

Experience Victoria 2033

**OUR STRATEGIC PLAN FOR
A THRIVING VISITOR ECONOMY**





Worn Gundidj at Tower Hill

ACKNOWLEDGEMENT OF COUNTRY

The diverse landscapes of Victoria have been the home of, and of significance to, diverse Nations for more than 60,000 years. The First Peoples in Victoria have cared for and nurtured Country throughout this time. The lands and waters on which Victorians and visitors draw enjoyment and inspiration continue to be a living cultural landscape.

We proudly acknowledge the Traditional Owners of the lands and waters throughout Victoria, and we pay our respects to their Elders past and present.

We recognise the rights and aspirations of Victorian First Peoples and acknowledge that First Peoples' Self-Determination is a human right as enshrined in the United Nations Declaration on the Rights of Indigenous Peoples.

Building on this and guided by the 11 principles of First Peoples' Self-Determination, we are working together to enable true self-determination for Victoria's First Peoples through work towards a treaty or treaties with Traditional Owners and Aboriginal Victorians.

Experience Victoria 2033 acknowledges the growing demand for experiences that celebrate Victoria's rich and diverse First Peoples' culture. It encourages greater dialogue with Traditional Owners and the First Peoples of Victoria to ensure initiatives are self-determined and reflect their aspirations and priorities.

LANGUAGE STATEMENT

We recognise the diversity of First Peoples living throughout Victoria. While the terms 'Koorie' or 'Koori' are commonly used to describe First Peoples of South-East Australia, we have used the term 'First Peoples' to include all Aboriginal and/or Torres Strait Islander people in Victoria.

Foreword

**MINISTER FOR TOURISM,
SPORT AND MAJOR EVENTS**



Victoria's got the best of everything and it's getting even better.

We have an incredible, growing visitor economy, built by the family-run and small businesses that form the bedrock of our industry.

We're standing shoulder to shoulder with our regional communities, who have shown remarkable resilience through floods, bushfires and the pandemic.

And at the same time smart investors and operators in the tourism sector are looking to Victoria – Australia's most diverse and dynamic state – for sustainable opportunity and growth.

That's why this plan is important.

Experience Victoria 2033 is a roadmap to help government, businesses and leaders of Victoria's tourism sector plan for growth – and help tourism investors buy into our booming visitor economy.

If you're a part of Victoria's tourism sector, think of the *Experience Victoria 2033* as a blueprint for how government and the tourism sector can work together to maximise the benefits of emerging trends.

Or as a field guide that explains *why* Victoria is the best place for tourism investment, *where* you can invest to take advantage of opportunities, and *how* to invest with minimum fuss.

The thinking behind the *Experience Victoria 2033* is simple. We want to identify potential opportunities, then turn those opportunities into realities that create great experiences for visitors and great jobs for locals.

We've worked hard to reach this point. We went out and listened to hundreds of stakeholders – ranging from businesses to Traditional Owners to tour operators – and developed this plan for action that builds on Victoria's strengths and focuses on opportunities.

Victoria's strengths are formidable. We have everything from deserts to snowfields, beaches to rainforests, wildlife to nightlife, major events to cultural cache. On top of that, we boast the best wine, food, and coffee in the southern hemisphere. And everything is within striking distance of Melbourne.

With this strong foundation in place, Victoria's visitor economy enters an exciting period of growth and prosperity. We look forward to working in partnership with our tourism industry to realise the many exceptional opportunities before us.

Steve Dimopoulos MP
Minister for Tourism, Sport and Major Events

VICTORIA TOURISM INDUSTRY COUNCIL



The pandemic shook visitor economies across the globe – and Victoria was no different. True to the very nature of Victorians, we have come through with determination and passion, and the resilience we've displayed is something as an industry we should be proud of.

Despite the many challenges we've confronted, Victoria is forging a remarkable trajectory of recovery and we now look to the next decade with optimism and greater wisdom from our shared experience. We have established a strong foundation for growth from which to map our course ahead. *Experience Victoria 2033* outlines an important guide for this journey, and I am pleased to support it on behalf of the Victoria Tourism Industry Council.

True to its name, *Experience Victoria 2033* takes an experiential approach to developing our visitor economy and enriching Victoria as one of the world's very best destinations. This plan sets out priorities for product and experience development that our cities, regions, businesses, and communities can align with and implement in ways that underscores their local identity, brand and purpose.

This plan does not shy away from the continuous improvements needed to restore our visitor economy into the competitive powerhouse we know it can be. This includes addressing workforce and accommodation shortages, and better equipping our industry to embed sustainability, accessibility, and inclusivity in everything we do. These guiding principles underpin *Experience Victoria 2033*, and they are critical to our immediate and long-term success.

This plan is a crucial first step on the journey to full recovery of Victoria's visitor economy. Together with our industry, VTIC is committed to our partnership with the Victorian Government in delivering this plan and cementing Victoria as a destination of choice in Australia.

Matt McDonald
Chair, Victoria Tourism Industry Council

Wall to Wall Festival, Benalla



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Setting the scene



Wall to Wall Festival, Benalla

Visitor expenditure across Australia is expected to recover quickly from the recent pandemic, bushfires and floods, growing from \$166 billion to \$230 billion between 2024 and 2030.¹

Victoria is well-placed to lead Australia's growth in domestic and international tourism, following several difficult years of crisis and disasters. Now is the time to create business opportunities and jobs growth across metropolitan and regional areas.

Our intrastate market is strong, and there is strong growth and positive sentiment in interstate and international visitor markets – both of which continue to be attracted by Melbourne's lifestyle, culture and major events, and world-famous natural attractions. These markets also present significant growth opportunities in areas such as wellness, luxury, and nature-based experiences, and First Peoples-delivered tourism.

1. THRIVE 2030: The Re-imagined Visitor Economy, Austrade, 2022.

TRENDS AND OPPORTUNITIES

The visitor economy will be defined by four major trends over the next decade.

The rise in Asian migration

Overseas migration – particularly from India and China – has been the key driver of population growth for Australia for the past decade. The COVID-19 pandemic severely compromised overseas migration, but migration is expected to return as the key driver of population growth. Victoria already has a strong visiting friends and relatives (VFR) market – expected to increase in line with population growth.

Increase in working from home


The increase in working from home has led to several global companies instituting ‘work from anywhere’ policies. This has allowed people to combine work and travel and stay longer in a destination. With the right settings, such as accommodation with workspaces and strong connectivity, there is an opportunity for regional Victoria to attract long-stay visitors and digital nomads.

Conscious consumers

Travellers are increasingly looking for authentic brands that align with values such as sustainability, inclusivity and diversity, and action towards Treaty. They want to connect with nature, First Peoples culture, and local people, and eat local produce. With action on Treaty and progress towards net zero emissions, alongside a strong social enterprise sector, Victoria is well-placed to be front-of-mind for the conscious consumer segment.

Nature-based tourism

Research has consistently shown the importance of nature-based tourism. Importantly, nature-based tourism did not experience any decline during the pandemic. With Victoria’s compact geography and diversity of nature, we have a significant opportunity to grow our reputation for nature-based tourism.

A photograph of a man and a woman standing outdoors, looking at a map together. The woman is on the left, wearing a red and blue plaid shirt, and the man is on the right, wearing a green shirt. They are both looking intently at the map. The background shows a rocky, natural landscape with a waterfall in the distance.

Splitters Falls, Grampians

There is a significant opportunity to respond to these trends and address market gaps by:

- Developing new engaging experiences for visitor participation and spending, such as new nature-based and First Peoples' tourism products
- Creating premium accommodation in suitable natural settings
- Expanding on strengths (such as extending creative and culinary strengths further into regional areas) and specialisations (such as expanding our thermal and mineral springs and bathing to incorporate wellness and luxury experiences)
- Supporting longer stays through evening attractions and connected experiences and trails
- Encouraging growth in existing markets and experiences by modernising and expanding them, including in the broader visitor economy such as hospitality, design, retail and sport
- Expanding service excellence to every experience.

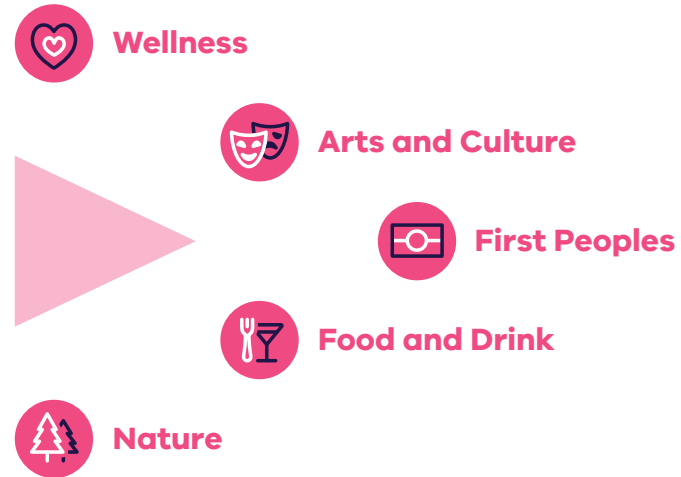
Peninsula Hot Springs, Fingal



HOW WILL WE GET THERE?

Experience Victoria 2033 will ensure Victoria maximises growth opportunities in the visitor economy between 2023 and 2033.

Experience Victoria 2033 will drive, enable and guide investment in high-quality products and experiences across **five product priorities**.



VISION

We will work together to make Victoria a leader in the delivery of exceptional, diverse, and connected experiences for visitors.

We will invest in bold, innovative, and inspiring tourism products and experiences that attract more visitors to come to Victoria, stay longer, and spend more.

We will ensure Victoria maximises the social and economic benefits of domestic and international tourism.

We will – by creating a strong, resilient visitor economy – build a prosperous, sustainable future for Victoria.



Rising 2022 Seeing is believing but feeling is the truth by Paul Yore

Why Victoria



Johnny Baker's, Castlemaine

THE SECRETS OF OUR SUCCESS

Oxford Economics estimates international leisure travel to Victoria will more than double from around 980,000 visitors in 2022 to a baseline of 2.6 million in 2024.

Given past performance, that estimate is conservative. After all, before the pandemic:

- Victoria's share of international tourism was growing faster than any other state in Australia
- Melbourne was the most popular destination in Australia for short-stay visitors from interstate
- Regional Victoria was the most popular destination for short-stay visitors from Melbourne.

Here is why Victoria is primed for success.

We are Australia's fastest growing visitor economy

Victoria's visitor economy is one of the strongest and most diverse in Australia.

Prior to the pandemic, we had Australia's fastest growing visitor economy and Melbourne was the number one destination for domestic visitors and among the most popular destinations for visitors from China, India, the United Kingdom, and the United States. In addition, the state's visitor economy supported 259,000 jobs and contributed \$29.4 billion to Gross State Product.

Tourism spend in Victoria is expected to return to 2019 levels in 2023 – then keep growing over subsequent years.

Demand forecasts show Victoria's brand is strong and that the state continues to be a premium, desired destination for interstate and international visitors.

Victoria's tourism sector has an even mix of domestic and international markets, with intrastate, interstate, and international markets each accounting for roughly a third of visitor expenditure. All three markets have short- and long-term growth opportunities for leisure and business travel.

One of the advantages of Victoria's mixed market portfolio – with tourism ranging from business to education to leisure, and from intrastate to interstate to international – is that it minimises seasonal peaks and troughs and mitigates risk from unforeseen global and local shocks, including climate events.

With visitation returning, destinations with compelling experiences, events and infrastructure have the potential to capture more market share than before.

Experience Victoria 2033 will ensure Victoria's destinations keep offering the very best of everything.



2018-19¹
\$29.4 billion GSP

6.4% of Victorian economy

259,000 jobs

9.1% growth in GSP year on year

80-90% hotel occupancy rates in Melbourne,
60-70% in regional Victoria

26 million passenger movements
through Melbourne Airport

1. State Tourism Satellite Accounts, Tourism Research Australia, 2022

We have a strong, reliable domestic market

Pre-pandemic, domestic tourism represented 97 per cent of visitors and 73 per cent of expenditure in Victoria. There is high demand for regional experiences from Melburnians, as well as visits to Melbourne from regional Victorians to see friends and family and attend events.

Domestic overnight spend in regional Victoria continues to grow above pre-pandemic performance, with the year ending September 2022 35 per cent above September 2019. Intrastate overnight travel has led this recovery, with interstate tourism also increasingly normalising and expected to grow steadily through 2023.

We're well-placed to welcome international travellers

Victoria has two international airports. Melbourne is Australia's second busiest airport, and Avalon is an important gateway to Geelong, the Great Ocean Road and the Surf Coast. In the year ending December 2019, more than 3.1 million international visitors came to Victoria and spent \$8.8 billion.

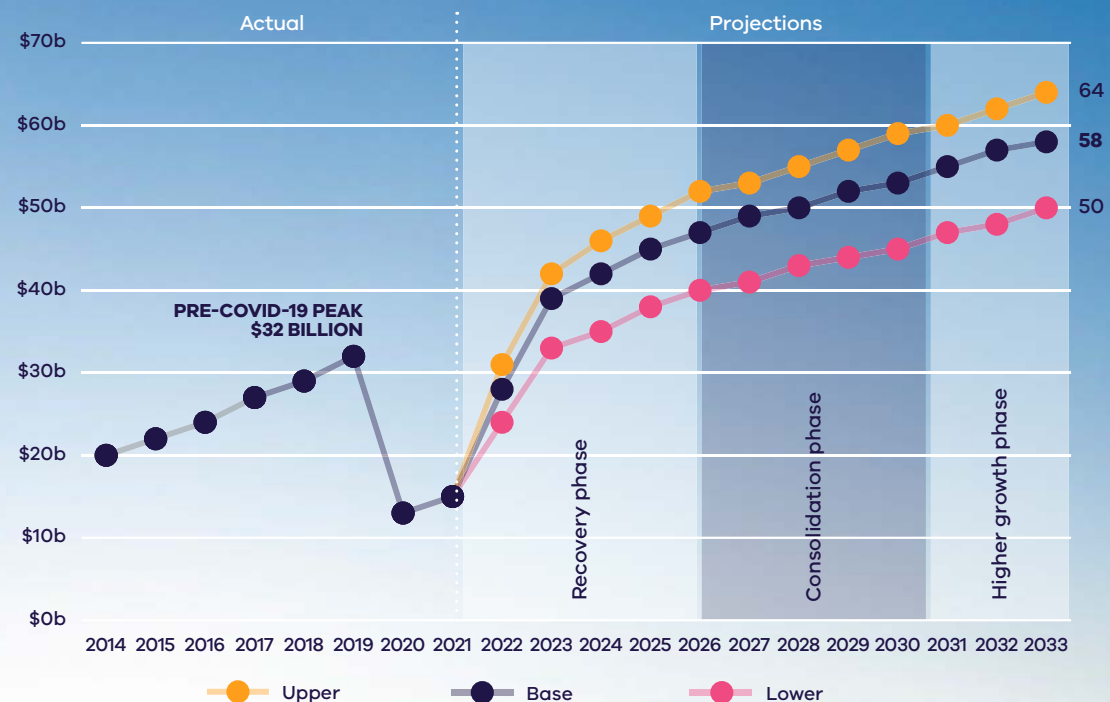
Post-pandemic, we are seeing the rapid return of international airline capacity in key markets as well as growth of new and emerging markets such as India. With plans for a third runway and redevelopments to improve the visitor experience at Melbourne Airport, Melbourne and Victoria are well-positioned to welcome the return of international visitors.

We're rebuilding visitor economy growth

Victoria's visitor economy is projected to achieve total tourism spend of \$58 billion by 2033.

Visit Victoria – the state's tourism marketing and events agency – is helping drive this growth. Inspiring awareness and conversion campaigns, major and business events, and business readiness programs create visitor demand for Victoria and convert intention to visitation.

Total Tourism Expenditure in Victoria Potential Growth Projections



Little Desert National Park

We have competitive advantages

Victoria's brand proposition, **Enrich every moment**, highlights our unique point of difference.

Every part of the state and every month in the calendar have attractions and events to cater to a wide range of domestic and international visitors.

Melbourne – renowned as one of the world's safest, most liveable and friendly cities, and Australia's best student city – is a magnet for business and lifestyle travellers who come to experience sport, live music, culture, street art, laneways, food, fashion, and retail.

Beyond Melbourne, visitors can quickly reach world-class destinations such as Phillip Island and the Mornington Peninsula, Geelong and the Bellarine, the Great Ocean Road, Daylesford and the Macedon Ranges, Ballarat, Bendigo, the Dandenong Ranges and the Yarra Valley.

For longer stays, travellers can experience regions such as the Goldfields, the High Country, Gippsland, the Wimmera, the Murray and the Goulburn Valley – experiencing everything from surf to snowfields to rainforests to deserts – reflecting Victoria's compact and diverse geography.

We have world heritage sites

Victoria has two of Australia's most unique world heritage sites – with one being the birthplace of the Australian nation and the other the cradle of First Peoples' ingenuity.

Our first world heritage site – the Royal Exhibition Building and Carlton Gardens – is the birthplace of the Commonwealth of Australia. The opening of the first Parliament of the Commonwealth of Australia was held in the Royal Exhibition Building on 9 May 1901.

Victoria's second world heritage site – the Budj Bim Cultural Landscape in the volcanic lands of the Gunditjmara people – is one of the earliest and largest Indigenous aquaculture ventures in Australia, created and used for thousands of years to systematically farm eels for food and trade.

In addition, Victoria has 28 national heritage sites, including the Ned Kelly country of Glenrowan, the Echuca Wharf, the Great Ocean Road, the Melbourne Cricket Ground, and the Coranderrk Aboriginal Reserve.

Melbourne is famous as one of the world's safest, most liveable and friendly cities.



Dean Stewart Aboriginal Tours and Education, Yarra River, Melbourne

We host world-class major events

Victoria's major events calendar is a significant competitive advantage.

From the city to the suburbs to the country, we stage events all year round. As well as the world-renowned Spring Racing Carnival, Melbourne is the only city in the world to host both a tennis Grand Slam and a F1 Grand Prix.

In 2018, Victoria's major events calendar attracted more than 700,000 visitors (total attendances of 6.9 million) and contributed more than \$2.5 billion in economic benefit to the state.

Since then, we have turbo-charged our enviable events calendar to boost Victoria's position as the home of major events in Australia.

Our events calendar extends well beyond the borders of Melbourne, with support for an array of events across the state, including at the Bendigo Art Gallery, Phillip Island, Geelong, Ballarat, and the new Shepparton Art Museum.

Visit Victoria is working with our regions to develop a sustainable calendar of regional events that showcases Victoria's key regional tourism strengths – building on our reputation as an events destination.

We are a market leader in conventions

Victoria is a market leader for business events in Australia.

In 2018-19, business events contributed \$12.6 billion to the Victorian economy and supported more than 84,000 jobs, with international delegates spending up to \$1,019 per day.

Record investment in the sector – including at the Melbourne Convention and Exhibition Centre (MCEC) and Centrepiece at Melbourne Park – has increased Victoria's capacity to host even more events. The completion of the Geelong Convention and Exhibition Centre will add even more capacity in regional Victoria.

Victoria is well placed to capitalise on the return to conventions. We are also well-placed to deliver hybrid events with significant investment in facilities enabling participants to join online or in person.



Australian Open, Melbourne

We're targeting lifestyle leaders and high-value travellers

Victoria's key target markets for demand-driving marketing activity are High-Value Travellers (HVTs) in international markets and Lifestyle Leaders in the domestic market.

HVTs are empowered and increasingly knowledgeable about the world around them. HVTs view knowledge about a destination as fundamental to an enriching travel experience. HVTs prefer authentic holidays where they experience the local culture and everyday life. They want to experience everything from the local cuisine to the natural surroundings.

Lifestyle Leaders represent more than 30 per cent of the Australian population (5.95 million Australians). They are professionals or managers and have an average annual household income of \$130,160. They spend more when they travel and travel more than the average population. They like to shop, particularly online, and are open to trying new things. When they travel, they like to stay active, experience the local culture and see nature. They are less likely to prefer to have their trips organised for them.

Lifestyle Leaders and HVTs can be leisure tourists, working-holiday makers, visiting friends and relatives, or business travellers.

In focusing on these key target markets we aim to attract key groups that will deliver high yield and benefit us all. Of course, we'll also continue to focus on travel options that appeal to everyone, including city dwellers who want to get out into country Victoria, and Regional Victorians heading to Melbourne – we want to showcase Victoria to Victorians as much as the rest of the world.

We're planning and investing for growth

The Victorian Government is already investing for growth across Victoria through more than \$300 million of investment in regional tourism infrastructure – as well as securing and staging world-class major events such as the Australian Open and *Harry Potter and the Cursed Child*.

In addition, the Government is working with the City of Melbourne to support its recovery and growth through the \$200 million Melbourne City Revitalisation Fund.

Experience Victoria 2033 will help coordinate and facilitate current and future investments. By 2033, we want Victoria to be recognised for bold and innovative tourism products that attract visitors from across Australia and overseas. Interstate and international visitors will come to Victoria for attractions such as nature-based experiences in eastern rainforests, iconic coastal scenery in the south-west, signature food and wine destinations in the north-east, Lake Tyrrell and the Silo Art Trail in the north-west, and adventure sports on the Murray River.

We want Victoria to be recognised for bold and innovative tourism products.



National Gallery of Victoria, Melbourne

Product priorities



Sky High, Mt Franklin

Harnessing our competitive advantages

Domestic and international tourism are steadily recovering from the impacts of the COVID-19 pandemic. With borders reopening, international travel is expected to return to long-term growth trends by 2025-26. There are sustainable opportunities for growth in international tourism (leveraging the growth in Asian markets such as India), interstate tourism (promoting Melbourne as a short-break repeat-visit destination), and intrastate tourism (encouraging more Melburnians to make an overnight trip to regional Victoria).

CASE STUDY

Gunya Yanakie Nanjet Brautalung

The Gunya Yanakie Nanjet Brautalung project supports the creation of a culturally vibrant gateway to Wilsons Promontory National Park on the southernmost tip of mainland Australia.

The project will deliver a feasibility study, business case, conceptual designs and an investment prospectus for high-profile and regionally significant tourism opportunities across 103-hectares of land purchased by the Gunaikurnai Land and Waters Aboriginal Corporation.

As part of the initiative, 150,000 indigenous tree species will be planted, regenerating habitat and landscapes while protecting the area's cultural and environmental values.

The project will also develop place-based cultural information products, which will enhance the visitor experience in the Gippsland region and support long-term economic and employment outcomes for First Peoples.

The project is being delivered with support from the Victorian Government's Enabling Tourism Fund.

Here are the product priorities that we will focus on to drive growth.



1. First Peoples-led experiences

Visit to connect

Victoria's commitment to Treaty is an opportunity to recognise and celebrate the unique status, rights, cultures and histories of Traditional Owners and Victorian First Peoples.

Integral to Treaty is the acknowledgement that all Victorian tourism is on First Peoples' land. Acknowledging this, tourism and the visitor economy have a role to play in promoting culture and building understanding of, respect for, and learning from First Peoples' stories and traditions.

More will be done to support the self-determination of First Peoples as they develop visitor economy products and build Victoria's profile in the market. In 2019, 459,000 visitors to Victoria participated in a First Peoples activity, spending \$1.1 billion. However, visitor participation in Victoria was low (7 per cent) compared to the national average (17 per cent). This indicates there is enormous potential for growth.

Aboriginal Heritage Walk,
Royal Botanic Gardens, Melbourne



CASE STUDY

Yuma Yirramboi – Invest In Tomorrow

Yuma Yirramboi is the Victorian Aboriginal Employment and Economic Strategy. The Woiwurrung words mean 'Invest in Tomorrow', with the strategy outlining a long-term vision and sustained, coordinated approach to increasing the wealth and prosperity of Victoria's First Peoples.

Yuma Yirramboi recognises that First Peoples' culture, knowledge and practices are the most important assets in a thriving First Peoples economy. The strategy also acknowledges the value of First Peoples culture as a competitive advantage and point of difference for First Peoples businesses and organisations.

The visitor economy can support the *Yuma Yirramboi* Strategy by:

- acknowledging and protecting First Peoples cultural and intellectual property
- providing meaningful career pathways
- increasing support for First Peoples entrepreneurs and businesses including improved access to capital, information and expertise, as well as social procurement
- working with First Peoples communities, businesses and peak bodies to promote co-investment opportunities
- setting an expectation of cultural safety.

What we are doing now

The Victorian Government has funded a self-determined First Peoples Tourism Plan, which is currently in development. The plan will be First Peoples-led and follow the principles of self-determination.

The Government is also supporting the development of First Peoples' tourism products. This includes the revitalisation of the Brambuk Cultural Centre, the Welcome to Dja Dja Wurrung Country project at Castlemaine, and the Budj Bim Master Plan update, comprising additional capital construction works and a strategic investment plan which will identify key funding opportunities beyond current infrastructure investment.

Future opportunities

We will continue to support self-determination and capacity building of First Peoples' communities and businesses through the development of the First Peoples Tourism Plan aligned with the *Yuma Yirramboi* strategy. This will include consideration of the best model and structures to grow and promote a sustainable First Peoples tourism industry now and longer-term.

We'll also promote cultural safety across the broader industry and the use of traditional place names across the state, in marketing, signage and interpretation.

Koorie Heritage Trust



CASE STUDY

Phillip Island Hot Springs

Nestled within a scenic coastal environment, the Phillip Island Hot Springs will be Victoria's latest nature-based health and wellbeing attraction. The facility will sit beside celebrated regional produce restaurant, the Cape Kitchen, to create a luxury wellness and dining experience.

The Phillip Island Hot Springs project establishes an additional seven pools in the main bathing area and a further three ocean-view pools. A relaxation dining area expands the Cape Kitchen's amenities for a further 100 guests. The new development will help position Victoria as an outstanding destination for wellness tourism while celebrating our uniquely Victorian natural advantages.

The project is supported by the Victorian Government's Regional Tourism Investment Fund.



2. Wellness

Visit to recharge

Victoria is well positioned to attract visitors seeking a wellness experience, with our existing offerings such as natural mineral springs in Daylesford and our coastal thermal water destinations.

Currently, our wellness industry only serves a small percentage of the total available market. There is significant room for growth. In addition, other wellness industries – such as mindfulness retreats and wellness resorts – could be developed for broader offerings and longer stays.

Prior to the pandemic, global wellness travel was forecast to grow at twice the rate of average tourism growth, jumping from \$639 billion in 2017 to \$919 billion in 2022.

To compete globally, Victoria needs to develop more luxury products and improve collaboration across the sector to establish connected experiences.

Peppers Springs Retreat, Hepburn Springs



What we are doing now

The Victorian Government is investing \$500,000 to support the planning stage of the Cape Woolamai Lodge and hot springs. This project is expected to boost visitation to Phillip Island by 73,000 visitors a year – injecting an additional \$4.7 million into the local economy. Government funding is also being provided to support the expansion of Peninsula Hot Springs and deliver enabling infrastructure for Metung Hot Springs in East Gippsland.

Future opportunities

We will work with industry to make it easier for current and prospective wellness operators to enter the Victorian market.

We will work with wellness operators and peak bodies to showcase and market Victoria's unique bathing offering.

We will also take steps to better connect wellness experiences with other product priority areas, for example food, arts, sports and business events.

Beauchamp Falls



The Sebel, Yarrowonga



CASE STUDY

WAMA – Where Art Meets Nature

The WAMA project delivers Australia's first art and environmental precinct with a state-of-the-art climate-controlled gallery showcasing Australian and international works inspired by nature.

Located in the Grampians region, the gallery will be developed among restored native bushland, wildlife and native botanic gardens – blending art with the environment for a truly extraordinary visitor experience that celebrates the signature personality of the Grampians.

Interpretive signage, garden paths, informal gathering places and facilities for workshops and events add to this immersive cultural and nature-based experience.

The project is supported by the Victorian Government's Regional Tourism Investment Fund.



3. Arts and Culture

Visit to create

Victoria has world-class galleries, performing arts, creative events and the best live music scene in Australia.

Our art, culture, built heritage, and design are world-renowned, and we regularly attract international and blockbuster exhibitions, productions and events. In 2019, 12 per cent of all visitors to Victoria had a cultural experience, while our galleries hosted more than nine million attendees. In addition, Victorian live performances attracted audiences of more than seven million, generating more than \$600 million in revenue.

Our UNESCO Creative Cities of Ballarat, Bendigo, Melbourne, and Geelong are thriving hubs of innovation and creativity. Smaller regional cities and communities, such as Shepparton, Castlemaine, and the silo towns of north-west Victoria, have become destinations for art and cultural experiences.

There are opportunities to grow the visitor economy in these existing areas, to extend arts and culture experiences to accommodation, such as boutique art hotels and repurposed heritage buildings, and to create new experiences across multiple locations. Victoria's world-class content creators should be supported to tell their stories across the state and grow Victoria's brand as Australia's home of arts, culture, and live performance.

Takeawei Ceramics, Torquay



CASE STUDY

Geelong Arts Centre

The new Geelong Arts Centre will become one of the country's largest regional arts centres with a 500-seat theatre that increases to 800 for live gigs, as well as a hybrid theatre, black box theatre and outdoor atrium. It will expand on Geelong's ability to host local, national and international performers, attracting visitors as well as creating 300 ongoing local jobs.

The centre has been co-designed with the Wadawurrung Traditional Owners Aboriginal Corporation to weave stories of the lands, waters and skies, and local minerals into the architectural design. The centre's design further builds on Geelong's unique sense of place by also linking to Geelong's modern history through wool store-inspired moulded concrete walls.

The project is supported by Creative Victoria.

What we are doing now

The Victorian Government is investing \$288 million through Creative State 2025 to support First Peoples' products and experiences, creative neighbourhoods, and innovative content, as well as the live music sector and UNESCO Creative Cities. With an emphasis on First Peoples' products and creativity and the importance of having cultural experiences in every part of the state, *Creative State 2025* is also the platform for growth in cultural tourism. Our investments in creativity recognise that local actions, such as supporting creative neighbourhoods, content creators, infrastructure and facilities, contribute to visitor experiences and economic development as much as they do to community life.

The Melbourne Arts Precinct Transformation project is transforming the central arts precinct into an iconic creative and cultural destination – investing in the cultural infrastructure and major performing arts organisations, as well as attracting international touring events and exhibitions.

We are continuing to curate major events anchored in arts and culture to attract visitors from interstate and overseas through the Major Events Fund and Regional Events Fund.

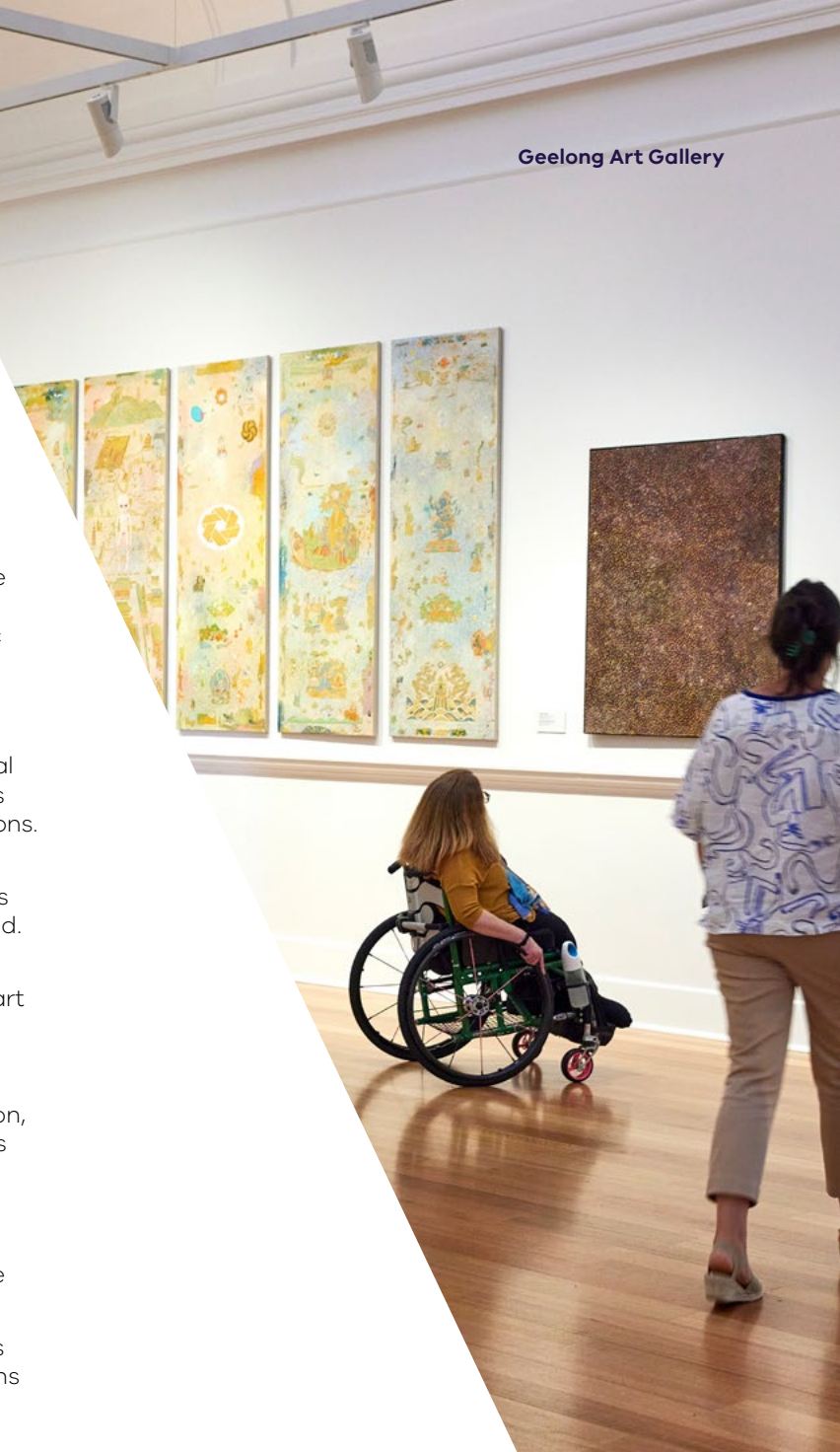
The Government's Regional Tourism Infrastructure Fund and Enabling Tourism Fund are also supporting regional art products, such as the Mallee Silo Art project.

Future opportunities

We'll complete the Melbourne Arts Precinct Transformation, strengthening Victoria's position as a leading global arts and culture destination.

We'll keep leveraging the investment in *Creative State 2025* by continuing to create major new exhibitions and experiences at our galleries, museums and performance venues in Melbourne and in the regions.

We'll also drive the growth of new cultural centres across Victoria with support for creative attractions, installations and performance.



CASE STUDY

Helen & Joey Estate

The Victorian Government is supporting the development of unique tourism and accommodation offerings in the Yarra Valley region with a \$3.5 million investment through the Regional Tourism Investment Fund towards the Helen & Joey Estate.

The project will deliver 16 luxury hotel-style apartments, a new tasting and retail space, 110-seat restaurant, 20-seat private dining and meeting room, and newly landscaped gardens, enabling a full food and wine tasting and sales experience.

The redevelopment is expected to double visitation capacity and create 110 ongoing jobs, providing a considerable boost to the local economy.

The refined dining experience at Helen & Joey will strengthen the region's distinct food and wine brand by combining farm-grown and made wines and food produce with regional ingredients unique to the Yarra Valley.



4. Food and Drink

Visit to feast

Victoria is the food bowl of Australia, with a strong reputation for food, wine and craft brewing and distilling. We're home to globally recognised restaurants that showcase our top quality foraged and farmed produce. As one of the most multicultural communities in the world, we also produce a rich tapestry of Asian, Pacific and European culinary experiences, as well as our emerging native foods sector.

Our greatest strength is our clean, green produce, as well as our connection to place and the people that produce our food. Our world class chefs cook and create from the best of our productive fields, waterways and seas – which range from the irrigation lands fed by the mighty Murray in the far north-west to Werribee's vegetable producing irrigation district in Greater Melbourne and Mallacoota's abalone in the far south-east. Our wine regions are world famous, and our craft brewing and distilling are award winning.

Emerging agritourism experiences are enabling our primary producers to diversify and future-proof the industry, and providing more opportunities for visitors to explore and enjoy our first class produce.

Royal Mail Hotel kitchen garden, Dunkeld



CASE STUDY

Drink Victorian

The Drink Victorian pilot program celebrates Victoria's world-class wines, spirits, beers, ciders and non- and low-alcohol beverages. Inviting over 100 bars, restaurants, retailers and licensed venues to stock locally made drinks, the program also connected nearly 400 producers with businesses and consumers through marketing, education and communications to showcase exceptional drinks and the creative people behind them.

As a result of the six month pilot, intention to purchase Victorian refreshments increased for both consumers and businesses by more than 12 per cent. Victorian refreshments will continue to be promoted at events, such as the Melbourne Food and Wine Festival, and through invenue offers to raise their profile and grow demand for the responsible enjoyment of Victoria's high-quality drinks.

The program is jointly supported by the Victorian Drinks Alliance, Agriculture Victoria and Global Victoria.

What we are doing now

The Victorian Government is supporting producers, such as the Little Lon Distillery in Ballarat and Rutherglen's All Saints Estate Cellar Door and Restaurant, through the Tourism Infrastructure Program – Flagship Projects and the Regional Tourism Investment Fund. In addition, we are supporting small-scale and craft agribusinesses with grants to create unique visitor experiences through the Small-Scale and Craft Program, as well as support through the Drink Victorian Program and the \$10 million Distillery Door Program by Agriculture Victoria.

And, in an Australian first, the Government has supported Victoria's Federation of Traditional Owner Corporations to develop a *Native Foods and Botanicals Strategy*. This strategy will support First Peoples-owned businesses and organisations to develop a thriving local native foods industry.

Future opportunities

We will work with stakeholders to showcase our clean, green Victorian produce and make it easier for producers to make the leap into agritourism.

We will collaborate with organisations such as Food and Drink Victoria, using events to promote our produce, dining and innovative drinks scene.



CASE STUDY

Great Ocean Road Coastal Trail

The Great Ocean Road Coastal Trail will deliver a new world-class trail experience, stimulating economic benefits to local towns and communities through increased visitation, as well as improved amenity and wellbeing for residents.

The Victorian Government is supporting the development of this outstanding nature-based flagship project through the Tourism Investment Program.

This investment will deliver the planning and design of the trail from Fairhaven to Skenes Creek, construction of the walking trails from Fairhaven to Grey River, as well as five proposed suspension bridges and other associated infrastructure such as signage, car parking, day visitor facilities and campgrounds.

The 90 km coastal trail will become a significant leading tourism asset along the Great Ocean Road, opening up previously unseen views of the breathtaking limestone cliffs. It will also link communities along the coast, supporting local businesses by encouraging longer stays and increased daily spend beyond the peak summer period.



5. Nature

Visit to find yourself

Victoria's nature-based offerings are a significant attraction for visitors, with 19 per cent of all visitors in 2019 drawn by nature-based experiences. Victoria's geography – compact and diverse – means that visitors can land in Melbourne and spend time in the mountains, the desert, and the coast within a short week or a long weekend.

There is enormous potential for growth in this market once nature-based experiences are better connected, made to suit all abilities, and supported by appropriate infrastructure. Any development in this area must prioritise and protect the environment, ensuring visitors leave nature-based attractions in a better state than when they arrived.

There is also opportunity to sustainably grow visitation to Victoria's waterways, bays, lakes, rivers, and water storages through a range of on-water and active recreation activities.

Victoria's deserts and wetlands are largely untouched. Expanding visitation sustainably and responsibly into these areas is an opportunity to establish Victoria as a national leader in diverse experiences in natural environments.



CASE STUDY

PS Australian Star

The PS Australian Star will provide Australia's first five-star river cruise experience, drawing more visitors to Victoria's mighty Murray. The state-of-the-art paddlesteamer will offer guests a unique stay, with 20 ensuite cabins, a fine dining restaurant and function space, along with a lounge and bars across two levels. Built locally in Mildura and operating from Echuca, the vessel will offer visitors a luxury cruise up the Murray, with the opportunity to explore riverside communities.

The project supports a 'do more and stay longer' ethos, increasing average length of visitor stays to 4.5 nights and supporting local businesses throughout the Echuca region.

The paddlesteamer is being developed by Murray River Paddlesteamers, with support from the Victorian Government through the Regional Tourism Investment Fund.

What we are doing now

The Victorian Government is developing a Nature-Based Tourism Plan to sustainably grow nature-based tourism and enhance the resilience of the sector through practices that will enhance our exceptional natural places and support the wellbeing of communities and visitors to our state.

We are also supporting master planning for the Shipwreck Coast, You Yangs and Alpine Resorts, and creating new national parks in Victoria's central west.

In addition, we're supporting the revitalisation of Wilsons Promontory National Park, and establishing the Grampians Peaks Trail, Falls to Alpine Crossing, and the Great Ocean Road Coastal Trail through the Regional Tourism Infrastructure Fund and Flagship Projects.

The \$105.6 million Victoria's Great Outdoors program supporting improved nature-based visitor experiences by upgrading campgrounds, walking trails, and 4WD tracks.

Future opportunities

We'll super-charge the sector by promoting outdoor adventure activities and eco-tourism experiences that build appreciation of our extraordinary natural advantages.

We'll facilitate investment in nature-based infrastructure, accommodation and visitor facilities in suitable areas.



Getting the settings right

Working together to plan for growth

Victoria has the potential to become Australia's number one state for domestic and international visitors by 2033.

We've got everything we need to grow and succeed – including our great people and places, as well as our diverse and accessible geography. To support this, we will work with industry to ensure the right conditions and settings are in place.

Adnate, Paint Up Project, Hosier Lane, Melbourne

CASE STUDY

Ballarat Hospo Heroes Hospitality Staff Training Series

The Victorian Government has supported Ballarat Regional Tourism to upskill new and younger hospitality workers in the Central Highlands region.

More than 150 staff received hands-on training from local hospitality leaders – including Mitchell Harris Wines, Johnny Alloo and Peter Ford Catering – in the areas of coffee-making, beer, wine, cocktail making and event service. Participants came away with improved specialist product knowledge to deliver an enhanced customer experience and higher standard of service.

The training series also built camaraderie amongst enthusiastic hospitality professionals and helped to promote hospitality as a career by offering professional development opportunities.



1. Workforce

Our goal is to build a highly skilled, local workforce

Together we will:

- make the visitor economy more respected and valued as an employer by improving working conditions
- work with the Commonwealth Government on matters such as migration, visas and working conditions that support the visitor economy workforce
- connect employers to employment support programs
- learn from young people to understand the needs and preferences of our emerging workforce
- work with education and training providers to develop skills and training options that inspire prospective workers to pursue a career in the visitor economy
- celebrate and engage our diverse local communities as an untapped workforce
- forge personalised, inclusive and supported connections between employers and Victorians who are looking for work
- work with employers to understand their workforce and skills needs.



CASE STUDY

Stay Close, Go Further

To encourage Victorians to experience more of what our state has to offer, Visit Victoria developed the Stay close, go further campaign. The campaign highlights the creativity, culture and beauty of regional Victoria through its people and connects to the notion of 'staying close' (travelling within Victoria) and the opportunity to 'go further' into new areas and discover something new. It also targets visitors from nearby areas of New South Wales and South Australia.

The campaign also highlights the distant regions via dedicated television commercials for regions Gippsland, The Murray, High Country, Great Ocean Road and Grampians.

Fifty-three per cent of Victorians recalled seeing the campaign and 71 per cent are more likely to consider a trip to regional Victoria as a result of seeing the campaign. (Hall & Partners campaign tracking)



2. Drive demand

Our goal is to inspire travellers to visit and return

Together we will:

- develop an overarching statewide destination brand framework that clearly outlines Victoria's unique point of difference
- continue to attract the best major and business events and capitalise on these to extend length of stay and disperse visitors across the state through integrated destination marketing
- create inspiring campaigns that reach mass audiences and challenge preconceptions of what Victoria has to offer and put more Victorian destinations and experiences on the bucket list
- drive conversion via marketing, campaigns and industry and media partnerships.

CASE STUDY

Bamboo Airways

Melbourne is continuing to grow direct airline routes, becoming the Australian headquarters of Vietnam's Bamboo Airways. The airline launched a service between Melbourne and Ho Chi Minh City in early 2022 before adding a second route, to Hanoi, only a couple of months later.

The service is the first direct flight between Melbourne and Hanoi, and the arrival of Bamboo Airways will help Victoria's Vietnamese community welcome their friends and family to Victoria, as well as support the state to attract Vietnamese visitors and international students.



3. Aviation and Transport

Our goal is to make it easier to get into and around the state

Together we will:

- re-establish and grow direct airline routes into Melbourne to connect Victoria with key markets
- work across government to enhance the visitor experience in transport projects and regional connectivity initiatives
- work with businesses, local government and suppliers to support the electrification of transport
- assess opportunities for growing the Victorian cruise shipping sector and continue to upgrade local port infrastructure to support tourism
- continue to improve wayfinding, branding, and accessibility on transport routes with high visitor economy potential.



4. Investment and Project Facilitation

Our goal is to enable great ideas and projects

Together we will:

- elevate awareness of priority tourism projects across existing and proposed planning strategies and policies, and investigate opportunities to support demand-driving tourism projects as part of the Victoria Planning Provisions
- document existing planning pathways available to investors and developers, and identify new planning pathway opportunities for tourism projects
- develop a toolkit of resources that enables proponents to make informed decisions through the investment lifecycle.



5. Industry Excellence

Our goal is a strong and resilient industry

Together we will:

- work with the education and training sector to ensure tourism and hospitality businesses and workers have access to the skills they need to succeed in the modern visitor economy
- reduce red tape that hinder new business ideas and innovations
- connect industry to resources to increase knowledge of, and ability to attract and service, new and emerging markets including CALD visitors and those with accessibility requirements
- work with existing programs and providers to support businesses to increase sustainability efforts, reduce waste, and adopt nature-positive practices
- strengthen the regional tourism network through the establishment of Visitor Economy Partnerships that support regional businesses to grow, adapt and respond to opportunities
- support discussions on metropolitan governance for the tourism industry.



CASE STUDY

Visitor Economy Community Engagement Pilot Program

The Victorian Government is supporting local councils to engage with residents to promote the value of tourism to local communities. The pilot program will enhance the way locals understand their community as a destination for visitors.

Three councils have been selected for the pilot and will be guided by community engagement specialists to use IAP2 certified engagement practices to improve community sentiment, provide licence to operate for tourism businesses, and foster the growth of tourism products that reflect local values.



6. Digital connectivity

Our goal is to have a modern industry with a strong online presence and service

Together we will:

- connect businesses with digital capability-building programs such as those run by Business Victoria
- ensure the \$626 million Victoria's Digital Future Now program considers tourism destinations for upgraded broadband access and mobile connectivity.



7. Community Engagement

Our goal is to use tourism to empower local communities

Together we will:

- support local government and industry to engage with communities to deliver tourism initiatives
- support communities to understand the value of the visitor economy and influence local projects to make sure the visitor economy benefits them and reflects their aspirations.



8. Visitor Servicing

Our goal is to deliver high quality, connected and personalised visitor servicing when and where visitors need it

Together we will:

- ensure visitor servicing is customer centric, high quality, on-brand and streamlined across in-person and online touch points
- collaborate on visitor servicing approaches and solutions to ensure current and future visitor needs are met and exceeded
- tailor training and skills for the visitor economy workforce to ensure positive visitor experiences, reinforce demand and inspire return visits.



9. Data and Insights

Our goal is to be ahead of trends

Together we will:

- work in partnership with the Commonwealth to coordinate research and data insights, ensuring it meets industry needs all over Victoria
- deliver enhanced insights and improved data access incorporating new leading-edge data tools, delivering better information to assist decision-making.



What does success look like?



De Bortoli Wines, Yarra Valley

Experience Victoria 2033's outcomes are designed to focus the actions of all stakeholders in the sector – including investors, operators, state and local government agencies, and tourism boards.

We will use the outcomes to define what success looks like for the industry and set the standards for how we should go about achieving that success.

By 2033, we want a visitor economy that is:

Driving economic growth

Victoria's visitor economy attracts more visitors to our state who stay longer, produce higher yield, and be more likely to return. Our visitor economy provides more secure jobs for Victorians, and a stronger economic contribution to Victoria.



Unique to place

Our tourism products build on the different signature personalities of our suburbs, towns, cities and regions. Victoria has strong global, domestic and local brands.



Innovative and outstanding

Victoria pushes the boundaries and transforms original ideas into brilliant businesses, exciting products and events and ultimately, a richer experience for visitors. Victoria's visitor economy receives recognition for leading and new products, experiences and attractions. Our industry is customer-centric and has improved digital capability.



These seven guiding principles will inform decision making and how we measure success.

Valuable for our communities

Our tourism investments align with the plans and aspirations of local communities and generate positive benefits for local communities. Communities have a positive sentiment towards tourism in Victoria and act as ambassadors for our visitor economy.



Sustainable and regenerative

Victoria's visitor economy creates experiences that stand the test of time by protecting and enhancing our extraordinary landscapes and biodiversity. Our industry adopts more efficient and environmentally sensitive practices and technologies to support our path to net-zero emissions, invests in climate resilience, and meets standards for environmental certification of products and services.



First Peoples focused

Victoria's First Peoples are self-determining their priorities for tourism development, creating wealth and contributing to positive outcomes for their communities and Country. First Peoples' businesses are industry leaders, with partners supporting their success. Visitors have more opportunities to connect with and learn from First Peoples' culture and knowledge.



Inclusive and welcoming

Victoria's visitor economy delivers meaningful experiences and employment for people of all identities, cultures and abilities. Our visitor economy employs, and is led by, people of all backgrounds. We are welcoming more visitors of diverse backgrounds and have increased our ability to cater for a range of access needs.



Creating Victoria's future success



St Kilda Festival

Experience Victoria 2033 sets the scene for the future success of Victoria's visitor economy. We all have a role to play in making this success a reality.

Central to the success of the plan is our industry – the people and businesses who create the products and experiences, and service our visitors.



Phillip Island Winery,
The Yards

Industry is not alone in helping Victoria deliver the priorities outlined in *Experience Victoria 2033*. There are many government departments, agencies and bodies that are here to help.

Department of Jobs, Skills, Industry and Regions

- Provide facilitation support to industry and investors
- Strengthen the profile of tourism and events
- Deliver strategic reforms and economic outcomes to enable industry to grow and thrive
- Support workforce outcomes through training and skills development, and connecting employers with the staff they need.

Visit Victoria and Melbourne Convention Bureau

- Drive demand and visitation through awareness and conversion campaigns, major and business events, and business readiness programs.

Victoria Tourism Industry Council

- Victoria's peak tourism industry body advocating for the visitor economy industry
- Industry support and training services to grow industry capability
- Manages the national accreditation framework in Victoria, delivering training and professional development

Regional Tourism Boards

- Advocate for the tourism industry in their region
- Undertake regional strategic planning
- Coordinate local and regional priorities.

Local Government

- Support local industry, placemaking, local infrastructure, planning, local laws and local investment.

FACILITATING BIG IDEAS IN TOURISM

If you want to help create the future success of Victoria's visitor economy, the Victorian Government would like to hear from you.

The Victorian Government's specialist tourism facilitation team can help bring to life projects that will enable growth and success. The facilitation team provides strategic support to projects across four project phases – from testing the concept, to getting ready for investment, to construction and delivery, through to product launch. The purpose of the team is to fast-track the delivery of investment.

The facilitation team includes experts from across the sector. It has the capabilities to help with product planning, business modelling, finance, and approval processes. In addition, it can help investors succeed by diagnosing the readiness of projects and providing end-to-end support.

The facilitation team can focus on projects of all types and sizes that are in line with the principles and priorities of *Experience Victoria 2033*.

We're here to provide support, including:

- initial research for project feasibility
- specialist advice for planning and development approvals
- market testing and coordination with potential funding partners.

You can reach the facilitation team at tourism.projects@ecodev.vic.gov.au.

Get in touch and tell us about your ideas and how you can make a difference.

For other enquiries about *Experience Victoria 2033* and other industry support initiatives, visit our website at tourism.vic.gov.au or email tourismeventsinbox@ecodev.vic.gov.au.



To receive this publication in an accessible format phone 1300 366 356 using the National Relay Service 13 36 77 if required, or email tourismeventsinbox@ecodev.vic.gov.au

Authorised and published by the Victorian Government
1 Treasury Place, Melbourne.

© State of Victoria, Department of Jobs, Skills, Industry and Regions

ISBN 978-1-76090-636-8 (pdf/online/MS word)

