

There may be opportunity to collaborate with Riverina Murray in relation to destination marketing and high quality web delivery.

13.9. TOURISM DELIVERY AND OPERATIONAL PROJECTS

PROJECT TITLE	PRIORITY (YEAR)	DESCRIPTION	NEXT STEPS
Reallocation of Staff Resourcing	1	<p>There is a need to allocate staff resourcing to allow for the best possible return on investment into tourism. Specifically, this should include the following tourism roles:</p> <ul style="list-style-type: none"> Coordinator Tourism and Economic Development (1FTE) key roles: <ul style="list-style-type: none"> Coordinating and managing tourism unit; Leading strategic programs; Product development/ investment attraction; and Management of partnerships with Riverina Murray, Parks and Wildlife, Snowy Valleys Way etc. Marketing and Digital Media Officer: <ul style="list-style-type: none"> Establishment of digital media presence; and Ongoing content development for websites and social media. Visitor Information Centre Coordinator and Industry Development <ul style="list-style-type: none"> Coordinated approach to Visitor information collateral; Industry liaison; and Industry training. VIC staff Events officer (greater focus for existing events officer role on tourism related events): <ul style="list-style-type: none"> Tourism events policy; Procurement of tourism events; and Allocation of grants for tourism events. 	<ul style="list-style-type: none"> Implement new roles and responsibilities to staff.
Brand Development	1	<p>There is a need to undertake a brand development strategy for Snowy Valleys, its key towns and Snowy Valleys Way. This should be undertaken as one exercise to ensure there is linkage between brands developed across the regional destination and sub destinations.</p>	<ul style="list-style-type: none"> Appoint an experienced brand consultant to delivery a brand strategy and graphic work to be used across promotional material, digital media and signage.

Digital and Social Media Marketing Strategy	1	<p>Digital and social media content should be delivered by a dedicated officer in Snowy Valleys Council who has experience with content development.</p> <p>A digital and social media strategy should be prepared which outlines procedures, social media platforms and marketing and purchasing needs.</p>	<ul style="list-style-type: none"> • Appoint a specialist digital and social media consultant to prepare a digital and social media strategy; and • Ensure that there is an officer responsible for delivery of this.
External Marketing Programs	2-3	<p>Snowy Valleys should collaborate where possible with Riverina Murray Tourism in external marketing programs. There is opportunity for buy into collaborative marketing programs through Riverina Murray. The cost for buy in is around \$10,000. Agreement should be made on having a discrete sub campaign specifically for Snowy Valleys.</p>	<ul style="list-style-type: none"> • Snowy Valleys Council to commit to cooperative marketing campaigns through Riverina Murray.
Investment Business Case	2	<p>Prepare an investment business case for Game Changer projects identified in this strategic plan. This will consider supply and demand and clearly identify investment opportunities. This should be prepared in a high quality graphic prospectus.</p>	<ul style="list-style-type: none"> • Undertake an investment business case for key projects in this plan; and • Prepare a prospectus to market the business case projects.
Targeted Investment Attraction	2	<p>Undertake ongoing investment attraction and facilitation of new business and development that aligns to this plan. This would include support by Economic Development and Planning.</p>	<ul style="list-style-type: none"> • Identify investment targets; • Undertake Famils for investors; and • Provide ongoing support.
Events Policy and Funding	1	<p>Prepare a new events policy that outlines events that have potential to receive funding and support from Council. This Policy will also have a substantial amount of funding to attract events to Snowy Valleys that meet agreed criteria.</p>	<ul style="list-style-type: none"> • Establish new policy for tourism events; and • Allocate event funding pool.
Event Operators Forum	2	<p>Create a supportive and collaborative approach to existing festival and event organisers in the Snowy Valleys and look at ways to expand and grow these events.</p>	<ul style="list-style-type: none"> • Undertake a forum for event operators to share ideas and explore potential collaboration opportunities. This should also consider a presentation of funding opportunities.

14. IMPLEMENTATION PLAN

The implementation plan provides guidance relating to the delivery timeframes of projects identified in the plan. It is expected that annual workplans be prepared that align with the implementation plan. The implementation plan provides for the following:

- **Short term projects** – Years 1 and 2;
- **Medium term projects** – Years 3 and 4; and
- **Longer term projects** – Years 4 and 5

PROJECT	RESPONSIBILITY	CATEGORY	TIMEFRAME (YEAR)	INDICATIVE COST
SHORT TERM PROJECTS [YEARS 1-2]				
Project 56 - Reallocation of Staff Resourcing ACTION 1.1 Implement new roles and responsibilities to staff.	Snowy Valleys Council	Tourism Delivery and Operations	1	-
Project 8 - Tumut River walk loop. ACTION 1.2 Allow budget for completion of the Tumut River Walk to create a continuous loop. ACTION 1.3 Promote the walk through visitor information.	Snowy Valleys Council, NSW National Parks and Wildlife Service	Product Development: Nature-based	1-2	\$200,000
Project 35 - Snowy Hydro 2.0 educational experience. ACTION 1.4 Investigate education experience opportunities leveraging from interest in Snowy Hydro 2.0.	Snowy Valleys Council, NSW National Parks and Wildlife Service, Snowy Hydro	Product Development: Heritage & Culture	1-2	-
Project 13 - Hume and Hovell MTB Track and Adventure Trail. ACTION 1.5 Complete the masterplan. ACTION 1.6 Seek funding partners to assist in delivery.	Snowy Valleys Council, NSW National Parks and Wildlife Service, Forestry Corporation NSW, DELWP	Product Development: Cycling	1-2	-

<p>Project 16 - Tumbarumba to Rosewood Pilot Rail Trail (ongoing).</p> <p>ACTION 1.7 Complete the pilot project.</p> <p>ACTION 1.8 Develop promotional material for the Tumbarumba to Rosewood Rail Trail.</p>	Snowy Valleys Council	Product Development: Cycling	1-2	\$10,000
<p>Project 20 - Tumbarumba MTB Park.</p> <p>ACTION 1.9 Undertake an environmental, cultural and heritage assessment and masterplan to develop a mountain bike park in Tumbarumba.</p>	Snowy Valleys Council Cycle Tumbarumba	Product Development: Cycling	1-2	\$30,000
<p>Project 21 - Tumut MTB Park.</p> <p>ACTION 1.10 Undertake a masterplan for Tumut Mountain Bike park, with a focus to expand the trail network.</p>	Snowy Valleys Council, NSW National Parks and Wildlife Service	Product Development: Cycling	1-2	\$30,000
<p>Project 24 - Road Cycling Enhancements</p> <p>ACTION 1.11 Using STRAVA, undertake an audit and identify safe road cycling loops that can be promoted through digital media.</p>	Snowy Valleys Council	Product Development: Cycling	1-2	\$5,000
<p>Project 25 - Cidery Experience, Batlow.</p> <p>ACTION 1.12 Ensure Council is facilitative of the opportunity for the private sector to establish a cidery in Batlow.</p>	Snowy Valleys Council, Private Sector	Product Development: Food, Beverage and Agritourism	1-2	-
<p>Project 26 – Craft Brewery Experience</p> <p>ACTION 1.13 Ensure Council is facilitative of and supports business operators to develop new and expand existing food and beverage experiences including reducing red tape and barriers.</p>	Snowy Valleys Council, Private Sector	Product Development: Food, Beverage and Agritourism	1-2	-
<p>Project 28 - Regional Agritourism Trail.</p>	Snowy Valleys Council	Product Development:	1-2	\$10,000

<p>ACTION 1.14 Support investment in farm gate development and investigate the establishment of a farm gate trail.</p>		Food, Beverage and Agritourism		
<p>Project 42 - Tumbarumba Creek Caravan Park Redevelopment.</p> <p>ACTION 1.15 Complete identified works.</p> <p>ACTION 1.16 Identify a next phase of works to support further development of the park as a resort style caravan park.</p>	Snowy Valleys Council, Private Sector	Product Development: Accommodation	1-2	-
<p>Project 45 - Snowy Valleys Way Touring Route repositioning and promotion.</p> <p>ACTION 1.17 Undertake a masterplan for the establishment of a reinvigorated Snowy Valleys Way with the other LGA partners and Riverina Murray Destination Network. This needs to consider:</p> <ul style="list-style-type: none"> - A new route focusing on NSW and exit via Albury/Wodonga; - New branding; - Identifying key tourism investment that will support the route; - Market assessment and economic impact assessment; and - Marketing plan 	Snowy Valleys Council, Cootamundra Gundagai Regional Council, Towong Shire	Infrastructure and Access and Marketing	1-2	\$30,000
<p>Project 37 - Contemporary redevelopment of existing caravan parks</p> <p>ACTION 1.18 Undertake an audit of existing Council owned Caravan Parks.</p> <p>ACTION 1.19 Identify the needs of caravan parks to meet contemporary visitor expectations.</p>	Snowy Valleys Council	Product Development: Accommodation	1-2	\$20,000

ACTION 1.20 Inform the development of an internal Council Policy for the management of Caravan Park leases and the identification of potential funding methods for future reinvestment and renewal.				
Project 57 - Brand development ACTION 1.21 Appoint an experienced brand consultant to deliver a brand strategy and graphic work to be used across promotional material, digital media and signage.	Snowy Valleys Council	Tourism Delivery and Operations	1-2	\$40,000
Project 58 - Digital and Social Media Marketing Strategy ACTION 1.22 Appoint a specialist digital and social media consultant to prepare a digital and social media strategy. ACTION 1.23 Ensure that there is an officer responsible for delivery of this.	Snowy Valleys Council	Tourism Delivery and Operations	1-2	\$30,000
Project 60 - Investment Business Case ACTION 1.24 Undertake an investment business case for key projects in this plan. ACTION 1.25 Prepare a prospectus to market the business case projects.	Snowy Valleys Council	Tourism Delivery and Operations	1-2	\$35,000
Project 62 - Events Policy and funding. ACTION 1.26 Establish a new policy for tourism events. ACTION 1.27 Allocate events funding pool.	Snowy Valleys Council	Tourism Delivery and Operations	1-2	\$300,000
Project 44 - Brindabella Road Upgrade and development of new touring route (Canberra). ACTION 1.28 Lobby State Government for funding for an updated feasibility study, economic benefit assessment and business	Snowy Valleys Council, Riverina Murray Destination Network, Regional Development	Infrastructure and Access	1-3	-

<p>case that takes into account the tourism potential of the proposal.</p> <p>ACTION 1.29 Work with Riverina Murray Destination Network and other leading organisations to develop a tactical plan.</p>				
<p>Project 27 - Tumbarumba Wine Region Activation.</p> <p>ACTION 1.30 Support investment in cellar door establishment where possible.</p> <p>ACTION 1.31 Support and assist the implementation of the Tumbarumba Vignerons Association branding exercise (e.g. through initiatives such as co-branding)</p>	Snowy Valleys Council	Product Development: Food, Beverage and Agritourism	1-5	-
<p>Project 33 - Indigenous Tourism Feasibility Study</p> <p>ACTION 1.32 Undertake an Indigenous Tourism Feasibility Study to assess key projects outlined within the DMP, as well as identify further opportunities.</p>	Snowy Valleys Council Industry Groups & Land Councils/Managers	Product Development: Indigenous	1-2	\$50,000
<p>Project 36 - Second tier heritage site development.</p> <p>ACTION 1.33 Undertake an audit of heritage sites throughout Snowy Valleys and make the heritage information available through digital resources.</p>	Snowy Valleys Council, Tumut and Tumbarumba Regional Tourism	Product Development: Heritage & Culture	1-2	\$30,000
<p>Project 39 - Heritage and culture events calendar</p> <p>ACTION 1.34 Support the expansion and promotion of signature events showcasing heritage and culture in the region.</p>	Snowy Valleys Council Private Operators	Product Development: Events	1-2	-
<p>Project 41 – Gold Trails</p> <p>ACTION 1.35 Work collaboratively with Southern Gold Trail stakeholders to improve the interpretation and promotion of Snowy Valleys gold heritage sites located along the Southern Gold Trail.</p>	Snowy Valleys Council Private Operators	Product Development: Heritage & Culture	1-2	5,000

<p>Project 46 - Reinvestment in current accommodation stock.</p> <p>ACTION 1.36 Develop a guide for accommodation establishments in conjunction with Riverina Murray Destination Network, which will deliver ideas and recommendations for accommodation operators to consider with respect to transitioning accommodation to meet contemporary market needs. This includes:</p> <ul style="list-style-type: none"> - Business models; - Branding; - Marketing; and - Case studies. 	<p>Snowy Valleys Council, Riverina Murray Destination Network</p>	<p>Product Development: Accommodation</p>	<p>1-5</p>	<p>\$10,000</p>
<p>Project 46 – Jingellic Township</p> <p>ACTION 1.37 Work with the cross border councils along the Murray River to establish and promote the Murray River Road touring concept that links Albury/Wodonga to the Upper Murray Region.</p>	<p>Snowy Valleys Council Cross border Councils</p>	<p>Product Development: Township Improvement</p>	<p>1-2</p>	<p>-</p>
<p>Project 51 - Khancoban township beautification</p> <p>ACTION 1.38 Undertake a community planning project for Khancoban, which identifies beautification and improved accessibility considerations.</p>	<p>Snowy Valleys Council</p>	<p>Product Development: Township Improvement</p>	<p>1-2</p>	<p>-</p>
<p>Project 59 - External marketing programs</p> <p>ACTION 1.39 Snowy Valleys Council to commit to cooperative marketing campaigns through Riverina Murray.</p>	<p>Snowy Valleys Council, Riverina Murray Destination Network</p>	<p>Tourism Delivery and Operations</p>	<p>1-5</p>	<p>-</p>
<p>Project 61 - Targeted Investment Attraction</p> <p>ACTION 1.40 Identify investment targets.</p> <p>ACTION 1.41 Undertake Famils for investors.</p>	<p>Snowy Valleys Council</p>	<p>Tourism Delivery and Operations</p>	<p>1-3</p>	<p>\$15,000</p>

ACTION 1.42 Provide ongoing support.				
Project 63 – Event operators forum ACTION 1.43 Undertake a forum for event operators to share ideas and explore potential collaboration opportunities. This should also consider a presentation of funding opportunities.	Snowy Valleys Council	Tourism Delivery and Operations	1-2	--
MEDIUM TERM PROJECTS [YEARS 2-3]				
Project 2 - Sugar Pine Walk and Pilot Hill Arboretum development and packaging. ACTION 1.44 Council will work collaboratively with key stakeholders and land managers (FCNSW) to achieve desired outcomes including the development of a masterplan for Sugar Pine Walk and Pilot Hill Arboretum. This should identify improvements for the precinct and also consider ongoing management of the sites.	Snowy Valleys Council, Private Sector, Forestry Corporation NSW	Product Development: Nature-based	2	\$30,000
Project 4 - Landers Falls Skywalk. ACTION 1.45 Undertake discussions with Parks and Wildlife in relation to the establishment of an iconic lookout that is a must do experience.	Snowy Valleys Council, NSW National Parks and Wildlife Service,	Product Development: Nature-based	2	-
Project 19 - Tumbarumba creekscape bike precinct. ACTION 1.46 Appoint a trail design and build company to implement the project.	Snowy Valleys Council	Product Development: Cycling	2	\$200,000
Project 50 - Adelong main street activation. ACTION 1.47 Identify investment targets. ACTION 1.48 Develop small activation events.	Snowy Valley Council	Product Development: Township Improvement	2	\$20,000

ACTION 1.49	Undertake Famils for investors.				
ACTION 1.50	Provide ongoing support.				
Project 5 - Waterway infrastructure upgrades.					
ACTION 1.51	In conjunction with land managers and user groups establish a working group to meet and discuss priorities for the region with regard to water access and other infrastructure; and	Snowy Valleys Council, NSW National Parks and Wildlife Service, User groups	Product Development: Nature-based	2-3	-
ACTION 1.52	Develop a prioritised infrastructure list.				
Project 6 - Parks and reserves infrastructure upgrades.					
ACTION 1.53	In conjunction with land managers and user groups establish a working group to meet and discuss priorities for the region with regard to parks and reserves.	Snowy Valleys Council, NSW National Parks and Wildlife Service, User groups	Product Development: Nature-based	2-3	-
ACTION 1.54	Develop a prioritised infrastructure list.				
Project 34 - Tumut indigenous attraction.					
ACTION 1.55	Undertake a feasibility study and concept design plan for the establishment of a stronger indigenous cultural tourism experience at the Old Butter Factory, collocated with the VIC.	Snowy Valleys Council Industry Groups & Land Councils/Managers	Product Development: Indigenous	2-3	\$30,000
ACTION 1.56	Investigate potential for indigenous tours to be operated from the Old Butter Factory.				
Project 37 – Indigenous Songlines Trail development					
ACTION 1.57	Work in collaboration with local indigenous groups and land managers to identify opportunities for the sensitive development of interpretative trails along existing Indigenous Songlines in Brungle and Tumbarumba	Snowy Valleys Council Industry Groups & Land Councils/Managers	Product Development: Indigenous	2-3	-
Project 38 - Heritage trail network development		Snowy Valleys Council	Product Development:	2-3	\$20,000

<p>ACTION 1.58 Undertake a review and gap analysis of existing trails with regard to heritage interpretation and opportunities for further trail development.</p>	<p>Industry Groups, NSW National Parks and Wildlife Service, Land Councils/Managers</p>	<p>Heritage & Culture</p>		
<p>Project 40 - Industrial heritage interpretation</p> <p>ACTION 1.59 Work in collaboration with Snowy Hydro and Forestry Corporation NSW to undertake a detailed industrial heritage interpretation project for the region.</p>	<p>Snowy Valleys Council, Snowy Hydro and Forestry Corporation NSW</p>	<p>Product Development: Heritage & Culture</p>	<p>2-3</p>	<p>\$15,000</p>
<p>Project 9 - Adelong outdoor adventure playground.</p> <p>ACTION 1.60 Identify an appropriate location and develop a design for the establishment of an inclusive and accessible outdoor adventure playground.</p>	<p>Snowy Valleys Council</p>	<p>Product Development: Township Improvement</p>	<p>2-3</p>	<p>\$100,000</p>
<p>Project 12 - Equine trail development</p> <p>ACTION 1.61 Undertake discussions with key equine stakeholders and landholders in relation to identifying an appropriate location to establish the trail.</p> <p>ACTION 1.62 Explore the linkage with Corryong</p>	<p>Snowy Valleys Council, NSW National Parks and Wildlife Service, Forestry Corporation NSW</p>	<p>Product Development: Heritage & Culture</p>	<p>2-3</p>	<p>-</p>
<p>Project 11 - KNP glamping accommodation.</p> <p>ACTION 1.63 Undertake discussions with NSW Parks and Wildlife in relation to establishing glamping within the park.</p>	<p>Snowy Valleys Council, NSW National Parks and Wildlife Service,</p>	<p>Product Development: Nature-based & Accommodation</p>	<p>2-3</p>	<p>-</p>
<p>Project 17 - Rosewood to Ladysmith Rail Trail.</p> <p>ACTION 1.64 Assist community groups and facilitate the development of further stages of the Riverina Highlands Rail Trail, from Rosewood to Ladysmith, providing a link from the Tumbarumba to Rosewood Rail Trail to the Wagga Wagga Rail Trail</p>	<p>Snowy Valleys Council, City of Wagga Wagga</p>	<p>Product Development: Cycling</p>	<p>2-3</p>	<p>\$25,000</p>

<p>Project 18- Rail Trail Enhancements.</p> <p>ACTION 1.65 Incorporate enhancement concepts into rail trail design.</p>	Snowy Valleys Council	Product Development: Cycling	2-3	\$40,000
<p>Project 22 - Road cycling event.</p> <p>ACTION 1.66 Provide seed funding to attract a cycling event operator such as bicycles network to establish a unique Snowy Valleys event.</p>	Snowy Valleys Council	Product Development: Cycling	2-3	\$40,000
<p>Project 23 - MTB event.</p> <p>ACTION 1.67 Investigate opportunities for MTB events to be held in Tumut through discussions with regional mountain biking clubs (e.g. Wagga Wagga).</p>	Snowy Valleys Council	Product Development: Cycling	2-3	-
<p>Project 29 - Tumbarumba Craft Brewery or Distillery.</p> <p>ACTION 1.68 Promote the opportunity to attract investment in food and beverage establishments in Tumbarumba such as a distillery or craft brewery.</p>	Snowy Valleys Council	Product Development: Food, Beverage and Agritourism	2-3	\$15,000
<p>Project 43 - Tumut Township Streetscape and Riverfront Activation Masterplan.</p> <p>ACTION 1.69 Develop a project brief for a masterplan for the town centre and riverfront park area.</p> <p>ACTION 1.70 Undertake a tender process to appoint a qualified and experienced planning and landscape consultant.</p>	Snowy Valleys Council	Product Development: Township Improvement	2-3	\$50,000
<p>Project 49 - Resort style caravan park with family product focus.</p> <p>ACTION 1.71 Through study of existing caravan park condition, determine existing caravan park to redevelop as a resort style</p>	Snowy Valleys Council, Private sector	Product Development: Accommodation	2-3	-

caravan park with a family product focus and/or if a product gap exists for a new resort style caravan park.				
Project 31 - Four Seasons in the Snowys Food Trail Event ACTION 1.72 Establish a working group to develop a new iconic food trail event for the Snowy Valleys.	Snowy Valleys Council, Private sector	Snowy Valleys Council, Events	2-3	-
Project 32 - Food events calendar ACTION 1.73 Support the expansion and promotion of signature events showcasing food in the region.	Snowy Valleys Council, Private sector	Snowy Valleys Council, Events	2-3	-
Project 53 - Free camping audit ACTION 1.74 Undertake an audit of existing free camping sites; ACTION 1.75 Identify the needs of free camping sites to meet contemporary visitor demand and expectations.	Snowy Valleys Council	Product Development: Township Improvement	2-3	-
Project 54 - Short term rental review ACTION 1.76 Conduct an audit of existing short term rental properties in the region; and ACTION 1.77 Consider the implications of the short term rental market when reviewing and preparing the new Snowy Valleys Council Local Environment Plan (LEP), to be undertaken by Councils planning department.	Snowy Valleys Council	Product Development: Township Improvement	2-3	-
Project 55 - Sporting Infrastructure upgrades ACTION 1.78 Conduct an audit of current sporting infrastructure and facilities across the region.	Snowy Valleys Council	Product Development: Township Improvement	2-3	\$20,000
LONGER TERM PROJECTS [YEARS 4-5]				

<p>Project 15 - Tumut to Batlow Rail Trail.</p> <p>ACTION 1.79 Council will remain impartial to this project and any future action be taken following a full review of the Tumbarumba to Rosewood Rail Trail. In the interim interested parties are encouraged to continue to progress with their planning works, including but not limited to feasibility studies.</p>	To be determined	Product Development: Cycling	4-5	To be determined
<p>Project 16 - Tumbarumba to Batlow Rail Trail Link.</p> <p>ACTION 1.80 Council will remain impartial to this project and any future action be taken following a full review of the Tumbarumba to Rosewood Rail Trail. In the interim interested parties are encouraged to continue to progress with their planning works, including but not limited to scoping studies.</p>	To be determined	Product Development: Cycling	4-5	To be determined
<p>Project 1 - Blowering Dam destination development.</p> <p>ACTION 1.81 Council will work collaboratively with key stakeholders and land managers such as FCNSW/NPWS (dependant on location) to achieve desired outcomes including a site review and feasibility study to determine potential locations and feasibility of the concept.</p>	Snowy Valleys Council, NSW National Parks and Wildlife Service, Forestry Corporation NSW, Private Sector	Product Development: Accommodation	3-5	\$35,000
<p>Project 3 – Alpine Ash/Mountain Gum treetop walk.</p> <p>ACTION 1.82 In conjunction with land managers (FCNSW/NPWS) identify potential locations that are suited to establishment of a treetop walk in close proximity to Tumbarumba; and</p> <p>ACTION 1.83 Council will work collaboratively with key stakeholders and land managers (FCNSW) to achieve desired outcomes including the development of a feasibility study to determine the market potential of a tree top walk including discussions with funding organisations.</p>	Snowy Valleys Council, NSW National Parks and Wildlife Service, Forestry Corporation NSW, Regional Development NSW	Product Development: Nature-based	3-5	\$20,000

<p>Project 7 - Wellness retreat.</p> <p>ACTION 1.84 Promote the opportunity for a wellness retreat through targeted investment attraction initiatives.</p>	<p>Snowy Valleys Council Private Sector</p>	<p>Product Development: Nature-based</p>	<p>3-5</p>	<p>\$15,000</p>
<p>Project 10 - 'Dark sky' tourism product development.</p> <p>ACTION 1.85 Promote the stargazing opportunities through the region.</p>	<p>Snowy Valleys Council, Tumut and Tumbarumba Regional Tourism</p>	<p>Product Development: Nature-based</p>	<p>3-5</p>	<p>\$5,000</p>
<p>Project 30 - Beverage trail.</p> <p>ACTION 1.86 The establishment of a beverage trail should be considered following the occurrence of further investment.</p>	<p>Snowy Valleys Council</p>	<p>Product Development: Food, Beverage and Agritourism</p>	<p>3-5</p>	<p>\$20,000</p>

APPENDICES

APPENDIX A TOURISM INDUSTRY CATEGORISATION

Tourism industries identified within the economic profile were categorised based on adaptation of *ABS 5249.0 – Australian National Accounts: Tourism Satellite Account, 2013-2014 Appendix 1 Tourism Industry Correspondence*.

Categories used comprised the following ANZSIC classes:

ACCOMMODATION AND FOOD SERVICES (DIVISION H)

Subdivision 44 ACCOMMODATION

- Group 440 ACCOMMODATION
 - Class 4400 Accommodation

Subdivision 45 FOOD AND BEVERAGE SERVICES

- Group 451 CAFES, RESTAURANTS AND TAKEAWAY FOOD SERVICES
 - Class 4511 Cafes and Restaurants
 - Class 4512 Takeaway Food Services
 - Class 4513 Catering Services
- Group 451 PUBS, TAVERNS AND BARS
 - Class 4520 Pubs, Taverns and Bars
- Group 453 CLUBS (HOSPITALITY)
 - Class 4530 Clubs (Hospitality)

RETAIL TRADE (DIVISION G)

Subdivision 40 FUEL RETAILING

- Group 400 FUEL RETAILING
 - Class 4000 Fuel Retailing

Subdivision 41 FOOD RETAILING

- Group 411 SUPERMARKET AND GROCERY STORES
 - Class 4110 Supermarket and Grocery Stores
- Group 412 SPECIALISED FOOD RETAILING
 - Class 4121 Fresh Meat, Fish and Poultry Retailing
 - Class 4122 Fruit and Vegetable Retailing
 - Class 4123 Liquor Retailing
 - Class 4129 Other Specialised Food Retailing

Subdivision 42 OTHER STORE-BASED RETAILING

- Group 421 FURNITURE, FLOOR COVERINGS, HOUSEWARE AND TEXTILE GOODS RETAILING
 - Class 4211 Furniture Retailing
 - Class 4212 Floor Coverings Retailing
 - Class 4213 Houseware Retailing
 - Class 4214 Manchester and Other Textile Goods Retailing
- Group 424 RECREATIONAL GOODS RETAILING
 - Class 4241 Sport and Camping Equipment Retailing
 - Class 4242 Entertainment Media Retailing
 - Class 4243 Toy and Game Retailing
 - Class 4244 Newspaper and Book Retailing
 - Class 4245 Marine Equipment Retailing
- Group 425 CLOTHING, FOOTWEAR AND PERSONAL ACCESSORY RETAILING

- Class 4251 Clothing Retailing
- Class 4252 Footwear Retailing
- Class 4253 Watch and Jewellery Retailing
- Class 4259 Other Personal Accessory Retailing
- Group 426 DEPARTMENT STORES
 - Class 4260 Department Stores
- Group 427 PHARMACEUTICAL AND OTHER STORE-BASED RETAILING
 - Class 4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing
 - Class 4272 Stationery Goods Retailing
 - Class 4273 Antique and Used Goods Retailing
 - Class 4274 Flower Retailing
 - Class 4279 Other Store-Based Retailing n.e.c.

TRANSPORT, POSTAL AND WAREHOUSING (DIVISION I)

Subdivision 46 ROAD TRANSPORT

- Group 462 ROAD PASSENGER TRANSPORT
 - Class 4621 Interurban and Rural Bus Transport
 - Class 4622 Urban Bus Transport (Including Tramway)
 - Class 4623 Taxi and Other Road Transport

RENTAL, HIRING AND REAL ESTATE SERVICES (DIVISION L)

Subdivision 66 Rental and Hiring Services (except Real Estate)

- Group 661 MOTOR VEHICLE AND TRANSPORT EQUIPMENT RENTAL AND HIRING
 - Class 6611 Passenger Car Rental and Hiring

Subdivision 67 PROPERTY OPERATORS AND REAL ESTATE SERVICES

- Group 671 PROPERTY OPERATORS
 - Class 6711 Residential Property Operators

ADMINISTRATIVE AND SUPPORT SERVICES (DIVISION N)

Subdivision 72 ADMINISTRATIVE SERVICES

- Group 722 Travel Agency and Tour Arrangement Services
 - Class 7220 Travel Agency and Tour Arrangement Services

ARTS AND RECREATION SERVICES (DIVISION R)

Subdivision 89 HERITAGE ACTIVITIES

- Group 891 Museum Operation
 - Class 8910 Museum Operation
- Group 892 Parks and Gardens Operations
 - Class 8921 Zoological and Botanical Gardens Operation
 - Class 8922 Nature Reserves and Conservation Parks Operation

Subdivision 90 CREATIVE AND PERFORMING ARTS ACTIVITIES

- Group 900 Creative and Performing Arts Activities
 - Class 9001 Performing Arts Operation
 - Class 9002 Creative Artists, Musicians, Writers and Performers
 - Class 9003 Performing Arts Venue Operation

Subdivision 91 SPORTS AND RECREATION ACTIVITIES

- [Group 911 Sports and Physical Recreation Activities](#)
 - Class 9112 Sports and Physical Recreation Clubs and Sports Professionals
 - Class 9113 Sports and Physical Recreation Venues, Grounds and Facilities Operation
 - Class 9114 Sports and Physical Recreation Administrative Service
- Group 912 Horse and Dog Racing Activities
 - Class 9121 Horse and Dog Racing Administration and Track Operation
- Group 913 Amusement and Other Recreation Activities

- Class 9131 Amusement Parks and Centres Operation
- Class 9139 Amusement and Other Recreational Activities n.e.c.

Urban Enterprise

389 St Georges Road,
Fitzroy North, Vic, 3068

(03) 9482 3888

www.urbanenterprise.com.au

