

ACTIVATING KING VALLEY

PROSECCO ROAD



Urban Enterprise August 2021

For Tourism North East and Regional Development Victoria



**TOURISM
NORTH
EAST**

Acknowledgements

Urban Enterprise acknowledges the Traditional Owners of the country on which the King Valley is located.

We gratefully acknowledge the support and collaboration of the Project Control Group, who have been instrumental in the delivery of this project.

- Tourism North East
- Department of Jobs, Precincts and Regions
- Rural City of Wangaratta
- Visit Victoria
- Taungurung Land and Waters Council
- Pizzini Wines



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The project has been delivered with input from TCL, landscape architects, and Roger Grant, tourism expert.

Unless otherwise stated, all images used in this document have been sourced from Tourism North East, Rural City of Wangaratta or have been taken by Urban Enterprise.

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THE KING VALLEY

A REGION WITH UNLIMITED POTENTIAL

OVERVIEW

The King Valley is a hidden gem of Victoria, located in Victoria's High Country. The King Valley has potential to become one of Australia's leading wine regions.

The experience of the King Valley is akin to no other wine region. Visitors are immersed in a mix of warm Italian hospitality, a sense of family and belonging, generous and abundant produce, quality unpretentious wine and a High Country landscape that both engulfs and calms.

Extensive private sector investment over the past 25 years has seen the King Valley develop unique cellar door and dining experiences.

With growth in the popularity of Prosecco and a boom in visitors to the region, the King Valley is ripe for investment.

To achieve the King Valley's visitor economy potential as a premium destination, a range of enhancements and enabling infrastructure investments are required. This includes much needed improvements to public amenity, infrastructure, trail connectivity and accommodation.

THIS PLAN

The Activating King Valley Prosecco Road Project has been commissioned to establish a shared vision for the King Valley's visitor economy offering. The plan identifies priority tourism investments that enhance the visitor experience and optimise economic outcomes for the region.

The plan draws on extensive market research, engagement with industry and stakeholders, landscape assessment, and an assessment of branding and positioning to inform the vision and future direction for the King Valley.

Project outputs include the Activating King Valley Prosecco Road Project [this report] and business cases for destination enhancement and township revitalisation projects, a luxury boutique hotel in Whitfield, and the Prosecco Trail, a shared-use path connecting Oxley and Cheshunt.

PROJECT DRIVERS

- **The King Valley region currently attracts 590,000 annual visitors who spend \$162 million across the region. These visitors generate economic output of \$268 million and 1,267 jobs for the Hume region.**
- **Significant opportunity to grow overnight visitation, with investment in new high quality visitor accommodation, to fill supply gaps and latent demand.**
- **Visitation is expected to double over the next 10 years based on historic growth trends (+600,000 visitors), however investment infrastructure and product is needed to support this growth potential.**
- **Investment in infrastructure and amenity will greatly improve the visitor experience and allow public spaces to compliment the quality experiences provided by businesses in the region.**
- **Opportunity to unlock private sector investment potential of key towns through investment in enabling infrastructure, visitor amenity and streetscaping, and enhanced connectivity and access.**
- **Latent demand from 38% of Australians who have heard of the King Valley and would be interested in visiting in the future.**
- **Return on public sector investment will be strong, and will lead to increases in private sector investment and visitor spend.**





VISION

The King Valley is the most desired and recognised wine region in Australia, harnessing the generous and warm Italian family spirit to provide an experience of casual luxury and intimate hospitality.

TOURISM DEVELOPMENT OBJECTIVES

Objectives for tourism development in the King Valley have been defined below. These capture the sentiment shared by local business and industry, key stakeholders and the needs of existing and potential King Valley visitors.

- Enhance the visitor experience through improved visitor infrastructure, services, amenity and facilities
- Grow overnight visitation through investment in high quality, motivating accommodation
- Encourage night-time activation to improve visitor satisfaction and increase length of stay
- Create additional visitor activities that provide depth to the experience
- Reinforce and strengthen key towns of Milawa and Whitfield as visitor hubs for the region
- Increase King Valley brand awareness and motivation to visit
- Create a seamless visitor experience and increase connection between the Upper and Lower King Valley
- Showcase and celebrate Italian heritage and Indigenous cultural heritage
- Deliver dining and local produce experiences that complement the wine offering

PRIORITY INVESTMENT BY THEME

Over 50 projects have been identified, aligned to the vision and objectives for tourism development in the King Valley.

Projects have been categorised across seven overarching investment themes, and have been classified as Tier 1, 2 or 3 based on their scale, importance and economic benefit to the region.

Theme 1 Destination Enhancement and Township Revitalisation

Investment in streetscaping, visitor amenity and interventions that will activate and revitalise the region, creating a contemporary and attractive destination that inspires visitors to stay longer and return to the King Valley.

Tier 1 Business Case Project

Destination enhancement and township revitalisation - gateway sculptural interventions and township revitalisation

Tier 2 Projects

Secondary gateway interventions

Wayfinding Signage Strategy and implementation

Removal of Milawa Gourmet Region signage

Tier 3 Projects

Rename Wangaratta-Whitfield Rd

King Valley public art program

Prosecco Trail interpretation

Indigenous reconciliation in Oxley

Strengthening of Powers Lookout

Strengthening of Whitlands Lookout Reserve

Visiting artist program

Theme 2 Accommodation

Development of a variety of accommodation typologies, driven by market preferences, will transform the King Valley and ensure the region is an attractive and high-yielding overnight visitor destination.

Tier 1 Business Case Project

Boutique luxury hotel

Tier 2 Projects

Holiday Park

Large Scale Standard Self-Contained

Tier 3 Projects

Wellness resort

Luxury self-contained

Midscale hotel

Continue investment in Gentle Annie Caravan Park

Amenity improvements to Edi Cutting

Theme 3 Trails and Nature-based

An improved trail network for increased safety, connectivity and business access, as well as enhanced nature-based offerings to provide a well-rounded visitor experience.

Tier 1 Business Case Project

Prosecco Trail

Tier 2 Projects

Riverfront precinct activation

Tier 3 Projects

McMillians Track formalisation

Cheshunt equipment hire hub

Milawa cycle link

Theme 4 Food, Dining and Hospitality

Delivery of high quality and contemporary dining, including farmgate experiences, restaurants, and bars, coupled with the highest level of customer service, will ensure visitor preferences are met.

Tier 2 Projects

King Valley Farmers Market

Summer Spritz Sessions

Providore

Tier 3 Projects

Prosecco and wine bar

Destination café in Whitfield

Expansion of farmgate experiences

Destination artisan bakery

Peak season pop ups

Picnic in the vines

Locally produced aperitive and grapperiera

Bushfood opportunities

Theme 5 Infrastructure and Planning

Investment in enabling infrastructure and streamlining the planning process will facilitate private sector development.

Theme 6 Governance and Marketing

A cohesive tourism governance approach for an overarching King Valley brand will solidify the destination brand, improve brand recognition and grow visitation.

Theme 7 Business Development and Enhancement

Providing support to local businesses to improve their offering and service levels to meet visitor preferences and deliver a premium experience across the King Valley.

Tier 2 Projects

**Wangaratta-Whitfield
Road enhancements**

**Planning for
development**

**Telecommunications
improvement**

Tier 3 Projects

**Investigate transport
solution**

**King River crossing at
Gentle Annie Lane**

**Myrrhee gravel road
sealing**

**Electric vehicle charging
stations**

Tier 2 Projects

**Branding and Marketing
Strategy**

**Tourism Governance
Review**

Tier 2 Projects

**Business enhancement
program**

**King Valley ambassador
program**

Tier 3 Projects

**Hospitality advisory
program**

Improved training

Heritage reuse program

**Italian action plan and
visiting chefs program**



TIER 1 BUSINESS CASE PROJECTS

Destination Enhancement and Township Revitalisation **\$11.5 million [public sector]**

Construction Impact

\$21.7 million output and 56 (FTE) jobs

Ongoing Impact

\$39.5 million output and 170 (FTE) jobs [annual]

This project will position the King Valley as a premium visitor destination, through enhancement of the visitor experience. Key interventions to achieve this goal include:

- Sculptural gateway interventions at primary gateways to the region; Oxley and Whitfield
- Township experience enhancements at key visitor destinations of Milawa, Oxley, Moyhu, Whitfield and Cheshunt



Boutique Luxury Hotel **\$30 million [private sector]**

Construction Impact

\$65.9 million output and 168 jobs

Ongoing Impact

\$51 million output and 251 jobs [annual]

The most important short-term accommodation investment project in the King Valley, this project will deliver a 40-60 room boutique luxury hotel. Amenities will include a restaurant, bar, swimming pool, art gallery, recreation facilities, a day spa and small events space.



Prosecco Trail **\$12.1 million [public sector]**

Construction Impact

\$23.2 million output and 60 jobs

Ongoing Impact

\$10.5 million output and 46 jobs [annual]

The Prosecco Trail will provide a 43.4-kilometre shared use trail within the road reserve between Oxley and Cheshunt. The trail will link tourism experiences and townships for residents and visitors.



ECONOMIC IMPACT OF TIER 1
BUSINESS CASE PROJECTS

Investment in the three priority business case projects will have major economic benefits for the Hume region. This includes public sector investment of \$23.6 million and private sector investment of \$30 million.

Expenditure on construction will deliver short term economic benefits of \$110 million in output and 284 construction jobs. Increased expenditure by visitors will deliver \$101 million in additional output and 467 ongoing jobs in the Hume region.



\$23.6M PUBLIC
\$30M PRIVATE

INVESTMENT ASK



+38,400 VISITORS
+\$57M SPEND

VISITATION
BENEFIT



+\$111M OUTPUT
+284 JOBS

CONSTRUCTION
BENEFIT



+\$101M OUTPUT
+467 JOBS

ONGOING BENEFIT
[ANNUAL]

KING VALLEY
VISITOR ECONOMY
POTENTIAL

Public sector investment of \$23.6 million in the three priority business cases will grow the King Valley visitor economy from an existing \$268 million in output and 1,267 jobs to \$369 million in output and 1,734 jobs, once projects are completed and operational.



CURRENT
KING VALLEY
VISITOR
ECONOMY

590,000
visitors

POTENTIAL VISITOR
ECONOMY WITH
INVESTMENT IN TIER
1 BUSINESS CASE
PROJECTS

628,400
visitors



\$162M
spend

\$219M
spend



\$268M
output

\$369M
output



1,267
jobs

1,734
jobs

BACKGROUND AND CONTEXT



KING VALLEY OVERVIEW

The King Valley is an area of exceptional beauty, extending from the plains around Wangaratta through to Alpine National Park.

The King Valley has developed a reputation for quality wine, with a strong emphasis on Italian varietals and in particular Prosecco. 180 acres of prime King Valley land are planted with Prosecco currently, representing 64% of all Prosecco plantings in Australia.

The wine experience of the King Valley is supported by immense natural beauty and high quality agriculture and farmgate produce.

The extent of the King Valley has been determined by the boundaries of the Geographical Indication (GI) region, as defined by Wine Australia.

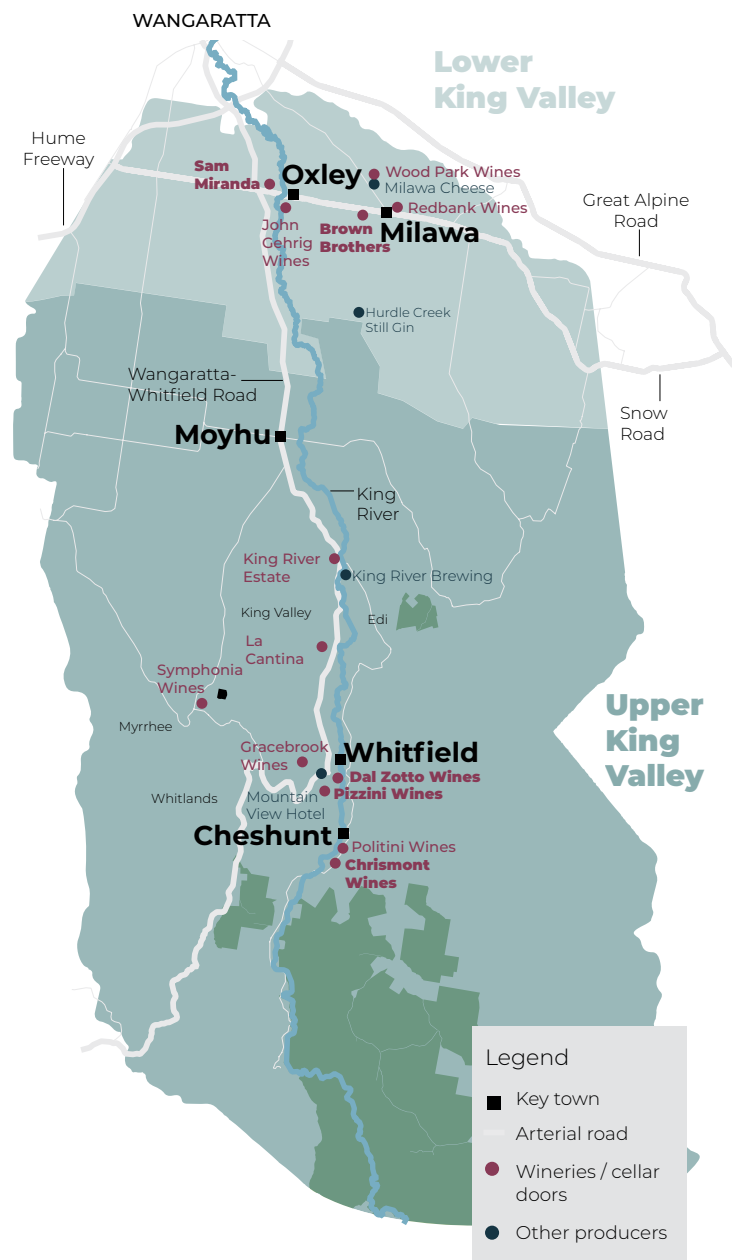
Milawa and Whitfield are the hero towns of the King Valley, defined by their locations on key arterial roads of Snow Rd (Milawa) and Wangaratta-Whitfield Rd (Whitfield). These two towns form the anchors of the Upper and Lower King Valley sub-regions, which have been defined for the purposes of this study.

THIS PLAN

Urban Enterprise has been engaged to deliver the Activating King Valley Prosecco Road Project, which provides a plan for the King Valley and supporting business cases for tourism products and infrastructure.

The plan will establish a shared vision for the King Valley's 'Prosecco Road' offering, identifying priority tourism developments that enhance and optimise the visitor experience and economic outcomes for the region. The plan will support recovery from the impacts of bushfire and COVID-19 on the visitor economy.

With support from design consultants TCL, the plan sees the quality and experience of the King Valley brand translated to the visitor journey, infrastructure and amenity.



What is the Prosecco Road?

This project emerged from the renowned King Valley Prosecco Road wine marketing initiative.

The concept emerged as a result of the region's five iconic wineries, Brown Brothers, Cheshunt, Dal Zotto, Pizzini, and Sam Miranda, working together to reimagine the King Valley. The Prosecco Road was used as a marketing and promotional tool to drive interest in the region.

The Prosecco Road is not a physical road or route; it is a journey. The Prosecco Road can be seen as a pilgrimage to Northern Italy and a journey through the Australian home of Prosecco.

King Valley Prosecco Road is a tour and journey across the region, which can be undertaken by car, bike or foot.

KING VALLEY PRODUCT OVERVIEW

The King Valley visitor economy is driven by wine and winery experiences. This includes cellar door tasting experiences, restaurants, wine sales and wine production.

The Lower King Valley area has long been a popular visitor destination, leveraging off Snow Road traffic and is home to popular food and wine destinations Brown Brothers and Milawa Cheese. The Murray to Mountains Rail Trail is a key asset linking Milawa and Oxley, as well as providing a connection to the broader High Country region.

The Upper King Valley has gradually improved as a visitor destination with cellar doors and restaurants developing over the past 20 years.

The Upper King Valley has strengths in water and nature-based assets, including the King River, Lake William Hovell, and Alpine National Park.

With growth in the popularity of Prosecco and a boom in visitors to the region, the King Valley is ripe for development and investment to become a leading wine tourism destination in Australia.



The Hero Product Wine & Wineries

The Hero Experiences

Brown Brothers
Chrismont
Dal Zotto
Pizzini
Sam Miranda



Food and Produce

Key products

Milawa Cheese
Milawa Mustards
Mountain View Hotel



Water

Key products

King River
Lake William Hovell
Paradise Falls

The King Valley is¹

“peace and tranquillity”

“casual luxury”

“a big warm hug”

“the most beautiful
landscape”



Nature

Key products

Alpine National Park
Powers Lookout



Cycling

Key products

Gravel Cycling
Murray to
Mountains Rail
Trail

¹ Quotes taken from past visitors who responded to intercept surveys and participated in focus groups.

INFORMING THE ANALYSIS

PROCESS

A robust process was undertaken to ensure a thorough understanding of the King Valley product, brand, strengths, barriers and opportunities for future growth.



10+ background documents reviewed



20+ Workshops and Engagements with industry, stakeholders and Council



2,500+ responses to market research surveys and 17 focus group participants



Visitation and economic impact modelling



70+ accommodation properties reviewed and market assessed



Trail route assessment from Oxley to Cheshunt



6 townships, 4 gateways, landscape and visitor journey assessed



Infrastructure and development needs and potential investigated



50+ project ideas identified



Preparation of plan and 3 business cases

DOCUMENT REVIEW

The following key documents were reviewed to inform the Plan. A range of secondary documents were reviewed, which have been referenced where relevant.

- Wines of the King Valley (2019) - King Valley Prosecco Road Destination Management Plan
- Quantum Market Research (2017) - North East Victoria Wine Tourism Research
- Quantum Market Research (2018) - Walk Tourism Segmentation Report
- Quantum Market Research (2020) - Brewery Audience Segmentation Research
- BDA Marketing Planning (2017) - North East Victoria Cycling Research
- SGS Economics & Planning (2018) - Rural City of Wangaratta Economic Development Strategy 2018-2023
- Rural City of Wangaratta (2008) - Rural City of Wangaratta 2030 Community Vision
- Rural City of Wangaratta – Milawa and Oxley Township Development Plans

STAKEHOLDER CONSULTATION

Key stakeholders engaged include:

- Blue sky workshop with key industry stakeholders, government representatives
- Famil Tour with stakeholders and industry
- 2 industry workshops with over 25 participants
- Community Group workshops - Whitlands Progress Association and Moyhu Action Group / King Valley Infrastructure Project
- Local Tourism Association (LTA) workshops - Milawa Gourmet Region and King Valley Tourism Association
- 1:1 meetings with key industry stakeholders / investors
- Traditional Owner Groups - Taungurung Land and Waters Council, Yorta Yorta National Aboriginal Corporation, and Bpangerang Traditional Owners

OUTLINE OF MARKET RESEARCH PROGRAM

A rigorous market research program was undertaken to inform the Plan. This ensures that the plan is market driven and responds to visitor needs, preferences and viable commercial opportunities.

An overview of the market research program is provided below.

PAST VISITOR RESEARCH SURVEY

The research objective was to understand the King Valley visitor profile and travel patterns, identify product and infrastructure requirements, and inform the economic analysis to understand the size of the visitor economy.

Survey responses were received from 541 visitors to the King Valley. Surveys were completed in-region using:

- QR codes at businesses completed across the month of January
- Intercept surveys undertaken January 7th – 10th



POTENTIAL VISITOR MARKET RESEARCH

Market research of Australian residents was undertaken to achieve the following objectives:

- Understand importance of accommodation and dining in motivating a trip to the Victorian High Country
- Identify food/dining and accommodation preferences, expectations and experiential qualities sought by potential future visitors to the High Country
- Identify key accommodation and dining market segments for the High Country
- Identify the proportion of Australians who have interest in visiting the King Valley
- Understand market associations with the King Valley
- Assess Milawa Gourmet Region brand impact compared to King Valley brand

An overview of the research components has been provided below.

See *Victorian High Country Accommodation and Dining Market Research May 2021* for further details on methodology and detailed research findings.

Market Audience Surveys	Two market audience surveys with a statistically representative random sample of 2,194 Australian residents. <ul style="list-style-type: none"> • Survey 1 - 1,028 Victorian resident responses • Survey 2 - 1,166 Australian resident responses (excluding Victorian residents)
Focus Groups	Four 60-minute focus groups with participation from 17 past visitors to the Victorian High Country, with random gender and age distribution.
Accommodation and Dining Market Segmentation	Urban Enterprise adopted a cluster analysis with limited variables for this research. This allows the definition of homogeneous groups and shows clear differentiation in the personas developed.

WHAT MAKES A SUCCESSFUL VISITOR DESTINATION?

RESPONDING TO THE VISITOR JOURNEY

Key to creating a successful visitor destination is understanding the contemporary visitor journey and how this impacts on product and experience development and marketing.

Below are the steps that form the visitor journey.

	What's important?	How is information consumed?
1 Dreaming	Seed is planted	
	Captivating Imagery Advertising and Marketing	Travel Blogs Ads – TV, Radio Facebook, Instagram Friends / Relatives
2 Planning	Pre-booking research	
	SEO Optimised Listings on Google Maps Quality content	Travel Blogs Destination Websites Friends / Relatives
3 Booking	Call to action	
	Easy to navigate website, links to booking sites, SEO	Booking sites, including accommodation (e.g. Airbnb, Booking.com) and experiences (e.g. Red Balloon)
4 Experiencing	During Visit	
	Products and experiences to meet visitor needs Accommodation Visitor infrastructure and amenity In-region visitor information	Google Maps Visitor Guides Regional Maps Businesses & Locals Brochures Social Media VICs
5 Sharing	During / post visit	
	Telecomms for visitors to share photos / experiences	Social media Word of Mouth to friends / relatives Travel blogs

1. Visitors are motivated to visit a destination when the seed is planted through marketing, inspiring imagery or word of mouth. Research indicates that 1 in 3 leisure travellers do not have a specific destination in mind when they first think about going on a trip¹. This provides an opportunity to inspire visitors the King Valley.
2. The majority of research in the pre-booking phase occurs through online media and information, requiring high quality, engaging, informative and easy to navigate websites. The King Valley requires a clear and cohesive online presence to translate interest to visitation.
3. If the visitor is satisfied with their pre-booking research, they are called to action to book. The conversion to a booking requires enough information available remotely to influence the visitor's desire to book.
4. During the experiencing stage, it is critical that the region delivers a first class experience aligned to contemporary visitor expectations. This includes quality accommodation, contemporary and quality dining and produce with a high level of service and hospitality, and modern and well-maintained visitor infrastructure and amenity. This will ensure visitors are satisfied with their experience and encourages positive word of mouth marketing, as well as encouraging repeat visitation.

In this stage, it is important to have information that supports the visitors understanding of the region, by reinforcing products and experiences through signage, gateway treatments to demarcate the region, and visitor guides and maps. This assists to extract more yield and longer length of stay from visitors when they come to the region.

5. Sharing of experiences occurs in the final stage, through social media and online reviews and recommendations. Visitors are more likely to share photos online if the experiences and infrastructure are impressive. An example of this is D'Arenberg in McLaren Vale.

¹ Visit Victoria Servicing Intercept Research 2019.

INSIGHTS FROM OTHER FOOD AND WINE REGIONS

There are over 60 wine regions in Australia. To build a successful wine region, the region must be known for something AND must offer more activities than just wine experiences.

An assessment of case studies revealed the following insights:

- Not every visitor is seeking the same experience when visiting a wine region. For some wine is not the primary consideration.
- Successful wine regions have a breadth of visitor experiences outside wine, and provide a range of activities and experiences.
- Visitor infrastructure, amenity and streetscaping is contemporary, cohesive across the region and is well-maintained. This is essential to delivering a satisfying visitor experience and the absence of amenity is always noticed by the visitor.
- Contemporary design and artworks can reinvigorate, re-energize and make global connections that enhance the brand, attract a new market of visitors and increase bragability of the destination.
- Awareness and brand recognition brings visitors to the region, but unique experiences and a sense of discovery is what satisfies visitors and creates a memorable experience.
- Quality wine experiences must be matched by the same quality of food, dining and hospitality.
- Contemporary accommodation is needed to satisfy visitors.

McLaren Vale, South Australia



Margaret River, Western Australia



Martinborough, New Zealand



Napa Valley, California USA



WHAT DOES THIS MEAN FOR THE KING VALLEY?

- 1** The visitor experience needs to be enhanced through investment in infrastructure, streetscaping and visitor amenity. The King Valley does not necessarily need gamechangers - it needs to deliver high quality basic infrastructure.
- 2** The King Valley needs a clear brand message and cohesive digital presence to create market cut-through.
- 3** The region needs to invest in building a holistic tourism experience that can satisfy visitors.
- 4** The private sector must continue to innovate and provide contemporary food experiences.
- 5** High quality, modern and luxury accommodation options enhance the visitor experience and complement the quality wine and food offerings.
- 6** The public sector must address investment barriers to allow the private sector to flourish and deliver what the visitor is looking for.

KEYS TO SUCCESSFUL DESTINATION MANAGEMENT

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

- Place – defining the destination in the eye of the visitor and communities of interest and understanding the visitor journey to and within the region.
- People – cohesive governance and strong leadership, engaged industry and qualified and experienced labour force.
- Product – motivating products, quality infrastructure and experiences on offer that draw visitors and provide to visitor needs.

The Activating King Valley Prosecco Road Project has been prepared with best practice destination management planning. The following is a discussion relating to the attributes of successful destination management and how this relates to the King Valley.

PLACE

Well defined region

A major focus of this project is defining the King Valley Region and the experience that it offers. Tourism destinations that are well defined and have communities of interest working together are those that resonate best with the visitor.

The King Valley has long had fragmentation between the Upper King Valley (Whitfield/Cheshunt/Moyhu) and the Lower King Valley (Milawa/Oxley). King Valley Prosecco Road is a concept that was established to improve collaboration. The end result to strengthening the King Valley as one regional destination will be increased visitation, increased visitor yield, and improved visitor experience.

PEOPLE

Cohesive governance and strong leadership

A cohesive tourism governance structure, with clear roles and responsibilities for product development and marketing, will ensure a destination prospers.

The region has a complex assortment of Local Tourism Organisations (LTA's) that each operate independently and lack a unified approach.

Key players include Millawa Gourmet Region, Wines of the King Valley (producers) and King Valley Tourism Association. Marketing efforts and brand messaging from these groups is fragmented. This creates confusion for the visitor, with a range of websites with varied branding and communications.

There is a need for improved tourism governance within the region, which will translate to a clearer brand and message to the consumer.

ENGAGED INDUSTRY

The King Valley Region has a well engaged industry that deliver high quality products, service levels and experience to visitors. Recent growth of the King Valley is largely in response to the investment by the wine industry opening cellar doors and complementary product. The Activating King Valley Prosecco Road Project is the result of having an engaged industry that require a plan to drive investment and growth in the region.

HIGH SERVICE LEVELS AND QUALITY AMENITY

High quality service, business offerings as well as business fit outs influence the visitor experience.

The King Valley is regarded for its warm hospitality and high quality service levels, as reinforced in market research for the region. The high levels of service and warm hospitality are the result of many wineries still being family owned and operated, and the strong sense of generosity shared by the Italian families of the region.

Whilst hospitality and service are excellent, there were mixed responses in relation to the overall quality of the food offer in the region from research undertaken for the project. In some cases, food is acknowledged as of very high quality, however in other instances, the lack of consistency and quality left some visitors disappointed, according to market research.

Ambiance and quality of the built environment is also important for visitors to the region. Some businesses are well advanced and have invested heavily in their food and cellar door fit out. In other businesses there is potential for further investment to support the amenity provided to visitors. Simple examples such as the quality of furniture and presentation can go a long way to improving visitor perception and experience.

ACCESS TO CAPITAL

A successful visitor destination requires significant private sector capital investment to deliver premium experiences and infrastructure.

This plan identifies significant capital required to lift the amenity provided to visitors. A large amount in capital is required to provide quality visitor accommodation in the region.

As many of the operators in the region are family-owned, businesses in the King Valley Region may have limited access to capital to realise the opportunities presented in this plan. In order for the King Valley to progress in line with the vision in this plan, external capital investment in the region is required.

EXPERIENCED AND ACCESSIBLE LABOUR FORCE

Access to a large and quality labour force is critical to growth of a regional destination.

The King Valley is facing difficulty attracting and maintaining its visitor economy workforce. Difficulty sourcing appropriately qualified wait staff and chefs is common for businesses across the region.

This is due in part to the labour force shortages, impacts of Job Keeper, lifestyle attributes associated with regional areas, and lack of affordable housing. A lack of housing and conversion of existing housing stock to Airbnb is exacerbating the housing affordability issue, as is limited development of new permanent residential dwellings in the Valley.

Affordable housing is key to enabling the growth of individual businesses by providing housing for staff, allowing the region to foster and sustain a local workforce.

MOTIVATING PRODUCT

Product is the key element a destination is built around. This provides the reason that draws visitors to a destination and drives the visitor economy.

Wine, food and nature are the key product elements that motivate visitors to the region. Continued improvement of the product offer is necessary to capture a growing market and diversification of the offer allows for a richer experience for the visitor.

Accommodation is often a defining factor of the visitor experience and is essential for establishing and growing a regional destination. The King Valley has relatively low levels of overnight visitation due to low supply of visitor accommodation. A key focus of this plan is identifying the needs of accommodation investment in the region.

QUALITY INFRASTRUCTURE

Infrastructure within destination management are the assets often delivered and funded by Government. This includes roads, township streetscapes, parks, nature-based assets, trails, telecommunications, water assets, and services such as sewer and power. These are the elements that support private sector investment and also provide the backbone to carrying capacity within a destination.

The Activating King Valley Prosecco Road Project has a strong focus on delivering quality infrastructure and the attributes that will support industry investment and improved visitor experience of the region.



VISITOR MARKET ASSESSMENT

The visitor was at the heart of this project.

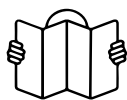
This section provides an overview of the significant primary research that was undertaken to inform the Plan.

Surveys completed by past visitors informed the King Valley visitor economy estimates, the past visitor profile and the needs of existing market assessment.

Market research from a representative sample of the Australian population have been used to understand the accommodation and dining needs, preferences and expectations of the future King Valley visitor. This draws on two online surveys with over 2,000 responses, and four focus groups with 17 participants.



KING VALLEY VISITOR ECONOMY



590,000
visitors

368,000 222,000
day trip overnight
(59%) (41%)



\$162 M
spend

\$80M \$82M
day trip overnight
(49%) (51%)



\$268 M
output

\$162M \$82M
direct indirect



1,267
jobs

851 416
direct indirect



\$129 M
GSP

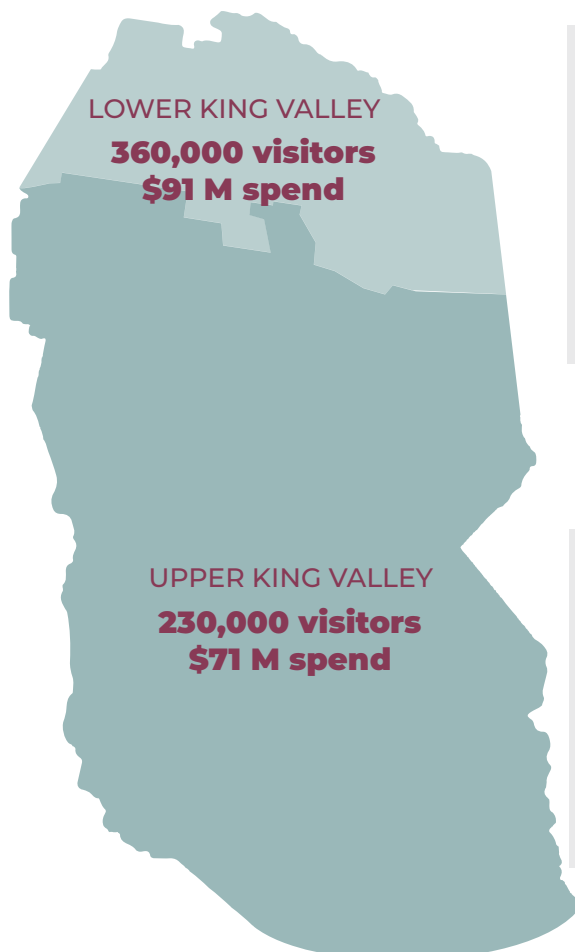
\$67M \$62M
direct indirect

The King Valley sees over 500,000 annual visitors, spending \$162 million. This results in \$268 million in output for the Hume Region and 1,300 jobs.

Visitation has been estimated for 2020 based on pre-pandemic visitation patterns and current accommodation supply.

The majority of visitation occurs in the Lower King Valley, driven by day trip visitors travelling on Snow Rd or from surrounding centres such as Wangaratta and Benalla.

The Upper King Valley sees more overnight visitors owing to its distance from major centres and its characteristics as an holiday destination. Limited accommodation stock constrains the ability of the Upper King Valley to grow overnight visitation.



Daytrip visitors **65,000** visitors
\$14 M spend

Overnight commercial **33,000** visitors
\$19 M spend

Overnight caravan/camping **132,000** visitors
\$38 M spend

Daytrip visitors **303,000** visitors
\$66 M spend

Overnight commercial **30,000** visitors
\$18 M spend

Overnight caravan/camping **27,000** visitors
\$8 M spend

Source: Urban Enterprise, visitor modelling based on King Valley past visitor survey and Tourism Research Australia insights, 2021.

KING VALLEY VISITOR PROFILE

The King Valley attracts visitors mainly for food and wine (60%) experiences. Other main motivations for travel include nature (36%) and water (21%).

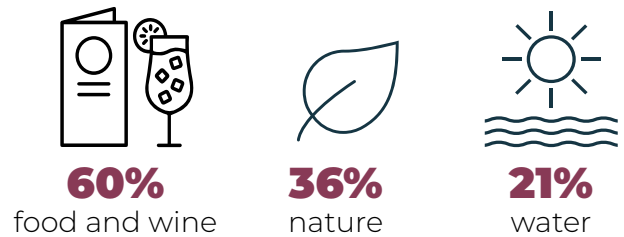
Visitors to the King Valley predominately travel as a couple (60%), family group (30%) and with friends (16%). Importantly, family group travel is high in the King Valley due to the relaxed and warm family setting.

Key activities undertaken by visitors are food and wine related, reinforcing the strengths of the region however highlighting the lack of additional activities for visitors. Nature-based activities are also important for visitors, including walking and hiking, swimming, camping and visiting national parks.

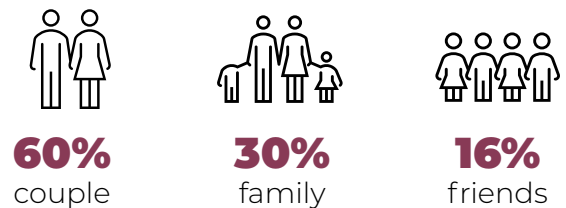
The majority of visitors to the King Valley are from Victoria, predominately Melbourne-based (72%). This demonstrates a major opportunity to grow interstate and international visitation.

The King Valley has a high level of repeat visitation. This highlights both visitor satisfaction with their experiences in the King Valley, but also the need to broaden the visitor market and attract new visitors to the region through promotion and product development.

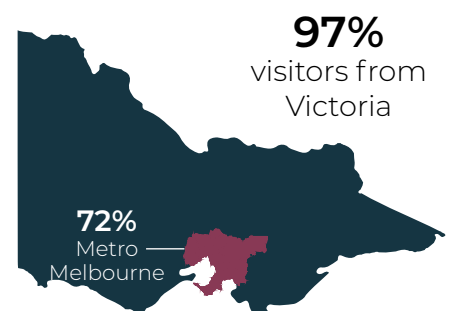
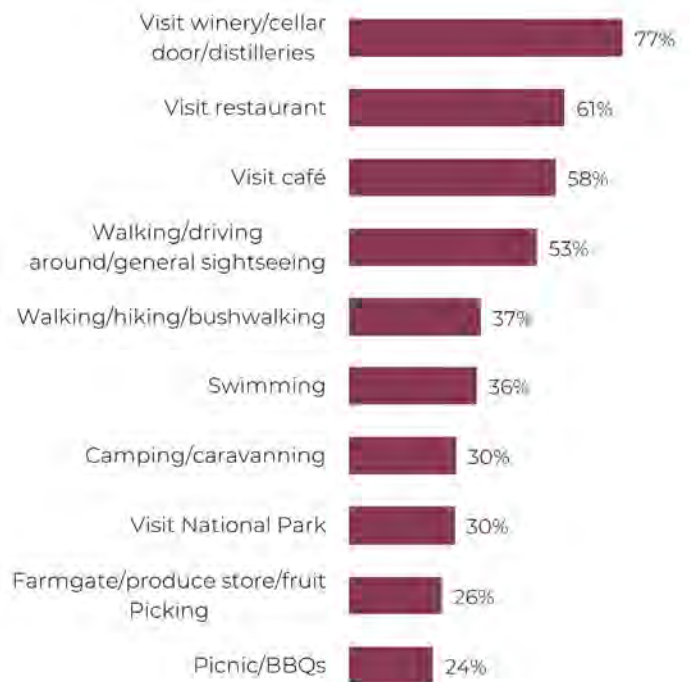
Main motivations for visit



Travel party types



Activities Undertaken



Source: Urban Enterprise King Valley past visitor survey, 2021.

KING VALLEY VISITOR SPEND

The average spend for daytrip visitors to the King Valley is high, due to the high spend on meals and alcohol. The daytrip market captures a large number of regional residents and visitors travelling to the King Valley for lunch at wineries and to buy local wines and produce.

Whilst commercial overnight visitors are high yielding, they represent only a small proportion of visitor spend for the King Valley (23%). An increase in accommodation will enable the region to grow its overnight visitors, and subsequently grow visitor expenditure substantially.

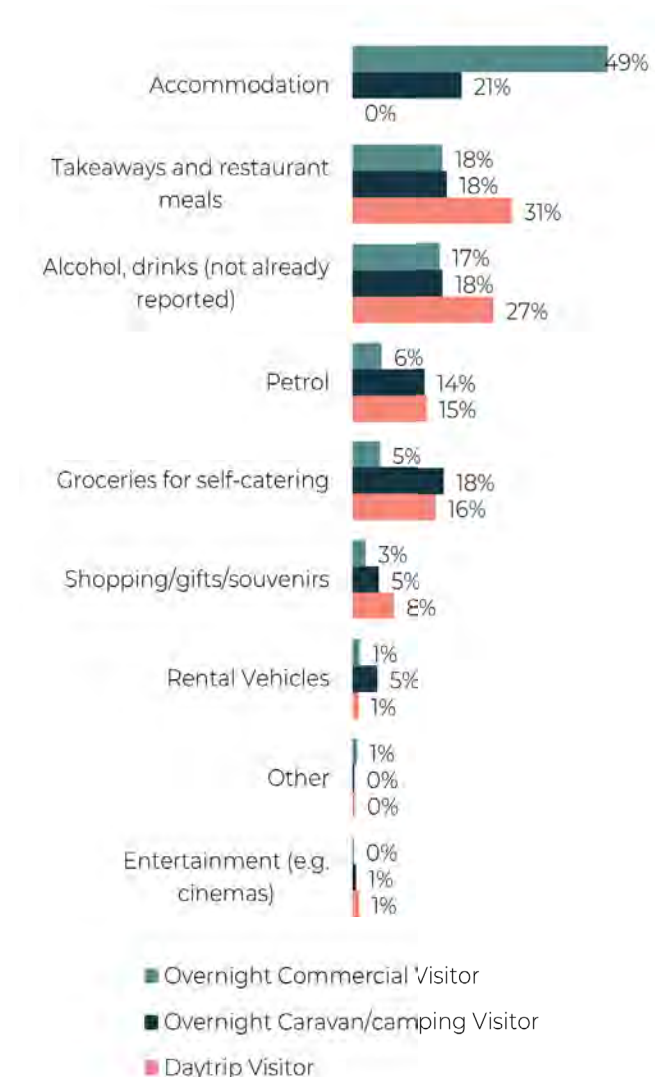
Caravan and camping visitors do not generate much more yield than daytrip visitors, as they spend a limited amount on accommodation, and tend to self-cater.

The King Valley visitor spends a high amount on takeaways and alcohol and other drinks. Many of the wineries have a large wholesale trade, and visitors travel to the region to buy wine in bulk. This is highlighted by the large proportion of daytrip visitor spend reported towards alcohol spend (27%).

Visitor Spend



Spend by Category



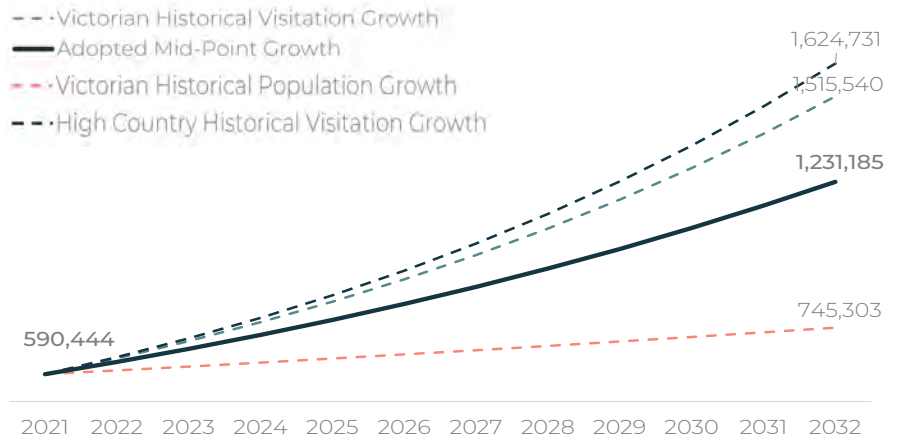
VISITOR DEMAND

Based on a range of visitation forecast scenarios, the King Valley is positioned to have high growth of 6.9% per annum over the next 10 years. This will result in visitation doubling over the 10 years to 2032.

This demand will not be met without public sector investment in enabling infrastructure and amenity that supports private sector activation.

“38% of Australians have heard of and are interested in visiting the King Valley”¹

2032 King Valley Visitation Forecast Scenarios



Source: Urban Enterprise, visitor forecast modelling, 2021.

TARGET MARKETS

The key target market for the King Valley is the Lifestyle Leader market, the key psychographic market developed and targeted by Visit Victoria.

This is a higher yielding, progressive market who are willing to try new experiences, and have a desire for high quality tourism product.

This strategy will aim to develop initiatives to target the Lifestyle Leader market, in order to drive economic growth and sustainable tourism development through increasing visitor yield.

Whilst the region already attracts this market to a degree, improvements to infrastructure in terms of accommodation and visitor amenity are required to meet their expectations and needs.

The Lifestyle Leaders market segmentation model also incorporates four categories of target markets specific to the types of experiences sought within the market, as outlined below.

Key market segments for the region to target will be the Food and Wine Lifestylers, Inspired By Nature, Enriched Wellbeing and Creative Opinion.

Integral to attracting these markets will be the delivery of projects aligned to their preferences and needs, including high-quality accommodation and food and beverage, nature-based attractions and activities, and high quality infrastructure.

Attracting Lifestyle Leaders will help to increase visitor yield across the region, and decrease seasonality impacts across the year.

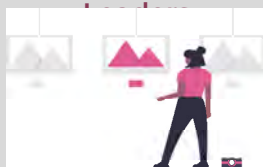
Inspired by Nature



14% of pop. 18+

Regularly escape for weekends and like to get active to varied degrees, (e.g. hiking, cycling, shopping & dining).

Creative Opinion



6% of pop. 18+

Involved in cultural and creative pursuits, & open to risks, new experiences & new ideas.

Food & Wine



13% of pop. 18+

Like to learn the characters and stories behind the food and wine from the winemaker or chef.

Enriched Wellbeing



7% of pop. 18+

Progressive, educated and professional individuals who seek luxurious breaks.

¹ Accommodation and Dining Market Research, Urban Enterprise, 2021.

EXISTING VISITOR MARKET NEEDS

IMPROVEMENTS THE KING VALLEY VISITOR SEEKS

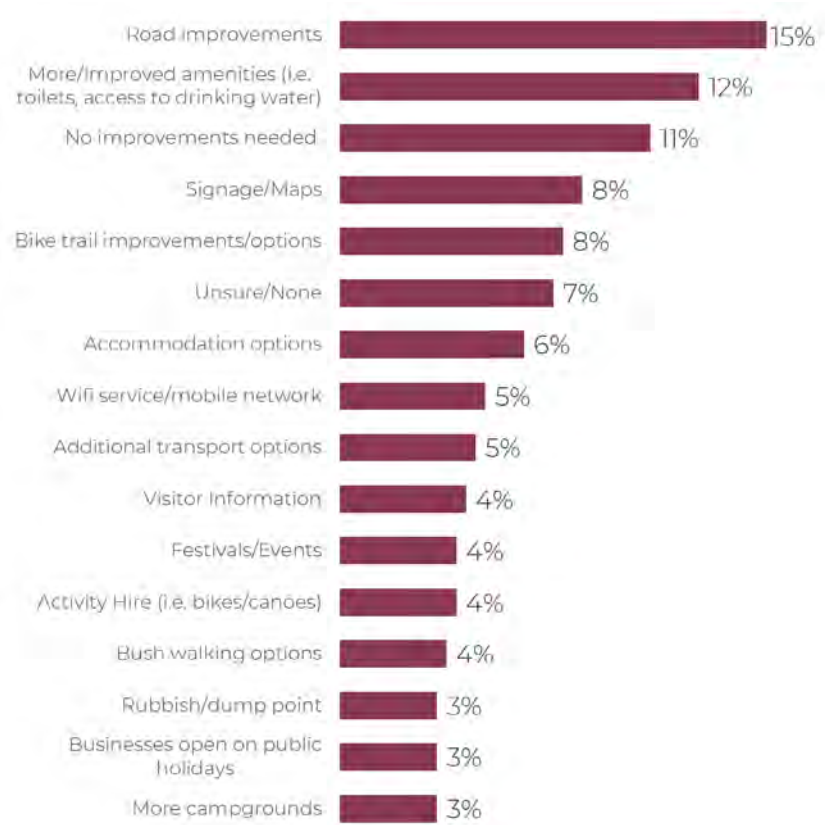
Visitors were asked to identify what improvements they sought that would enhance their experience and satisfaction visiting the King Valley.

Key improvements suggested relate to the quality of infrastructure, amenity, visitor services and complementary tourism product such as tracks and trails and accommodation. Improvements were less so related to the breadth of products and experiences available.

Road improvements (15%) and improved visitor amenity and servicing (12%) were the key issues mentioned by past visitors. Bike trail improvements and options for bike trails ranked highly (8%), as well as additional transport options, indicating visitors seek both improved connectivity and access to cycling experiences.

Some noteworthy suggestions from visitors include:

- “More walks and historic information including Aboriginal heritage would be good”
- “A farm tour to pick fruit”
- “Electric vehicle chargers at wineries”



Source: King Valley Past Visitor Survey, Urban Enterprise, 2021.





WHAT WILL MOTIVATE OFF PEAK VISITATION?

Past visitors were asked what would motivate them to visit the King Valley in the off-peak season.

The key experience that would motivate visitors to travel to the King Valley during the off-peak season is festivals and events. Investment in high profile events provides an opportunity to grow awareness amongst the potential visitor market, as well as to attract new visitors to the King Valley.

Enhanced food and wine experiences, visits to wineries and local produce also rank highly as motivations for off-peak visitation. This reinforces the need for high quality customer service, unique food and dining experiences, local produce and contemporary dining establishments.

Festivals / events	31%
Food / wine experiences	13%
Visiting wineries	10%
Nature (parks, water, views)	8%
Local produce	8%
Likely to visit anytime	7%
Escape the city	5%
Local Markets	5%
Less Crowds	5%
Accommodation / dining deals	5%
Wine tasting / tours	4%
Prefer non-peak season	4%
Camping availability	4%

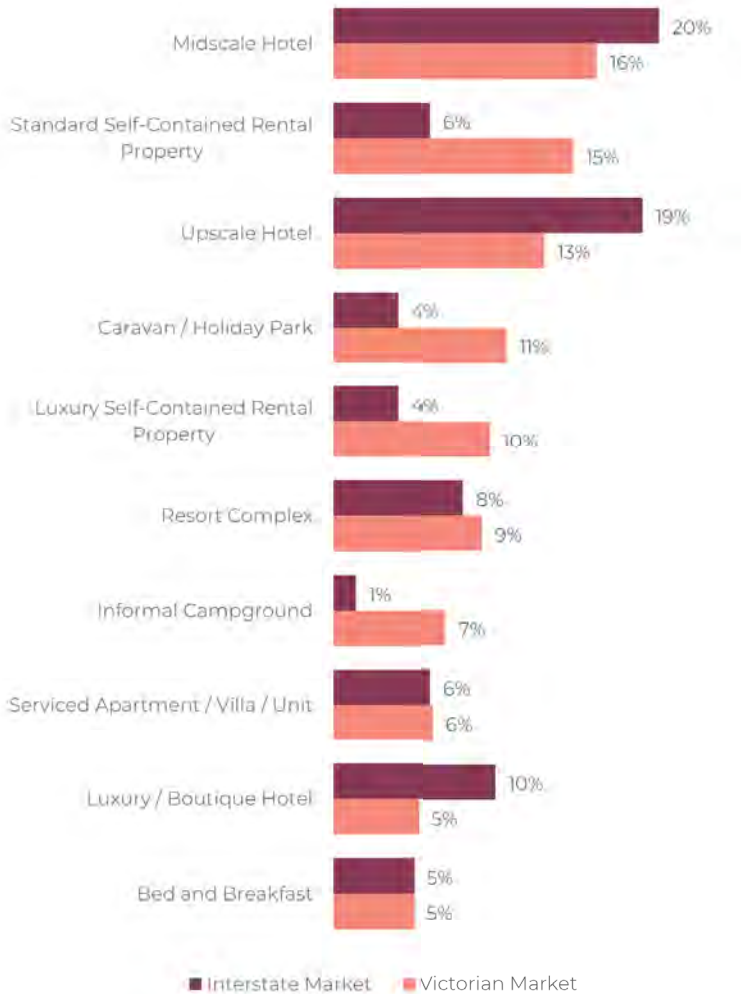
Source: King Valley Past Visitor Survey, Urban Enterprise, 2021.

Motivating repeat visitation from the existing market

- Improvements to key arterial roads to ensure visitor safety and satisfaction.
- Improved visitor infrastructure and amenity in key towns, including toilets, bins, drink bottle refill stations, rest spots, parks, and streetscaping.
- Improved trail connections between key attractions and across the region.
- Increased range of accommodation options available, including high quality commercial accommodation options.
- Development of festivals and events to attract visitors and enhance brand awareness. Integrated events that are not solely focused on wine will be important to attracting a breadth of visitors, as well as markets to showcase local produce and provide an additional activity for visitors.

ACCOMMODATION MARKET

Preferred accommodation for a future visit to the High Country



ACCOMMODATION PREFERENCES

Key findings from the High Country accommodation market research are shown below, as relevant to the King Valley.

- Accommodation is the most important factor and is usually booked before dining. This reinforces the importance of high quality and motivational accommodation
- Breakfast being included in the accommodation is a big draw card for a large proportion of the market
- Visitors desire an experience that feels like an escape from Melbourne – King Valley is in the sweet spot for luxurious weekend escapes as it is 2.5 hours from most of Melbourne and feels rural/remote, particularly Whitfield/Cheshunt
- Interstate visitors travel differently to intrastate visitors, and seek higher levels of service in their accommodation when visiting an interstate destination – approximately 50% preferred some form of hotel
- Preference for mid-scale hotels in the Victorian market is due to price. There is a need to deliver quality hotel facilities in the midrange price-point (\$100-200 a night)
- Location is the most important deciding factor when choosing accommodation across all typologies. This suggests that any investment must carefully consider location and siting principles

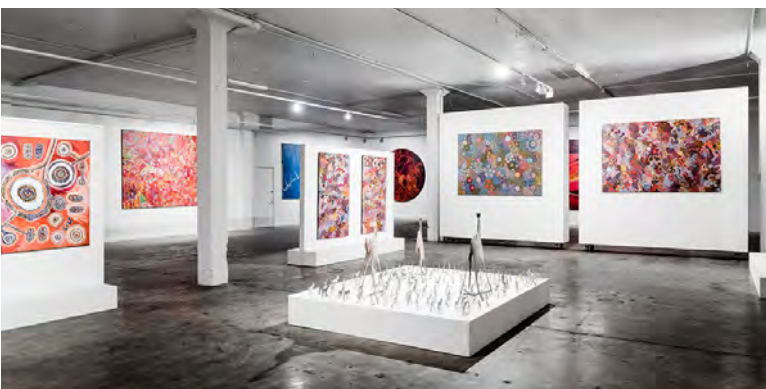
ACCOMMODATION QUALITIES SOUGHT

Visitors seek natural views, feeling of immersion in nature and light, spacious accommodation. Saffire Freycinet (shown above) was preferred by visitors for these qualities, and was felt to be best suited to the ambience of the King Valley.

Mitchelton was the favoured accommodation typology amongst the Victorian market due to its scale (60 rooms), model (hotel with pool, onsite restaurant and gallery), location (natural outlook onto Goulburn River, proximity to town), and pricepoint (\$400-600). The dark and ultra-contemporary design was however felt to be unsuitable to the King Valley.

Common expectations amongst all markets include onsite parking, provision of television and wifi and in-room tea and coffee at a minimum.

PRECEDENT: Saffire Freycinet, Tasmania






PRECEDENT: Mitchelton, Nagambie



ACCOMMODATION MARKET SEGMENTS

Accommodation market segmentation has been prepared by Urban Enterprise for Victoria's High Country. An overview of these segments and their preferences has been provided below.

Market Segments	Selective Traveller (15%)	Adaptable Adventurer (62%)	Carefree Explorer (23%)
Segment Overview	 <p>Will not visit a destination if their preferred accommodation is not available.</p> <p><i>"I don't want to visit somewhere if I have to stay in accommodation that's not up to scratch. I'd prefer to just go somewhere else"</i></p>	 <p>Flexible with accommodation if it means they can visit their preferred destination, but within reason; they won't stay just anywhere.</p> <p><i>"Not staying in my preferred accommodation won't deter me from going where I want, as long as the options are not really bad"</i></p>	 <p>Will visit their preferred destination regardless of the accommodation available.</p> <p><i>"I don't care where I stay as long as I can visit the destination I want"</i></p>
Preference Overview	<ul style="list-style-type: none"> • Preference for upscale hotel (20%) or luxury self-contained rental (17%) • Willing to pay \$300-\$400 for preferred accommodation • At a stage and status in their life where they don't want to settle for accommodation that is sub par • Seek higher levels of service than other segments • High expectations of a range of services and facilities in accommodation, including gym and restaurant • Want to be close to town and nearby attractions so they can relax and not have to worry about driving 	<ul style="list-style-type: none"> • Preferred accommodation is midscale hotel (20%), standard self-contained rental property (18%), caravan park (14%) or upscale hotel (14%) • Willing to pay between \$200-300 for preferred accommodation • Happy to alter their accommodation choice based on what is available at their preferred destination • Want to be in touch with nature in their accommodation but also close to nearby attractions • Less phased by bells and whistles in accommodation, although these are "nice to have" 	<ul style="list-style-type: none"> • Preferred accommodation is a midscale hotel (22%) or standard self-contained rental property (18%) • Largest proportion of this market won't spend more than \$200 on accommodation • Happy to visit anywhere in the High Country - don't have specific destinations in mind • This market likes to self-cater so in-room cooking facilities are most important to this market (33%)

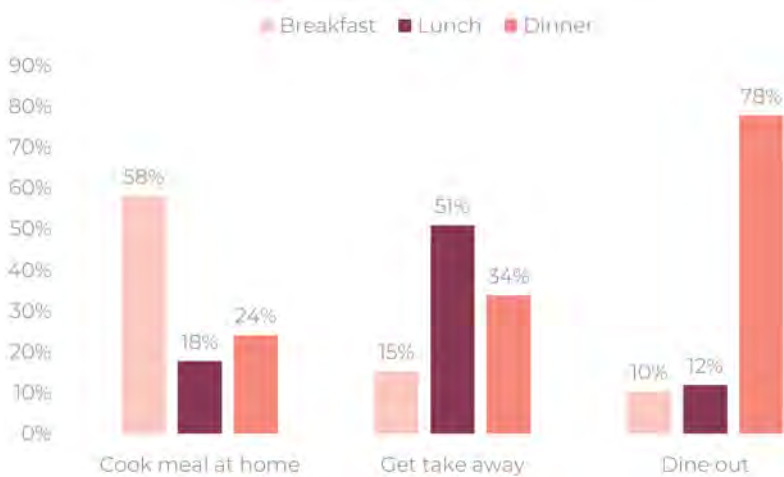
ACCOMMODATION SEGMENT OPPORTUNITIES

- The Selective Traveller and Adaptable Adventurer are the key accommodation segment opportunities for the King Valley. These markets have preferences for higher quality accommodation, whereas the Carefree Explorer is unphased by their accommodation and will continue to visit the King Valley regardless of accommodation options.
- The Adaptable Adventurer provides a major market opportunity, as they will pay between \$200-300 a night for accommodation but are flexible with the accommodation type (within reason) if it allows them to visit the King Valley.
- The Selective Traveller market segment provides the highest yield opportunities – they are willing to spend between \$300-400 a night. A larger proportion prefer to stay in upscale and midscale hotels, as well as in luxury accommodation.
- Delivery of hotel accommodation and more luxury offerings will assist to attract the Selective Traveller who seeks greater levels of service, facilities, amenities and in-house dining and bars.
- Inclusion of luxurious elements such as in-room baths and surprise delights such as local produce in-room will satisfy the Selective Traveller and keep them returning to the King Valley.
- Across all market segments, travellers prefer to be close to the nearest town and nearby attractions.

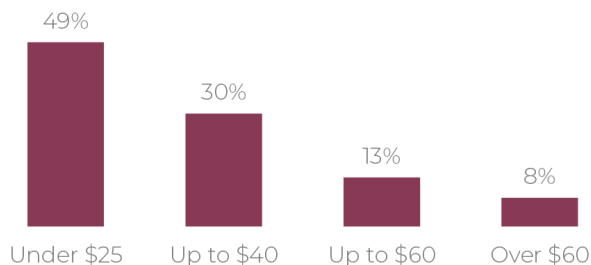


FOOD AND DINING MARKET

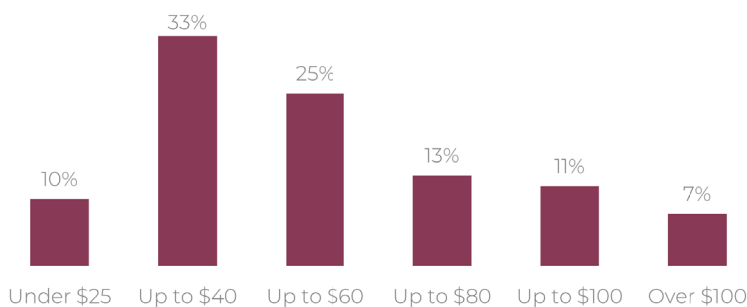
Typical meal preferences when travelling to regional Victoria for an overnight holiday



Preferred pricepoint



LUNCH



DINNER

FOOD AND DINING PREFERENCES

Key findings from the High Country food and dining market research are shown below, as relevant to the King Valley.

- Most visitors will only book a meal in advance if it is known to be very busy or have limited seating, however keep an eye on dining options whilst pre-planning.
- High preference to dine out for dinner (78%) however very limited dinner options in the King Valley, particularly midweek, creating a negative visitor experience and potentially impacting repeat visitation.
- Most visitors will plan or book one meal a day (usually dinner), but otherwise “dining is secondary”. Visitors mostly plan dining around their activities and where they will be.
- Visitors perceive the King Valley food and service to be hospitable and relaxed and they like the King Valley for this reason.
- Whilst there is some preference for mainly Italian and Modern Australian cuisines, most markets just want to experience quality local produce.
- A large proportion (68%) of the Victorian market wouldn't pay more than \$60 per person for dinner on a typical meal whilst on holiday in regional Victoria.
- High preference across all markets (70-80%) for takeaway lunch or picnic at a beautiful nature-based location in the High Country. This provides an opportunity for private investment in farmgate takeaway produce packages and curated picnic experiences.
- The vast majority of travellers would only be willing to travel up to 15 minutes for their preferred food experience. Unsurprisingly, those who place more importance on food for positive travel experience are willing to travel further for quality dining experiences.

EXPERIENTIAL QUALITIES SOUGHT IN DINING EXPERIENCES

Visitors seek relaxed setting, country and winery views and quality food/produce, not necessarily 'fancy' meals and dining settings.

Common amongst all segments is preference for a relaxed setting, warm and friendly service and atmosphere, and views of nature or feeling of an escape to the countryside.

"We want to experience local stuff, not necessarily higher-class restaurants - we go away from the city to avoid that kind of environment"¹

PRECEDENT: Pepes Italian and Liquor, Melbourne



PRECEDENT: The Farm, Byron Bay



¹ Quote taken from past visitors who responded to intercept surveys and participated in focus groups.

FOOD AND DINING MARKET SEGMENTS

Food and Dining market segmentation has been prepared by Urban Enterprise for Victoria's High Country. An overview of these segments and their preferences has been provided below.

Market Segments

Segment Overview

Ultimate Foodie (16%)



Will plan their days around food experiences and will not stay in a destination if the food and dining options aren't up to scratch.

"Eat our way through the day"

"We usually plan our day around where we want to have our meals"

Flexible Foodie (37%)



Highly value a food experience and will build a food experience into their trip, but food isn't necessarily a main motivator.

"We plan our days around what activities we'd like to do with an eye on good quality dining options nearby"

Occasional Indulgence (23%)



Want one nice meal on their trip but are not visiting for the purpose of food and dining.

"I'll go out for one special meal whilst I'm away and I tend to plan this in advance, then I want the rest to be quality but nothing too fancy"

Vegemite and Toast (24%)



Food is not important to their travel experience or satisfaction.

"I don't really care what I eat - I am there to see the destination"

Preference Overview

- Prefer to dine out for all meals of the day
- Compared to other segments, more likely to dine out for lunch
- Willing to spend more than \$60 on lunch (16%) and more than \$100 on dinner (15%)
- More likely to partake in a degustation or dine at a restaurant with a set menu, in comparison with other segments of the markets
- Highly value local produce and will pay more for it (35%)
- Like to be served attentively by waiters (44%)
- Happy to travel further than other segments for a good meal - 22% will drive more than 45 minutes for their preferred dinner
- Prefer to dine out for all meals of the day, like to get take away or dine out for lunch, and dine out for dinner
- Prefer to pay up to \$40 for lunch (33%) however more inclined to spend up to \$60 on dinner (28%) or up to \$80 (14%)
- Like to enjoy their lunch out in nature whilst undertaking activities and seeing sights, however still enjoys dining out for lunch
- Local produce is important (26%) and will pay more for it (26%)
- 53% wouldn't pay more than \$25 for lunch and 36% wouldn't be willing to pay more than \$40 for dinner
- Higher level of ambivalence towards their typical dining experiences
- Seek out one nicer meal on a trip but otherwise is content with a casual pub meal
- Will not pay more for local produce (34%) and less so interested in hearing about the local story (54%)
- Least interested by local stories and local produce
- Prefer not to be disturbed by wait staff when dining out
- More likely to preference cooking at their accommodation while travelling than all other segments
- Low spending - will pay maximum \$25 for lunch and \$40 for dinner
- Not interested in fancy food experiences - over 50% completely disinterested in set menu or degustation experiences

FOOD AND DINING SEGMENT OPPORTUNITIES

- Dining out is the preferred choice for dinner across all segments of the market, therefore the King Valley needs to provide a greater range of dinner options to meet visitor expectations.
- A high proportion of Ultimate Foodies and Flexible Foodies will dine out for breakfast, highlighting need to improve the breakfast options and quality of coffee and cafe experiences.
- Compared to other travellers, Ultimate Foodies are more likely to dine out for lunch and Flexible Foodies are more likely to enjoy takeaway food at a scenic location. This provides opportunity for development of hampers and takeaway produce boxes.
- Across all market segments, travellers enjoy a la carte dining. Ultimate Foodies are more likely to partake in a degustation or dine at a restaurant with a set menu.
- The Ultimate Foodie and Flexible Foodie are the key food and wine segment opportunities for the King Valley. These markets are well suited to the high-quality produce and farmgate experiences offered. Delivery of more 'foodie' experiences, including higher quality and some more curated experiences, will assist to attract this market.
- These market segments provide the highest yield opportunities – they are willing to spend more on both lunch and dinner than other segments. A larger proportion of Ultimate Foodie and Flexible Foodie's prefer to stay in upscale and midscale hotels, as well as in luxury accommodation.
- Across all market segments, travellers like a relaxed setting but are comfortable with fine dining. The King Valley should retain a hospitality experience of 'casual luxury', which should be translated into fitouts, hospitality, branding and food quality.



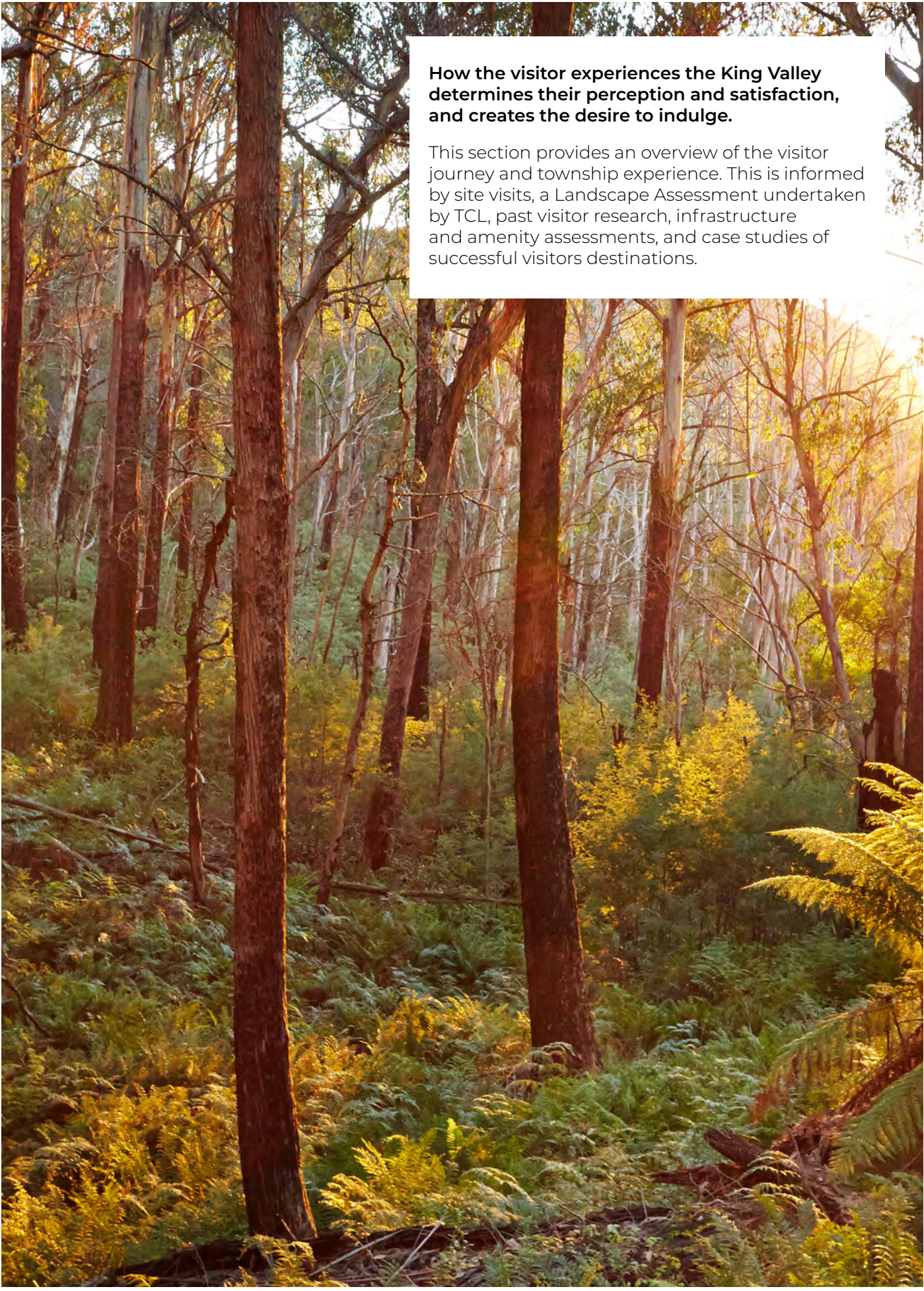
KEY FINDINGS

- The King Valley Region attracts 590,000 annual visitors who spend \$162 million across the region. These visitors generate economic output of \$268 million and 1,267 jobs for the Hume Region.
- The region sees mostly daytrip visitors (59%) due to the lack of commercial accommodation, impacting visitor yield.
- Visitor demand is strong, with 38% of Australians who have heard of and are interested in visiting the King Valley. Visitation is projected to double by 2032.
- Past visitors seek improvements to amenity and infrastructure, including roads, visitor amenities such as toilets, parks, bins, drinking taps, and telecommunications.
- Dining out is the choice for dinner across all segments of the market. The King Valley currently lacks dinner options for visitors and as such, does not meet visitor expectations.
- Access to local produce is important to the visitor market, and many are willing to pay more for it.
- Visitors seek a relaxed and casual dining setting, with views of the natural landscape, wanting to avoid a fancy setting that can be found in the city.
- Accommodation is an important motivating factor for trip bookings. Visitors seek accommodation that has experiential qualities, integrated with the landscape providing a feeling of 'escaping' from the city to nature.
- Visitors seek upscale and boutique hotels when travelling to the High Country for their levels of service quality and experience of luxury.
- Visitors seek quality holiday park and self-contained options to suit their travel party groups.
- The historic lack of midweek visitation and seasonality of visitation has impacted the ability to attract commercial accommodation operators.

RECOMMENDATIONS

- **Invest in products, experiences and accommodation that will grow the overnight visitor market and generate additional visitor yield.**
- **Deliver high quality visitor infrastructure and amenity, which will appeal to new and existing visitors, and increase the length of stays and spend in the region.**
- **Invest in high quality and experiential overnight accommodation, in particular boutique hotels and high quality holiday parks. This will grow the overnight visitor market and solidify the region as a premium wine destination.**
- **Deliver high quality food and dining options, including improved access to farmgate experiences and quality restaurants and cafes, to satisfy visitors.**
- **Ensure commercial development amplifies and integrates with the natural environment to provide visitors with a feeling of intimate luxury and escape to nature.**

EXPERIENCING THE KING VALLEY



How the visitor experiences the King Valley determines their perception and satisfaction, and creates the desire to indulge.

This section provides an overview of the visitor journey and township experience. This is informed by site visits, a Landscape Assessment undertaken by TCL, past visitor research, infrastructure and amenity assessments, and case studies of successful visitors destinations.

LANDSCAPE EXPERIENCE

The following landscape assessment has been prepared by TCL.

The landscape of the King Valley has a number of distinct characteristics. From North to South these landscape types overlap, layer and bleed into one another, creating a spectacular drive and reinforcing a varied journey, product and produce through the King Valley.

Broadly speaking, we can categorise four different typologies:

Agricultural Experience



The northern end of the King Valley is characterised by its pastoral landscape with grazing cattle sitting in front of rolling hills.

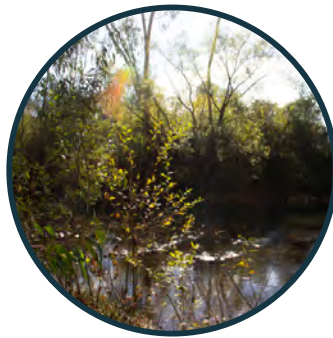
Sitting within the bounds of Oxley, Milawa and Moyhu the landscape is reflective of it's renowned produce.

Township Experience



The unique character and product found in each township illustrate the many narratives of the King Valley. The scale and materiality of these places speaks to the authenticity, generosity and craftsmanship that the King Valley holds.

Valley Experience



From Moyhu south, the mountainous qualities of the King Valley begin to truly announce themselves. Being at the bottom of the valley accentuates the form and enormity of the landscape, providing an all encompassing vantage point.

Winery Experience



Vineyards present themselves in the King Valley from south Edi to Cheshunt. Views into wineries and vineyards in particular build into the experience of driving through the King Valley. They begin to draw visitors into narratives of immigrant histories, Italian wine making in particular.

LANDSCAPE EXPERIENCE



LANDSCAPE EXPERIENCE

Moyhu

Edi

Edi Upper



6

The Charles Schultz Reserve sits open to adjacent Cafe and Dining options - providing an inviting space for a picnic.



9

From Moyhu to Edi the valley announces itself.



7

Moyhu silo has a strong presence within the streetscape, a key marker whilst driving through.



10

Glimpses of the River emerge as you pass through the campsite. Shallow edges invite adventure and exploration.



8

Approximately 1km from Moyhu Centre, this site provides easy access to the King River. Mature trees along the rivers edge creates an immersive and relaxing space.



11

Cottages within Whitfield illustrate built heritage, with only a couple of existing trees and informal gardens creating a walkable and welcoming streetscape.

LANDSCAPE EXPERIENCE

Whitfield

Cheshunt



12

The Hobbledehoy Cafe and Distillery, Mountain View and King Valley Fine Foods create a centre for Whitfield. This intersection is car dominated with only glimpses of the existing character and offerings available.



15

A small parkland sits in front of the Cheshunt Public Hall. Set back from the existing Cheshunt Streetscape, this park is currently disconnected from the General Store and Cafe.



13

From Whitfield to Cheshunt, long range views to distant mountains (Warby Ranges, Mount Bufalo and Mount Buller) highlight the many natural assets of the King Valley.



16

William Hovell Dam: This immense landscape speaks to the history and production of the King Valley. A vast landscape nestled in by surrounding mountainous landscape.



14

Whilst driving into Cheshunt there is a glimpse of the King River, it's rocky banks and an adjacent parkland.



17

Heading out of the King Valley towards Mansfield all the layers of the King Valley come together: cattle, vineyards, towering Eucalypts and colourful Oaks with mountainous backdrops.

THE VISITOR JOURNEY

TRAVEL PATTERNS

The past visitor research conducted by Urban Enterprise identified key travel patterns.

The following page illustrates the visitor journey and highlights key locations where visitors both orient themselves and first experience the King Valley.

There are multiple gateways into the region, highlighted on the following map.

The key arrival nodes are the Oxley gateway and the descent from Whitlands into Whitfield, however, these locations lack an arrival experience.

PRIMARY ARRIVAL EXPERIENCES

The most important gateway to the region is the Oxley roundabout, through which 39% visitors enter the region. This includes visitors entering from Wangaratta and from Melbourne from the Hume Highway.

Visitors entering through the roundabout can observe the change in landscape from the urban city centre into the agricultural and winery landscape. The roundabout also marks the point of divergence between the Upper and Lower regions of the King Valley.

Whitfield is an equally important gateway, through which 30% of visitors enter. This gateway includes those coming from Mansfield via Mansfield-Whitfield Road or Benalla through Tatong-Tolmie Road.

Delivery of signage and sculptural interventions at these locations will provide visitors with a sense of arrival into the King Valley, provide wayfinding and create a photo opportunity to encourage user-generated content.

A. Oxley Gateway



Oxley Roundabout - Northern gateway to the King Valley

EXPERIENCE OF PLACE

The visitor currently has a fragmented and unclear experience of the King Valley brand whilst in the region.

The region lacks a distinct King Valley brand in both its built form and its digital presence. Key issues include:

- Lack of clear gateway signage to denote entrance into the King Valley.
- No sense of arrival into the King Valley, a premium visitor destination. The region lacks sculptural gateway interventions that provide a sense of arrival, reinforce the sense of place and strengthen the King Valley brand.
- Confused understanding of place, proliferated by the use of the Milawa Gourmet Region signage in the Upper King Valley and obsolete "Welcome to the King Valley" signage located in Edi.

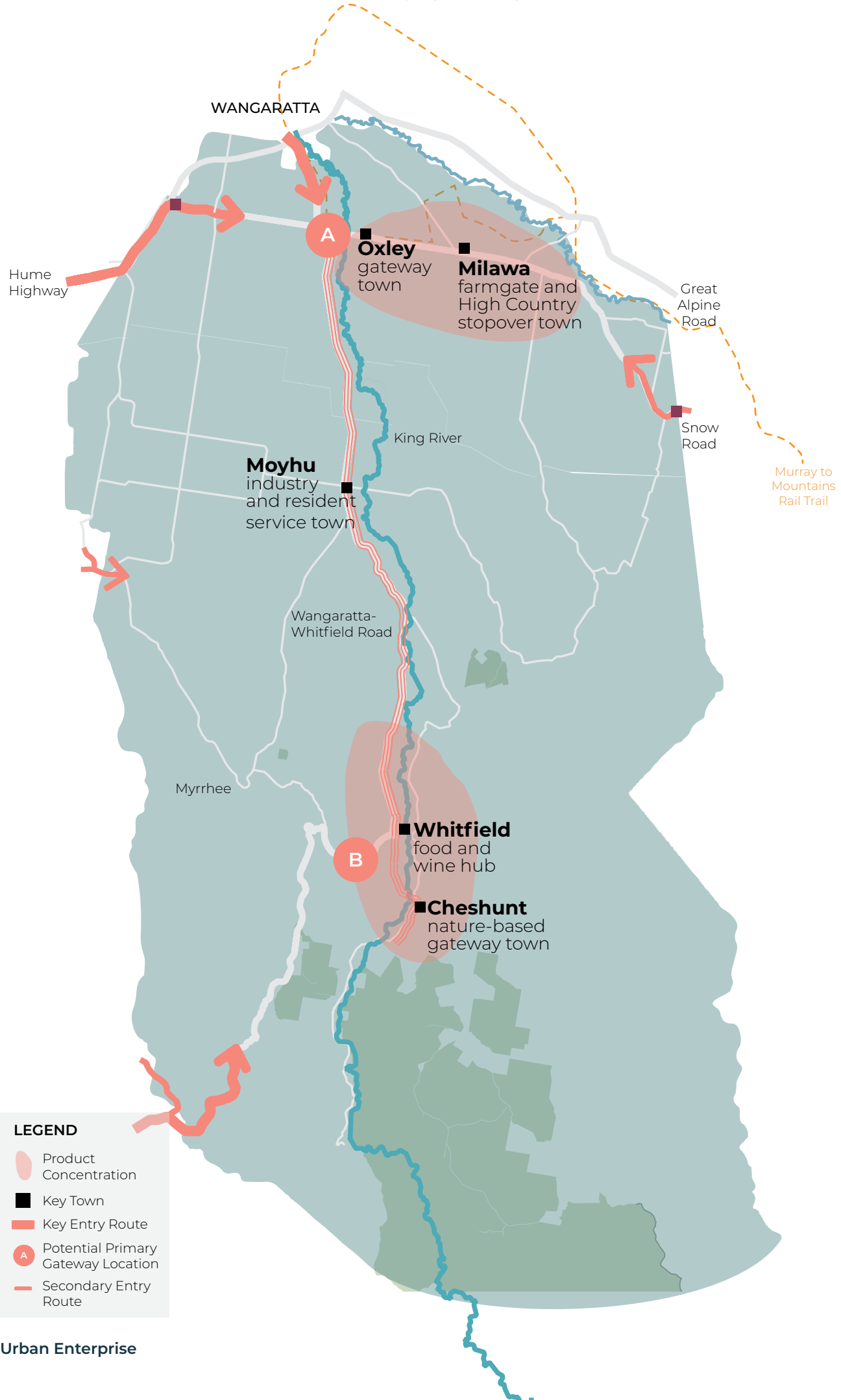
The consumer market has a growing awareness of the King Valley and interest in visiting (38% of the Australian market). Consumer awareness research highlighted that the Milawa Gourmet region had the lowest awareness amongst all the Australian food and wine regions tested.

This highlights that King Valley is the 'place' and overarching regional brand that is well-recognised by visitors. The region should lead with the King Valley brand, which has the greatest consumer recognition and potential for growth in awareness.

B. Whitfield Gateway



Whitfield Gateway: Potential location along Mansfield-Whitfield Road



LEGEND

- Product Concentration
- Key Town
- Key Entry Route
- A Potential Primary Gateway Location
- Secondary Entry Route

AMENITY AND INFRASTRUCTURE ASSESSMENT

ROADS

Key arterial roads are the Wangaratta-Whitfield Rd, linking the valley from north to south, and Snow Rd from east to west. Both roads are the responsibility of Regional Roads Victoria.

Over 1.3 million people travel along Snow Rd annually, with an additional 700,000 travelling on Wangaratta-Whitfield Rd¹.

Wangaratta-Whitfield Rd has seen a significant increase in traffic over the past 10 years and the road is often cited by residents, industry and visitors as dangerous and needing upgrades, including widening and shoulders.

The King Valley Infrastructure Project, undertaken by a dedicated group of local residents, identifies a range of enhancements needed to ensure safety of the road. This includes widened shoulders, improvements to blind spots and resealing of the road in sections.

In addition, commentary from community members and stakeholders indicates interest in renaming Wangaratta-Whitfield Rd to either Prosecco Rd or King Valley Rd. 75% of residents strongly agree or somewhat agree with renaming the road to King Valley Rd.

There is also 5km section of gravel road in Myrrehe, linking Benalla to Whitfield, which requires sealing to provide an alternative access route. There is an application currently underway for funding to seal this road.

¹ Vic Roads, Traffic Volume, 2020.



VISITOR TRAVEL SERVICES

The region lacks public transport access for visitors, as well as alternative travel services such as taxis, Ubers or private shuttles.

A regional coach between Wangaratta and Cheshunt services residents however is infrequent and unsuitable for visitors as it only operates twice a day.

A transport solution is required to safely transport visitors between wineries and other attractions. This should be investigated as a priority to facilitate visitation growth.

STREETSCAPE AND AMENITY

The King Valley lacks the township amenity, streetscaping and high quality public infrastructure required to deliver a premium visitor experience.

Key streetscape and amenity challenges include:

- The region is not pedestrian friendly, with a lack of or incomplete network of footpaths, shared paths or pedestrian crossings in all towns.
- Streetscaping is poor in all towns, with a lack of street trees, plantings, or landscaping.
- Unsafe streets at night due to lack of lighting. The combined lack of walking paths and lighting results in visitors walking on 100 km/hr roads in the dark.
- Insufficient and informal street parking. Upgrades needed to accommodate existing visitation and facilitate visitation growth.

Streetscaping, amenity and signage found in the adjacent Alpine Shire and in the city of Wangaratta provide an aspirational target for the King Valley, which will require public sector investment in streetscape and amenity improvements.

SIGNAGE

There is a lack of consistency in the type and quality of wayfinding signage across the region.

Key signage issues include:

- All towns lack quality directional and business signage to guide visitors through the region.
- Lack of gateway entry signage to the King Valley and confusing gateway signage located mid-region at Edi (pictured below).
- Confusion between destination signage branding i.e. Milawa Gourmet Region and King Valley.
- Poor consistency and quality of tourism and winery business signage.
- Obsolete signage that requires removal.

Milawa Gourmet Region Tourism Association has historically delivered signage for use at businesses in Milawa and Oxley. This creates inconsistency with the Upper King Valley and creates confusion as to whether businesses are in the King Valley or Milawa Gourmet Region. This is pictured below.

The Rural City of Wangaratta is currently upgrading town signage for towns across the Shire. In addition, the following signage improvements are recommended:

- Removal of Milawa Gourmet Region business and destination signage
- Audit of tourism directional signage and update
- Improved business signage
- Delivery of gateway signage to demarcate entry to the region

Tourism signage should be streamlined to reflect the King Valley brand and to be consistent across the valley.



Milawa Gourmet Region Signage
Source: Urban Enterprise



Welcome to King Valley Signage located in Edi
Source: THL Library

INFRASTRUCTURE AND PLANNING

There are a range of infrastructure and planning constraints to development across the King Valley.

Common challenges across the region include:

- Minimum lot size requirements of the farming zone limiting tourism development.
- All towns have a limited amount of zoned commercial and residential land for development.
- Poor telecommunications infrastructure, high number of blackspots and low bandwidth.
- Lack of zoned land for residential development in the Upper King Valley impacting ability to house a local workforce and as a result, constrains business growth.

Whilst Whitfield has the greatest potential to develop into a thriving tourist town, it also faces a number of infrastructure and planning constraints which result in a lack of developable land. Key constraints include a lack of reticulated town sewerage or water, lack of vacant sites for development, and building restrictions of the Bushfire Overlay.

Similarly, development in Cheshunt is constrained by lack of reticulated town sewerage or water, Bushfire Overlay, Flood Overlay and required setbacks from waterways.

These land constraints result in a lack of land for development of visitor accommodation, products and experiences, and visitor services.

TOWNSHIP EXPERIENCES

MILAWA

CURRENT ROLE

Milawa is the anchor town of the Lower King Valley. Milawa is located on Snow Road and captures many daytrip visitors travelling to and from the High Country region.

Key drivers for visitation to Milawa include Milawa Cheese and Brown Brothers.

CURRENT STATE

Milawa has the highest quality streetscaping and amenity of all towns, with street trees, landscaping, footpaths and formalised curbs enhancing the amenity of the town.

The intersection has a distinctive heritage streetscape with a selection of shops, cafes, and bakeries, including the historic Milawa Hotel, Milawa Providore and Milawa General Store.

However, improvements to the town are still required, including:

- Pedestrian crossings.
- Formalised bus parking on Snow Road, east of the intersection at Milawa-Bobinawarrah Road.
- Delivery of formal parkland, which could be developed along the road reserve located at the intersection of Snow Road and Milawa-Bobinawarrah Road.
- Additional street parking to accommodate existing visitation or facilitate visitation growth.

Many businesses in the area currently carry the Milawa Gourmet Region signage. This creates inconsistency with the Upper King Valley and creates confusion as to whether businesses are in the King Valley or Milawa Gourmet Region.

The town also has access to reticulated water and sewerage and has good potential for further development.

Potential Role & Character

Milawa is the hub of the Lower King Valley, attracting visitors travelling across the High Country for farmgate produce, winery experiences and a heritage town experience.

Milawa and Whitfield will be unified as the anchors of the King Valley, focusing effort on the King Valley brand to establish a strong and clear destination presence.

Milawa will be an attractive and well-connected town.



Shops and existing streetscape at the Snow Rd and Milawa - Bobinawarrah Rd intersection, Milawa



Vacant commercial site at the Snow Rd and Milawa - Bobinawarrah Rd intersection, Milawa

OXLEY

CURRENT ROLE

Oxley is a gateway town, the first town visitors enter when visiting the King Valley from the Hume Highway.

Like Milawa, Oxley has a number of dining and farmgate experiences including Blue Ox Blueberries, King River Café, and wineries such as Sam Miranda and John Gehrig Wines.

The Murray to Mountains Rail Trail extends from Wangaratta via Oxley, connecting Milawa to Oxley via Snow Road. The trail link to Everton allows Oxley visitors to explore the wider region via the routes to Beechworth or Bright.

CURRENT STATE

The town lacks gateway entry signage that is needed to provide visitors with a sense of arrival and mark Oxley as the first town in the Lower King Valley region.

Like Milawa, many businesses in Oxley carry the Milawa Gourmet Region signage. This creates inconsistency with the Upper King Valley and creates confusion as to whether businesses are in the King Valley or Milawa Gourmet Region.

The town has some dedicated cycling paths (part of the M2M rail trail) but requires additional signage and landscaping improvements including plantings, streetscape enhancements, and pedestrian crossings. This will help enhance the visitor experience and improve safety for cyclists passing through the town.

The existing memorial park in Oxley has some outdated amenity including toilets, signs, and picnic benches, and requires upgrades in order to be attractive to visitors. A trailhead for the Prosecco Trail has been proposed for this location.

The town has access to reticulated water and sewerage, and has sufficient zoned land for development.

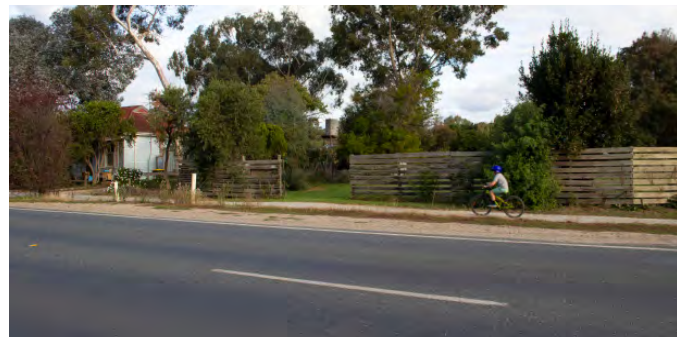
Potential Role & Character

Oxley will provide an attractive gateway to the King Valley, signifying entry to a premium food and wine region.

The town will support expansion of farmgate tourism experiences in the Lower King Valley, playing a supporting role to Milawa.



Milawa Gourmet Region entrance signage in Oxley



Existing Trail path in Oxley



King River Cafe in Oxley

MOYHU

CURRENT ROLE

Moyhu is primarily an industry and resident service town.

For visitors, the town is a logical stopover between Milawa/Oxley and Whitfield/Cheshunt. Moyhu is a gateway to the Upper King Valley, marking the change from the flat agricultural plains of Oxley to a narrowing valley experience.

The town lacks compelling visitor experiences, however attracts a small number of visitors with its small accommodation base (Moyhu Hotel and Moyhu Caravan Park), cafe, pub and access to the King River.

CURRENT STATE

Streetscaping is poor in Moyhu with a lack of street trees, planters, grass or other landscaping along the main street.

The town could benefit from improved wayfinding and signage to direct visitors to public spaces such as Moyhu Lions Park and the King River frontages.

The town is not pedestrian friendly, with key issues including:

- Lack of footpaths and shared paths, particularly on the east side of Wangaratta-Whitfield Road.
- Requires pedestrian crossings along Wangaratta-Whitfield Road to connect key businesses.
- Inadequate lighting.

Existing public green spaces in the town include the Carl Shultz Reserve and Moyhu Lions Park. Both reserves are underutilised and have outdated amenity, including toilets, signs and picnic benches. The Carl Shultz Reserve additionally has poor pedestrian access, lack of landscaping, and low visitor amenity. The Carl Shultz Reserve requires some upgrades in order to be attractive to visitors.

Of the Upper King Valley towns, Moyhu has the greatest potential for residential development. The town is connected to reticulated water and sewerage, and has zoned land for development.

Potential Role & Character

Moyhu will be a hub for residential, community and industry development, capitalising on the towns development potential as a result of access to sewerage and water infrastructure, and zoned residential and commercial land.

Importantly, Moyhu will facilitate tourism growth in the Upper King Valley by providing staff housing and services for residents. Moyhu will become activated by residents, which in turn will encourage private sector investment and grow the surrounding tourism offering.



Moyhu 'Beach' Reserve along the King River



Opportunity for greater usage of Carl Schultz Reserve

WHITFIELD

CURRENT ROLE

Whitfield is the principal town of the Upper King Valley. It is the hub for surrounding food and wine experiences, including Dal Zotto, Pizzini, and Mountain View Hotel.

The town has a general store, a pub, cafes, and is supported by a small accommodation base including the Gentle Annie and Valley View caravan parks, motels, holiday rentals and B&B's.

Whitfield is a gateway for visitors travelling to the King Valley via the Mansfield-Whitfield Road.

CURRENT STATE

Whitfield currently lacks the township amenity and beautification required to deliver a high quality visitor experience and encourage visitors to stay longer in the town.

Key issues include:

- Poor streetscaping; lack of street trees, planters, grass and other landscaping. Existing landscaping is poorly maintained.
- Incomplete network of footpaths, lack of shared paths and lack of pedestrian crossings.
- Lack of formalised street parking to encourage stopovers. Key opportunities for formalised parking include at the Whitfield Road Reserve and the reserve area in front of the Hobbledehoy Cafe.
- Lack of gateway entry signage to create a sense of arrival.
- Some low quality and rundown building stock.
- Unsafe road conditions, particularly the intersection of Mansfield-Whitfield Road and King Valley Road.
- Poor amenity at the town's park (Whitfield Road Reserve), including outdated and unattractive toilets, signs, shelter and picnic benches.
- Poor telecommunications infrastructure and lack of connectivity impacting visitor satisfaction and business growth.
- Constraints to development due to lack of reticulated town sewerage or water, lack of vacant zoned land for development, and building restrictions of the Bushfire Overlay.

Whilst Whitfield has the greatest potential to develop into a thriving tourist town, it also faces the greatest number of infrastructure and planning constraints. Investment in sewerage and streetscaping will unlock development potential for Whitfield.

Potential Role & Character

Whitfield is the heart of the Upper King Valley, providing a hub for visitors to base themselves and explore the bounty of wine, food, produce and nature.

A boulevard of trees, lights and paths will provide a backdrop for a vibrant town centre, offering an experience of casual luxury by day, into a romantic and indulgent night-time playground of restaurants, bars and desserts.



Existing Whitfield Streetscape



Whitfield Road Reserve



T-Intersection at Mansfield - Whitfield Rd and King Valley Rd

CHESHUNT

CURRENT ROLE

Cheshunt is the gateway to the King Valley's nature-based attractions, including Lake William Hovell and Alpine National Park

Situated near the King River, with grassed picnic areas and swimming holes, the township services visitors with a general store, bakery and public toilets.

CURRENT STATE

Cheshunt has poor streetscaping, particularly due to lack of footpaths or formal parking.

There is a need to provide formalised street parking and pedestrian footpaths on both sides of the main street to improve accessibility and safety for pedestrians. Areas that particularly need improvement include in front of The Oven At Cheshunt and the Cheshunt Public Hall site.

Cheshunt also lacks a formal park. There is an opportunity to develop the existing Public Hall site across from The Oven At Cheshunt, which is already established as a stopover point for visitors. Existing amenity includes a toilet block, seating and a signage board, but could be enhanced with landscaping, small scale playground and picnic spaces.

Development in Cheshunt is constrained by lack of reticulated town sewerage or water, Bushfire Overlay, Flood Overlay and required setbacks from waterways.

Potential Role & Character

Cheshunt will be the gateway to the King Valley's nature-based assets, supporting Whitfield as a quaint sister town that is intrinsically linked to the King River.

A well-landscaped and vibrant town centre will provide connection to nature, with high quality dining and boutique retail establishments nestled into the surrounding landscape, enhanced parkland, walking and cycling links, and improved access to the King River.



Need for enhanced signage for nearby attractions



Need for pedestrian walkways - potential for wheelstops



Poor landscaping at Cheshunt riverfront parkland.

COMPARATIVE ASSESSMENT OF TOWN INFRASTRUCTURE AND AMENITY

All towns require significant improvements to public infrastructure and amenity in order to enhance the visitor experience as well as support private sector investment.

Lack of reticulated town sewerage is a major impediment for tourism and residential growth in Whitfield and Cheshunt. These towns lack the required infrastructure and amenity, however have most potential for growth due to their landscape, proximity to and concentration of visitor destinations and experiences.

KEY



Exists



Needs improvement



Does not exist

	Milawa	Oxley	Moyhu	Whitfield	Cheshunt
Land Supply to Support Commercial Tourism Development in Townships	✓	✓	✓	✗	✗
Reticulated Sewerage	✓	✓	✓	✗	✗
Reticulated Water	✗	✓	✓	✗	✗
Adequate Drainage	—	✓	—	✗	✗
Street Parking	✓	—	—	✗	—
Footpaths	✓	—	—	—	✗
Landscaping and vegetation	✓	✓	—	✗	—
Quality public toilets	✗	✗	✗	✗	✗
Pedestrian crossings	✗	✗	✗	✗	✗
Signage	—	—	—	—	—

CASE STUDIES

ALPINE BETTER PLACES

Alpine Better Places is a program of township revitalisation projects for towns in Alpine Shire. Streetscaping, signage, amenity blocks (toilets, water fountains, bins, seating), lighting and landscaping have rejuvenated the towns.

Importantly, the Shire has seen significant economic growth in private sector investment since investing in their townships.

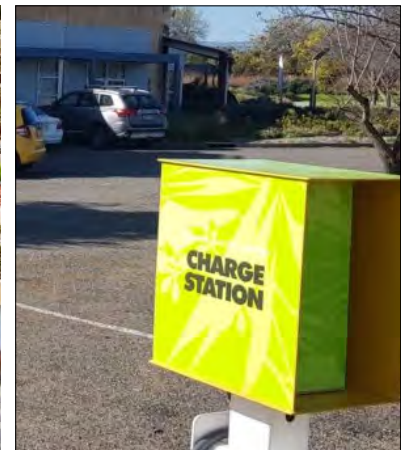
It is recommended that the Rural City of Wangaratta takes a similar approach to township enhancement moving forward.



MCLAREN VALE

McLaren Vale is a premium wine region which has reinvigorated itself in recent years through investment in its towns, infrastructure, product development and marketing. The region is now positioned as one of Australia's most contemporary and exciting wine regions.

The City of Onkaparinga has continued to invest in the region's towns to ensure that whilst diverse in their offerings, the quality and feeling of the towns is unified through streetscaping and landscaping.



KEY FINDINGS

- The King Valley provides a layered experience of agriculture, wineries, townships and mountains.
- Key entry points to the King Valley are via the Oxley Roundabout and Mansfield-Whitfield Road.
- King Valley townships lack the required visitor amenity, streetscaping and high quality infrastructure expected of a tourism destination. Enhancement of townships is critical to building a premium visitor destination and strengthening the King Valley brand and perception.
- Poor quality of key arterial roads impacts visitor confidence and perceived safety.
- Poor transport access and connectivity, particularly in terms of cycling and walking paths, poor road quality and unsealed entry roads, and lack of public transport options for visitors.
- Poor amenity, streetscaping, signage, limited formal parking and lack of connectivity between businesses impacts investor confidence.
- Development in Whitfield and Cheshunt is constrained by lack of zoned land to support new residential and commercial developments, lack of reticulated water and sewerage, Bushfire Overlays and Flood Overlay and waterway setback requirements (Cheshunt only).
- Lack of residential land for development constrains business growth due to inability to house staff.
- Moyhu can play an important role in residential development, having reticulated water and sewerage, and zoned land supply to support some residential development. Moyhu can also act as a servicing hub for residents and visitors, due to the location as a bridge between the Upper and Lower King Valley, and ability to support immediate investment.

RECOMMENDATIONS

- **Invest in gateway experiences to reinforce entry to the King Valley at key locations of Whitfield and Oxley roundabout, as well as reinforcing key secondary entry points.**
- **Deliver clear and cohesive tourism signage to enhance the visitor experience and journey.**
- **Public sector investment in quality streetscaping and amenity across the region, with architectural design that amplifies the King Valley landscape.**
- **Deliver a suite of improvements to the Wangaratta-Whitfield Rd, and provide for off-road cycling connection between Oxley and Cheshunt, to ensure safety for visitors and residents.**
- **Prioritise investment in Cheshunt and Whitfield, which will provide the greatest return for the King Valley due to the concentration of products, experiences, accommodation and natural assets.**
- **Reinforce the role of Milawa and Whitfield as tourism hubs for the region.**
- **Unlock investment potential of Whitfield through delivery of a sewerage solution, investment in streetscaping, a new town centre intersection to enhance safety, and trails and footpaths to enhance connectivity between businesses.**
- **Encourage residential development in Moyhu to facilitate tourism growth in the Upper King Valley by providing staff housing and services for residents.**

PRODUCT AND EXPERIENCE ASSESSMENT

Products and experiences are the foundation of the King Valley visitor experience.

This section provides a detailed assessment of the King Valley product and experience profile, including tourism strengths, emerging opportunities, and gaps in offering.



PRODUCT STRENGTHS

WINE AND WINERIES

18

Wineries

15

Cellar Doors

5

Restaurants

Quality wine and a warm, authentic experience is why visitors are drawn to the King Valley.

Wine and wineries are the main motivator for visitation to the King Valley for 60% of past visitors.

The region has strengths in a range of Italian varieties, including Prosecco, Sangiovese, and Nebbiolo.

The King Valley has developed a reputation for Prosecco. 180 acres of prime King Valley land are planted with Prosecco currently, representing 64% of all Prosecco plantings in Australia. The high elevation in the upper King Valley with vineyards above 800m provides a climate very similar to the Veneto Region in Northern Italy, which is home to the Prosecco grape.

The Italian families that settled in the King Valley moved into grape growing following changes to tobacco industry regulations leading to the establishment of the region growing Italian grape varieties.



The wine industry has historically been driven by the five key players: Brown Brothers, Chrismont, Dal Zotto, Pizzini, and Sam Miranda. These wineries were the earliest to develop in the King Valley, with Dal Zotto being the first to plant the Prosecco grape in 1999.

Today, the winery experience has expanded, with cellar doors and restaurants developing over the past 20 years to reach an offering of 18 wineries, 15 cellar doors and 5 restaurants. There are also additional plantings from other wineries located outside the region, choosing to grow grapes in the King Valley because of the high quality agricultural land.

Cellar door experiences are now offered by the majority of wineries.

Brown Brothers, Dal Zotto, Chrismont and Gracebrook are key wineries with restaurants open for lunch. Dal Zotto also opens for dinner on a Friday night. There are no night-time winery experiences otherwise, either in terms of a bar or a restaurant.

The cellar door experience varies greatly across the region. Some cellar doors are small scale and informal, whereas other cellar doors have high quality, structured tastings.

There is a need for improvements to the cellar door experience across the region to ensure visitors receive a premium experience. This includes need for more contemporary and high quality indoor and outdoor furniture, improved landscaping and presentation, and differentiation of business offerings to provide a breadth of experiences for the visitor market.

Brown Brothers Restaurant





Milawa Cheese Offerings

FOOD AND PRODUCE

High quality food and farmgate produce is bountiful across the region, with fertile soils producing a range of crops and agriculture. Key local produce offerings include dairy, beef, olives, berries, mustard, jams, and more.

Milawa Cheese and Milawa Mustards are the famed farmgate produce offers, attracting visitors to the Lower King Valley. Tastings and purchases are available through the Milawa Cheese Factory Complex. This complex also includes the popular Milawa Bread and Milawa Kitchen, with artisan bakery and cafe. King Valley Fine Foods in Whitfield also provides an opportunity to purchase local produce. There are limited opportunities outside of this to experience local produce.

Lunch dining experiences are provided at Brown Brothers, Dal Zotto, Chrismont and Gracebrook. Other lunch, coffee and takeaway options include The Oven at Cheshunt, the Milawa Bakery, Hobbledehoy Cafe and Distillery in Whitfield, King River Cafe in Oxley, and Ineeta Cafe in Moyhu.

There is a lack of dinner options across the valley. The only consistent dinner offerings in the Upper King Valley are the Mountain View Hotel and Moyhu Hotel, and only the Milawa Hotel in the Lower King Valley. This can limit the length of stay for visitors or impact their satisfaction.

However, cooking classes are offered at Pizzini and Politini Wines. Both wineries offer an intimate experience for visitors, with hands-on cooking classes delivered by family owner-operators.

Politini offers Cannoli Making and Salami & Salsicce Making classes. Pizzini's 'A tavola! Cooking School offers a range of seasonal classes, including pasta and gnocchi, pastry and more.



Pizzini cooking classes

WATER

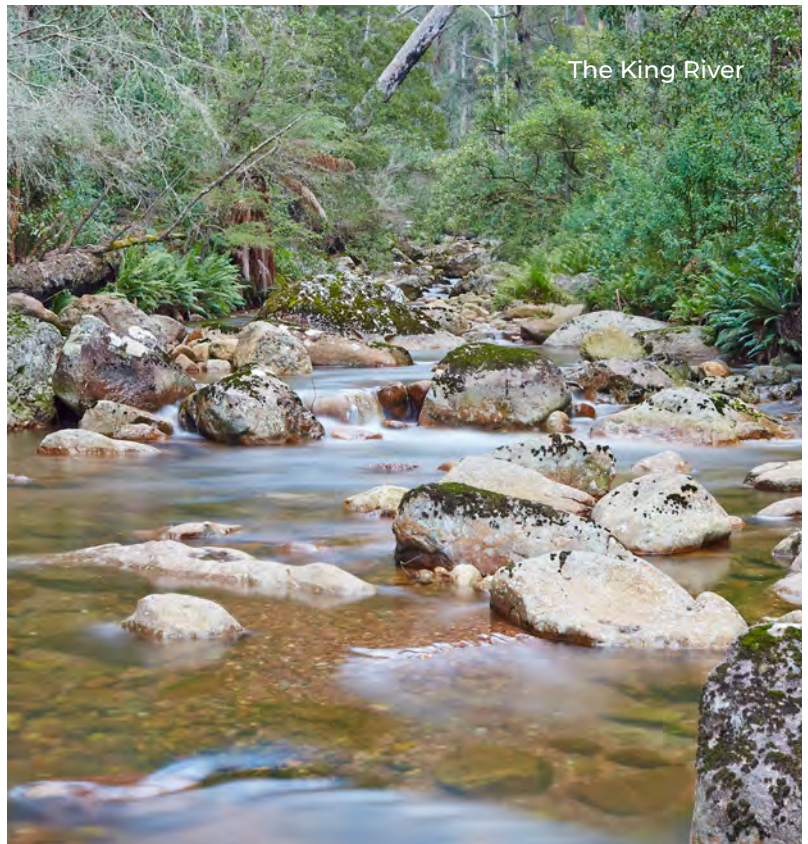
Water is a key driver of visitation to the King Valley as well as the broader High Country.

The King River is the life source of the Valley. The River is integral to the spiritual and cultural wellbeing of Traditional Owners of the land, provides water for irrigation, and is the fabric tying the Upper and Lower King Valley together.

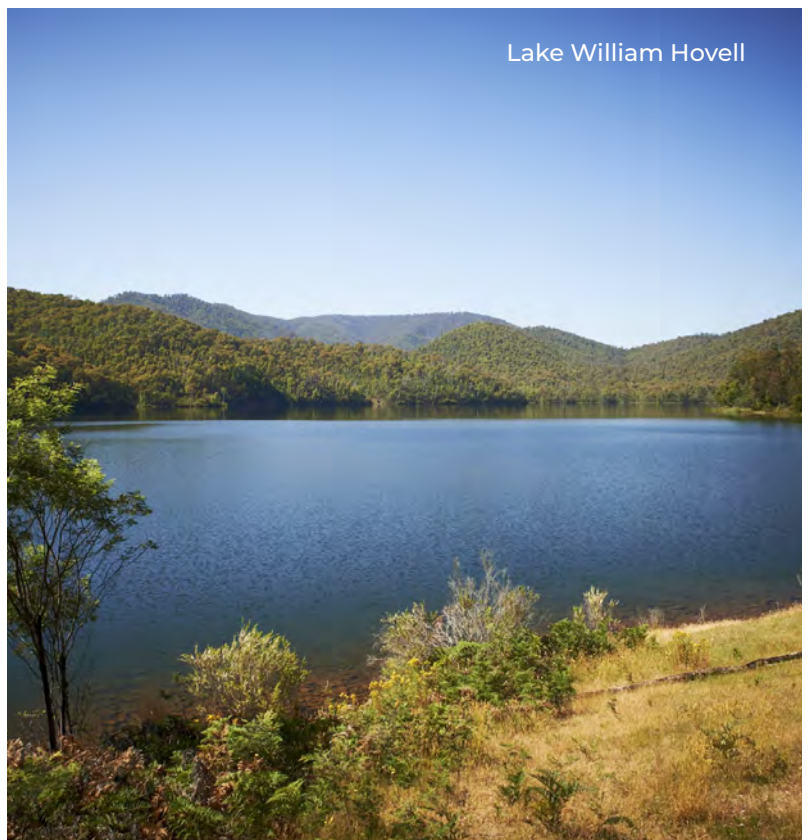
Pristine alpine rivers and lakes provide unparalleled recreation opportunities, including swimming, unpowered boating, fishing and a backdrop for picnics and relaxation.

Located 18km from Cheshunt is Lake William Hovell, a Goulburn Murray Water storage. It is a scenic lake surrounded by State Park and National Park forest, providing a tranquil setting for swimming, canoeing, kayaking and fishing.

Boats are limited to 8kph and 10 horsepower, camping within the confines of the reserves is prohibited and most of the western shore is landscaped, safe and accessible. The lake contains Trout, Redfin and Macquarie Perch, making it a popular fishing location.



The King River



Lake William Hovell



Powers Lookout

NATURE

South of Whitfield is a nature-based precinct including Alpine National Park, Paradise Falls, Powers Lookout, King River and Lake William Hovell.

Alpine National Park offers a range of nature-based experiences for visitors, including walking and hiking, 4WD, picnic areas and camping areas.

The park can be accessed via Cheshunt, either through Rose River Rd or Upper King River Rd. Access to Paradise Falls and Bennies Campground is 2WD, however all other sites and camping areas require a 4WD for access.

Paradise Falls, located in Alpine National Park, is a picturesque and easy Grade 1, 30 minute return walk. A steep descent of paved steps provides access to the Falls.

Powers Lookout is a key vantage point to take in the beauty of the King Valley. The lookout was the hideout of Harry Power, a notorious but 'gentlemanly' bushranger of the 1860s.

Located in Whitlands, the lookout is 3km along a gravel road just off Mansfield-Whitfield Rd. There is a parking area with picnic tables and toilet. The first look out point is wheelchair accessible, and the second lookout point is a Grade 2, 20 minute return walk.

There is opportunity to formalise walks such as the McMullins Track in Cheshunt, currently a closed access 4WD trail beginning from behind Chrismont winery, to provide an additional visitor experience.

CYCLING

Cycling in the King Valley is growing, aligned to the growth in cycle tourism experienced across the High Country.

The key cycling experience is the Murray to Mountains Rail Trail, which traverses Snow Rd from Wangaratta, turning north along Milawa-Bobinawarrah Rd to finish at the Milawa Cheese Factory complex.

Gravel cycling is increasing in popularity in the King Valley. The inaugural 'GRAValley' Event occurred in May 2021, with two days of gravel cycling, live music, food vendors and market stalls.

Road cycling occurs on Wangaratta-Whitfield Rd however is considered unsafe by some cyclists due to a lack of shoulders or shoulder sealing.

There is an opportunity to enhance cycling with a trail connecting Oxley to Cheshunt. This trail has been discussed for decades, with potential to follow the historic rail alignment. Delivery of this trail would provide an important safety improvement for visitors and residents, provide connectivity for visitors and provide a key link between wineries, accommodation, restaurants and other experiences.



Gravel cycling in the King Valley amongst vineyards

EMERGING PRODUCT ASSESSMENT

BEER AND SPIRITS

Recent investments include the Hobbledehoy Cafe and Gin Distillery in Whitfield, Hurdle Creek Still Gin Distillery and King River Brewery. These establishments have relatively limited opening hours.

Beyond this, there are limited beer and spirits experiences, highlighting the opportunity for development of beer and spirits in the King Valley to support the current winery offering.

There is particular opportunity to develop beer and spirits originating from Northern Italy, to leverage and strengthen the Italian associations with the region. Some examples include Aperol, Grappa, Campari, Amaretto and Limoncello.

Aperol provides a particular opportunity, given the popularity of Aperol Spritz which uses Prosecco. This could become a major drawcard for the region.

EVENTS AND MARKETS

Events, markets and weddings are a major opportunity for the King Valley.

Two major food and wine events are currently held across the region, La Dolce Vita in November and Weekend Fit For a King in June. These events attract large volumes of visitors and at these times, the region is at capacity.

Development of a year-round events calendar, particularly events that showcase local produce and provide a unique experience, will be crucial to improving brand awareness and growing visitation.

Delivery of an ongoing King Valley Market will provide a platform to showcase and sell local produce, build brand awareness and provide an additional activity for visitors to undertake.

Weddings, social and corporate events also provide a major opportunity for the region. These event types are currently held at Brown Brothers, pictured below, and are supported by accommodation at Lindenwarrah. This accommodation, however, is insufficient to support the scale of events, and it is cited by industry that visitors often have to stay in Wangaratta during these events.



La Dolce Vita



Events at Brown Brothers Winery



PRODUCT GAPS

PARKS AND GARDENS

The region lacks parks and gardens to support visitation and encourage length of stay from visitors.

Existing parks in Whitfield, Oxley and Moyhu have low amenity for visitors and outdated infrastructure including toilets, signs, picnic benches and playgrounds.

Milawa lacks a formal park, which could be developed at the vacant site at the intersection of Snow Road and Milawa-Bobinawarrah. Cheshunt also lacks a formal park, which could develop at the existing Public Hall site across from The Oven At Cheshunt.

Enhancement and formalisation of existing parkland and river frontages should be prioritised to enhance the visitor experience.

INDIGENOUS HERITAGE

The Traditional Owners of the land on which the King Valley region sits continue to have a close connection with country.

There are sites of significance across the Valley, particularly with connection to the King River. A massacre of at least 200 Aboriginal victims occurred in Oxley Plains in 1841-2, which has potential to be recognised through a reconciliation process.

Recognition of Traditional Owners should be strengthened in the King Valley, potentially through interpretation, reconciliation and exploration of cultural tourism opportunities. This should be co-designed with Traditional Owners.

There is also an opportunity for native bushfood plantings, with Taungurung having recently planted mountain pepper in the King Valley.

ARTS AND CULTURE

Lacking across the entire valley is an arts and culture scene. This includes public street art, sculptures or sculptural trails, museums or galleries, visiting artists or live music events.

Delivery of arts and culture experiences would assist to target the Lifestyle Leader Market, particularly the Creative Opinion Leader market segment.

There is a range of opportunities for arts and culture investment that will activate the region and support local artists. This could include a visiting artists program, public art in key towns, and a sculptural art trail across the Valley.

There is strong support for a sculptural art trail along the long-discussed Oxley-Cheshunt bike path. 74% of respondents to the King Valley Infrastructure Project survey either strongly or somewhat agreed with this opportunity. This could be co-designed with Traditional Owners to deliver an Indigenous art and sculpture trail. The Nungwai Artwork in Goondiwindi, Queensland, provides an example of the type of sculptural pieces that could be achieved. This is shown below.



Nungwai Artwork, Goondiwindi, QLD
Source: Goondiwindi Regional Council

TOURS

The region has a few emerging winery bus tour operators, supporting small group tours. There is opportunity for further development of boutique private tours.

The region should ensure the scale of tours offered remains small, so as to retain an authentic and intimate experience that is not over-commercialised.

ACCOMMODATION ASSESSMENT

SUPPLY

The King Valley has a small accommodation profile of 186 rooms, dominated by self-contained rental properties, caravan parks and free camping. Rental properties account for 64% of establishments in the region and 44% of beds.

There is a clear lack of supply of high quality commercial accommodation in the King Valley. With only three hotel establishments in the region, when contrasted with the commercial accommodation stock of other wine regions in Australia, the King Valley still has a relatively immature tourism accommodation market.

The assessment also indicated that there is likely to be a suitable level of existing camping sites across the region.

Rooms by accommodation type

	No.	%
Rented house/apartment/unit	81	44%
Free Camping	0	0%
Caravan /commercial camping ground	18	10%
Cottage/bed and breakfast	11	6%
Standard hotel/motel (below 4 star)	15	8%
Luxury hotel/resort (4 or 5 star)	40	22%
Other	21	11%
Total	186	100%

Proportion of beds



Currently, the accommodation market in the King Valley is supply led. A significant share of visitors stay in the Upper King Valley due to the availability of accommodation (74% of accommodation stock), while a large proportion of overnight visitors stay in either caravan parks/commercial camping grounds or free camping sites due to the considerable supply of these accommodation typologies.

Proximity to major regional centres (Wangaratta) and visitor destinations (Bright and Beechworth), constrains the potential of Milawa and Oxley to become overnight visitor destination.

DEMAND AND OPPORTUNITIES

The future demand assessment indicates a need for an additional 243 rooms over the next 10 years in the King Valley.

Key opportunities for investment in the King Valley have been identified below. These are identified as a result of gaps in supply, demand from existing visitors identified through the past visitor survey, and preferences of potential new visitors identified through the market research.

- Boutique Hotel
- Holiday Park
- Wellness Resort
- Large Scale Standard Self-Contained
- Luxury Self-Contained
- Midscale Hotel

A boutique luxury hotel has been identified as the most important short-term accommodation investment project in the King Valley. Key project drivers identified include:

- Establishing the region as a genuine wine destination
- Critical gap in high quality commercial accommodation throughout the region (3.5 stars+)
- Low proportion of visitors staying in commercial accommodation
- Projected need for additional visitor accommodation (+243 rooms by 2031)
- Region does not attract high yield visitors, partly due to lack of high quality accommodation
- Extending length of stay and spend for existing visitors by delivering new product

KEY FINDINGS

- The quality of cellar door experiences varies greatly across the region.
- Food experiences are limited and do not match the quality of wine offering.
- There are limited opportunities and understanding of where to buy and taste local produce.
- There is a lack of night-time activation and dinner options for visitors, impacting on satisfaction, repeat visitation and overnight visitation.
- Proximity to major regional centres (Wangaratta) and visitor destinations (Bright and Beechworth), constrains the potential of Milawa and Oxley to become overnight visitor destinations.
- Currently, the accommodation market in the King Valley is supply led. Visitors stay in rental properties or caravan/camping accommodation as there is little other accommodation stock.
- Lack of commercial accommodation supply to grow overnight visitation, increase visitor yield and meet visitor needs and expectation. Key gaps include luxury and standard midscale hotels, as well as luxury self-contained accommodation.
- The historic lack of midweek visitation and seasonality of visitation has impacted the ability to attract commercial accommodation operators.
- The region's heritage, both Italian and Indigenous, could be further showcased through products and experiences.

RECOMMENDATIONS

- **Investment in cellar door experiences to ensure visitors receive a premium cellar door experiences across the King Valley.**
- **Complement the wine offering through an enhanced food experience, including investment in new food and dining experiences, farmgate experiences, providores and markets to showcase local produce.**
- **Cement the visitor experience of Italian heritage through the food, wine and ferments offering, including development of Italian liquers, spirits, beer and food.**
- **Develop a night time economy to activate the region, through bars, restaurants and delivery of overnight accommodation to support overnight stays.**
- **Invest in high quality visitor accommodation to grow overnight stays, visitor yield and to support development of a night-time economy.**
- **Improve connectivity, access and visitor experience through new and enhanced walking and cycling trails.**
- **Activate the region and enhance the visitor experience through arts and culture experiences, improved parks, gardens and river front access and amenity.**
- **Undertake business development activities to enhance individual business offerings and ensure the highest level of service.**

BRAND AND MARKETING ASSESSMENT



CURRENT MARKETING AND BRANDING GOVERNANCE

The current approach to branding and marketing is complex, due to a range of stakeholders operating in the marketing sphere with different branding and messaging.

There is a lack of unified brand and positioning at all levels. Examples include the positioning of King Valley Prosecco Road, Milawa Gourmet Region vs. King Valley, and the positioning of the King Valley by Visit Victoria and Tourism North East compared to local positioning.

The King Valley requires a clear brand and vision, and unification of key stakeholder groups to present a clear and consistent brand.

Organisation	Brand	Role and Remit	Communication Message Overview
Visit Victoria State Government Agency		Primary tourism and events company for the State Government, involved in research, advocacy and domestic and international marketing.	King Valley features as one of Victoria's five premier wine regions. Features "Prosecco Road" as a 'food and wine trail' Offers itineraries such as "Milawa Gourmet Ride".
Tourism North East Regional Tourism Board		Collaborate with government and industry partners to undertake planning, marketing, product development, industry development, infrastructure and advocacy.	"King Valley and Milawa" associated together on the 'Victoria's High Country' website.
Rural City of Wangaratta Local Government Authority		Responsible for services and infrastructure, community assets, building, planning, general services and business development. Produce and manage the official 'Visit King Valley' website.	Recognise the "King Valley" through the destination website, with themes such as "The King of Adventure" and "A culinary adventure".
Wines of the King Valley Local Tourism Association [Wine Producers]		A producer group operated and managed to promote the region's wines, wine production, and winemaking families.	Promotes the King Valley through messages such as "the Italian Spirit", "Meet the winemaker: "Prosecco Road Experiences" and "Stories" about local winemakers.
King Valley Tourism Association Local Tourism Association [Upper King Valley]		Local Tourism Association for the Upper King Valley (Moyhu to Cheshunt). This association is in the process of re-establishing themselves after forming a new committee.	No collateral currently produced.
Milawa Gourmet Region Association Local Tourism Association [Lower King Valley]		Local Tourism Association for the Lower King Valley (Oxley, Milawa). Includes townships that are outside of the King Valley (Tarrawingee, Everton) which are included in the Beechworth Wine region. Promotes both product and place.	Australia's first gourmet region. 'Milawa Gourmet' is a product brand, however the 'Milawa Gourmet Region' is promoted as a destination brand Collateral includes website, brochures, touring map, and in-region business and township signage.

CURRENT MARKETING ACTIVITIES

Existing marketing activities are disjointed and lack clarity in the eyes of the consumer. The consumer needs to understand and feel comfortable with the King Valley and its offering before booking a trip.

An overview of key websites for the King Valley are shown on this page. The quality and clarity of the content across the sites varies.

Prosecco Road Cellar Doors



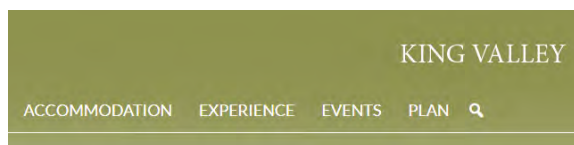
Explore the two styles of Brown Brothers' a complementary tasting in the heart of the sun is shining, take advantage and prosecco with a cheese and charcuterie on a picnic rug in the beautiful gardens bit of extra time up your sleeves, why not the vineyards...by helicopter!



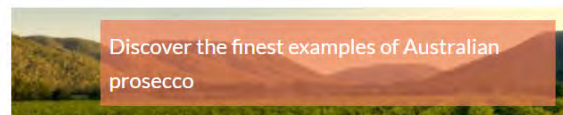
he beautiful Sam Miranda winery from a
www.victoriashighcountry.com.au

Victoria's High Country [Website & Instagram]

Official regional consumer website produced and managed by Tourism North East. Mentions 'The King Valley and Milawa'.



King Valley Prosecco Road



www.visitkingvalley.com.au

Visit King Valley [Website]

Official King Valley destination website, run by the Rural City of Wangaratta (RCoW). This site is outdated, static and lacks engaging content and branding, which should be reviewed and updated to ensure the website has maximum effectiveness.



www.winesofthekingvalley.com.au

Wines of the King Valley [Website & Instagram]

Official wine producer website, managed by Wines of the King Valley. The website conveys stories of local wineries and highlights key activities as part of the Prosecco Road experience. This site links to the Official King Valley website.



www.milawagourmet.com.au

Milawa Gourmet Region [Website & Instagram]

Produce and destination website run by Milawa Gourmet Region Association, with an online local produce store for Milawa Gourmet products, as well as acting as a destination website with activities, accommodation, and events.

PROSECCO ROAD

PROSECCO ROAD ORIGINS

This project emerged from the renowned King Valley Prosecco Road wine marketing initiative.

The concept emerged as a result of the region's five iconic wineries, Brown Brothers, Chrismont, Dal Zotto, Pizzini, and Sam Miranda, working together to reimagine the King Valley. King Valley Prosecco Road was used as a marketing and promotional tool to drive interest in the region.

The origin of the concept is the "Strade Del Prosecco e Vini Dei Colli – Conegliano Valdobbiadene". The concept originated in 1966 as a way of providing a joint product offer linking the two famous wine regions of Conegliano and Valdobbiadene in the Veneto Region.

Similarly, King Valley Prosecco Road was established to link the upper King Valley wineries (Chrismont, Dal Zotto and Pizzini) with the lower King Valley wineries (Sam Miranda and Brown Brothers).

Strade del Prosecco is not a road as such but an association that markets the region and itinerary as shown below.

PROSECCO ROAD APPROACH

Much can be learned by the long-established Italian Association which promotes tourism in the Valdobbiadene and Conegliano regions.

It is not necessary for the Prosecco Road concept to be tied to a place or actual 'road'. It should continue to be used as a marketing tool to promote the region and touring itineraries a 'pilgrimage to prosecco' and reflect the northern Italian heritage of the region. King Valley Prosecco Road should continue to be used in the following way:

- Unite the region, through the establishment of one local tourism association for the entire King Valley.
- Establishment of touring itineraries to explore the King Valley, including by bike or vehicle with various touring options, route and product focus.
- Used in branding and promotion to inspire and leverage from the popularity of Prosecco.

It is important not to confuse 'place' with product. The King Valley is the place, Prosecco Road is a product.



Source: Strade Del Prosecco e Vini Dei Colli – Conegliano Valdobbiadene

KING VALLEY BRAND AWARENESS

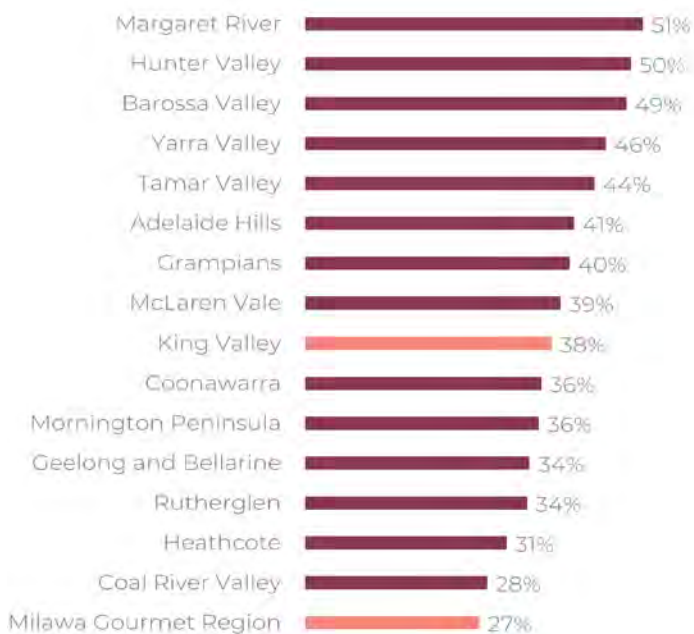
A visitors perception of a destination or region can often vary greatly from the perception of industry and stakeholders.

Market awareness research has been undertaken by Urban Enterprise to assess and verify the perception of the region by visitors. Prompted and unprompted awareness statements about the King Valley were tested with a statistically valid sample of 2,000 Australians.

This brand awareness research confirms the following:

- **38% of the Australian market have heard the name King Valley and are interested in visiting.**
- **King Valley ranks third out of the Victorian wine regions and Milawa Gourmet Region ranks last out of all food/wine destinations tested for awareness and interest in visiting.**
- **A high proportion of the market remains unaware of the King Valley (41%), which can be enhanced with marketing and events.**

Awareness and Interest in Visiting Compared to other Food/Wine Destinations



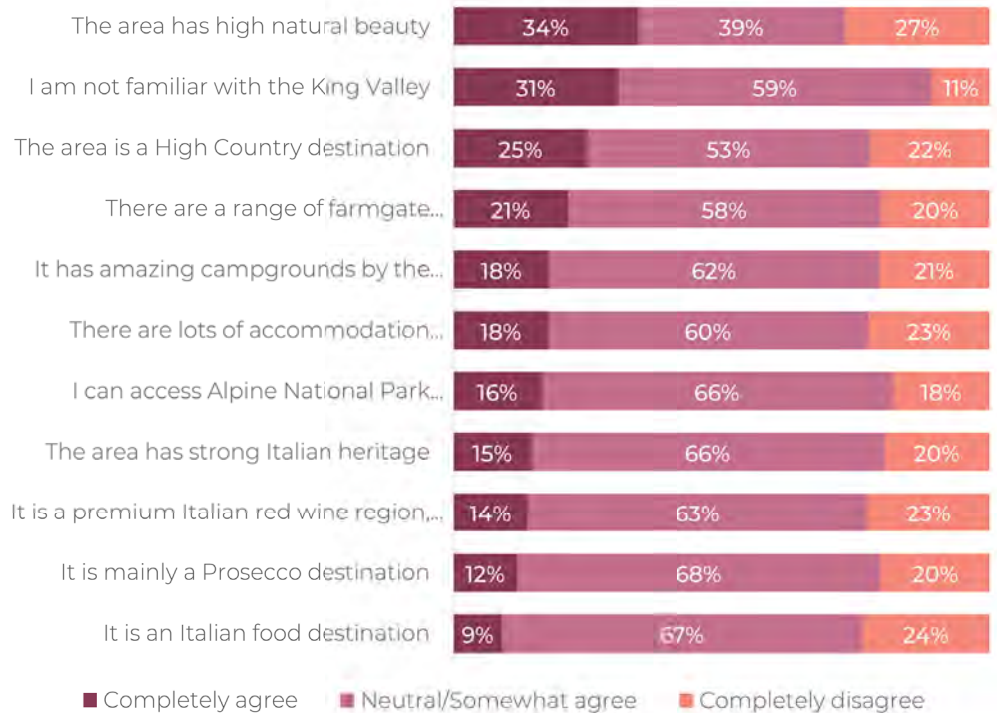
Source: Urban Enterprise, rmarket research results from over 800 Australian residents who had previously heard of the King Valley, 2021.



ASSOCIATIONS WITH THE KING VALLEY

The following key findings demonstrate the associations the visitor market has with the King Valley. This includes Australian residents who have visited the King Valley or have heard of King Valley and have interest in visiting.

- Awareness of natural beauty is high
- High proportion of market that is not familiar with the King Valley offering even though they are interested in visiting
- Farmgate produce awareness is high
- Awareness of the Italian heritage, Italian wine, food and Prosecco is relatively low



Source: Urban Enterprise, rmarket research results from over 800 Australian residents who had previously heard of the King Valley, 2021.

What is unique about the King Valley?



"It feels more relaxed in King Valley than other wine regions – very welcoming. It just felt so much more casual, but in a positive way"



"The fact it's not over-commercialised is a big draw card"



"You can go from a hike to a winery in the same outfit"



"Prosecco is a big draw for me – I like to visit a region that is doing really well in a particular variety"

Quotes taken from past visitors who responded to intercept surveys and participated in focus groups.

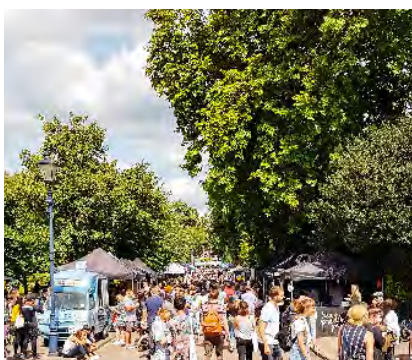


PRINCIPLES FOR DEVELOPMENT

Development principles have been prepared by Urban Enterprise, with supporting imagery from TCL.

These principles will ensure development in the King Valley leverages the region's comparative advantages and maintains the character that makes it unique.

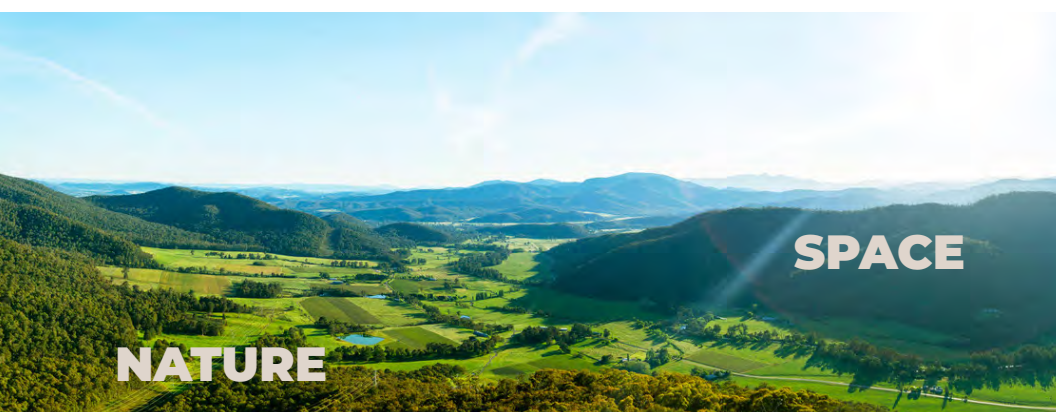
- Maintains, enhances and celebrates the natural environment and mountain views
- Aligns to Italian heritage and principles of hospitality, generosity, slow pace, relaxation and warmth
- Creates casual luxury, accessible to and comfortable for all visitor markets
- Rustic and country feel, with luxury created through space, light and connection with nature
- Materials and colours are sympathetic to the natural environment
- Promotes a connection to the land and its Traditional Owners, its agricultural properties and links to the King River as the source of the Valley





CASUAL LUXURY

GENEROSITY



NATURE

SPACE



ROMANCE

PROSECCO ROAD MESSAGING

Based on the existing brand as well as opportunities to enhance the King Valley through the Prosecco Road brand, it is recommended that the following themes are expressed through the Prosecco Road brand: *family, generosity, nature, romance, Prosecco, authenticity, connection to the producer, and casual luxury.*

This should be showcased through imagery, marketing, and product development.



FAMILY

**ITALIAN
HERITAGE**



CONNECTION TO PRODUCER



AUTHENTICITY

PROSECCO ROAD POTENTIAL MARKETING APPLICATIONS

Based on Prosecco Road as a touring experience, it is recommended that a range of journeys or itineraries are created to showcase the region.

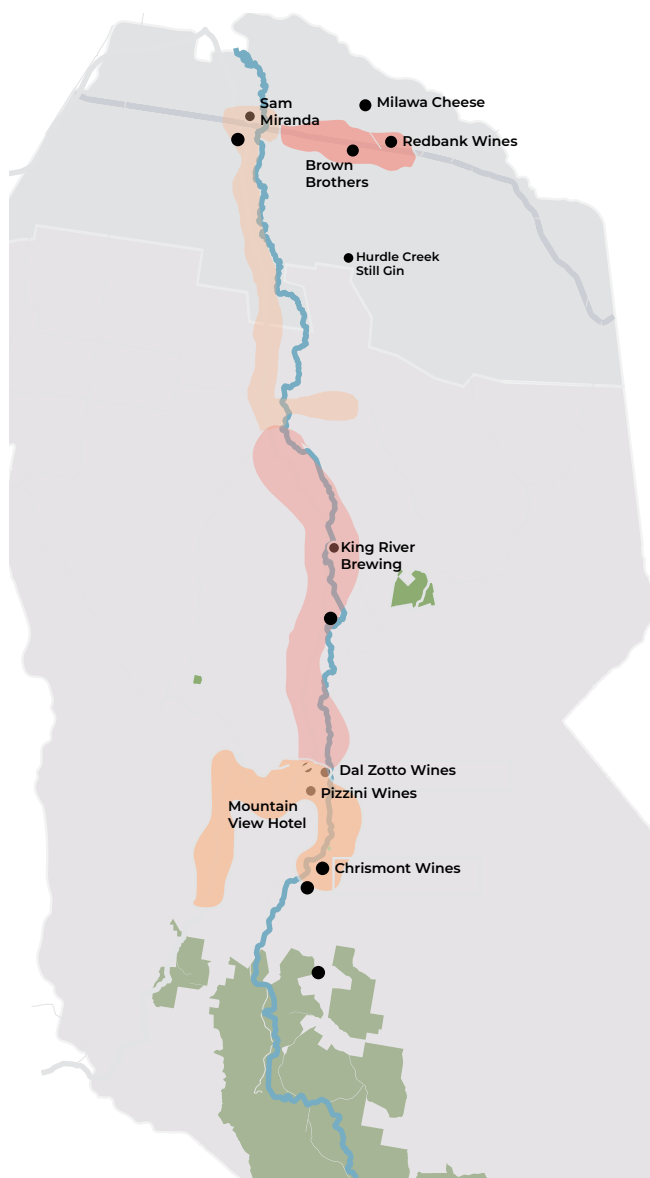
These tours can apply across a range of product categories, such as cycling, wine touring, farmgate produce, and nature.

A sample itinerary has been included below. *Note: This is an example only.*

Sample Itinerary

Ride the Prosecco Road

Ride the scenic Prosecco Trail, taking a journey through the King Valley, from Brown Brothers to Chrismont, from the vast plains of Milawa to the rolling hills of Cheshunt.



DAY 1

MILAWA TO OXLEY

Begin your day in Milawa with a coffee and a selection of artisanal pastries from the Milawa Kitchen. Grab a tasting plate from Milawa Cheese, and be sure to take some back for later.

Cycle down to Redbank Wines for a tasting of their wines and a snack from Milawa Providore. Moving to Brown Brothers, sit back for a long lunch of premium local produce.

Check into your suite at Lindenwarrah and enjoy dinner at Restaurant Merlot.

DAY 2

OXLEY TO MOYHU

Start the day with a coffee at King River Cafe in Oxley, before stopping at Sam Miranda for a glass of Prosecco and a generous tasting platter.

Pedal down the Prosecco Trail along pastures and wide open paddocks. Quench your thirst with a tasting at Hurdle Creek Still Gin.

Cycle down to Edi Cutting, taking a dip in the crystal clear King River. Cruise back to Moyhu to check into the Kingsley, your private farm for the night. Grab a pint and parma at the Moyhu Hotel.

DAY 3

MOYHU TO WHITFIELD

Pedal down to Red Feet, where you can kick up your feet on the elevated ridgeline, a glass of Sangiovese in hand. Follow with a tasting paddle from King River Brewing, enjoyed in their lush outdoor garden.

Lunch is fresh, handmade pizza and pasta at Dal Zotto, accompanied by a game of bocce with a bottle of bubbles. Slowly pedal to Pizzini for a cooking class with Katrina Pizzini.

A buzzing Italian courtyard awaits you at Mountain View Hotel for dinner and an Aperol Spritz. Walk across to the three Black Sheds for a luxurious sleep.

DAY 4

WHITFIELD TO CHESHUNT

Cycle up to Powers Lookout and take in the breathtaking view. Make sure to bring a picnic full of goodies you've picked along the way.

Pedal through the narrowing valley to reach Chrismont, enjoying the view with a glass of La Zona Fiano in hand, an ode to Sicily. Head back inside for lunch from an eloquent menu that blends the seasons with inspirations from time-honoured family recipes.

Pack the bikes away and drive away through the vines in Whitlands, saying ciao, 'til next time.

KEY FINDINGS

- King Valley is the ‘place’ and overarching regional brand that is well-recognised by visitors. This should be the lead brand for the region.
- Prosecco Road is a marketing concept that does not need to be reflected in a physical way – it is a product, to support the growth and development of the region’s marketing. Prosecco Road should be used in marketing and promotion, tours and itineraries, and online.
- Prosecco Road should be used as a subtext to the King Valley brand and should be combined with adjectives like “drive the Prosecco Road”, in order to reduce confusion for visitors and delineate the concepts of King Valley and Prosecco Road.
- The Milawa Gourmet Region should focus effort on solidifying the already recognised food product-brand (Milawa Gourmet) rather than trying to create a destination brand. In collaboration with Council and Tourism North East, a plan should be developed to unify the existing LTA’s to ensure they work towards a common goal.
- The experience of the King Valley is interlinked with other destinations within the High Country. This is reinforced by the King Valley being most associated with the High Country and high natural beauty.
- Past visitors associate the King Valley with Northern Italy however the potential visitor market has low awareness of this association. It will be important for the region to strengthen this link as a destination needs to differentiate itself and be known for something in order to be successful. The use of Prosecco Road is an excellent tool for creating this cultural link to Northern Italy.

RECOMMENDATIONS

- **Lead with the King Valley brand, which has the greatest consumer recognition and potential for growth in awareness.**
- **Unify the Upper and Lower King Valley through consistent use of the King Valley brand, withdrawal of the Milawa Gourmet Region brand, and consolidation of destination websites.**
- **Undertake a collaborative branding and marketing strategy to clarify destination brand and create a cohesive brand that is easily recognised and understood by visitors.**
- **The Italian heritage of the region and history of Italian family winemakers is a key point of difference and added layer of depth to the King Valley experience. Strengthen this association through product development, marketing, events and arts and culture initiatives.**
- **Prosecco Road should continue to be used as a marketing initiative and a vehicle through which to unite the King Valley through itineraries, tours and experiences.**
- **Explore the potential promotion of Prosecco Road as a “Pilgrimage to Prosecco”.**
- **Continue to express the following themes through the Prosecco Road brand: *Family, generosity, nature, romance, Prosecco, authenticity, connection to the producer, and casual luxury.***

THE PLAN

A clear vision and guiding framework will ensure the region has the tools to flourish.

The Plan for the King Valley is presented in this section, which has been developed as a result of the research and analysis throughout the Plan.

The Plan includes a vision, objectives, themes and an overarching regional investment plan to guide future tourism development.





STRATEGIC FRAMEWORK

THE VISION

The King Valley will be the most desired and recognised wine region in Australia, harnessing the generous and warm Italian family spirit to provide an experience of casual luxury and intimate hospitality.

TOURISM DEVELOPMENT OBJECTIVES

Objectives for tourism development in the King Valley have been defined below. These capture the sentiment shared by local business and industry, key stakeholders, needs of existing and potential King Valley visitors.

- Enhance the visitor experience through improved visitor infrastructure, services, amenity and facilities
- Grow overnight visitation through investment in high quality, motivating accommodation
- Encourage night-time activation to improve visitor satisfaction and increase length of stay
- Create additional visitor activities that provide depth to the experience
- Reinforce and strengthen key towns of Milawa and Whitfield as visitor hubs for the region
- Increase King Valley brand awareness and motivation to visit
- Create a seamless visitor experience and increase connection between the Upper and Lower King Valley
- Showcase and celebrate Italian heritage and Indigenous cultural heritage
- Deliver dining and local produce experiences that complement the wine offering



ACTIVATING KING VALLEY PROSECCO ROAD PROJECT THEMES

Over 50 projects have been identified. These have been broadly categorised across the following themes:

Key Themes	Description
Theme 1 Township Revitalisation	Investment in streetscaping, visitor amenity and interventions that will activate and revitalise the region, creating a contemporary and attractive destination that inspires visitors to stay longer and return to the King Valley.
Theme 2 Accommodation	Development of a variety of accommodation typologies, driven by market preferences, will transform the King Valley and ensure the region is an attractive and high-yielding overnight visitor destination.
Theme 3 Trails and Nature-based	An improved trail network for increased safety, connectivity and business access, as well as enhanced nature-based offerings to provide a well-rounded visitor experience.
Theme 4 Food, Dining and Hospitality	Delivery of high quality and contemporary dining, including farmgate experiences, restaurants, and bars, coupled with the highest level of customer service, will ensure visitor preferences are met.
Theme 5 Infrastructure and Planning	Investment in enabling infrastructure and streamlining the planning process will facilitate private sector development.
Theme 6 Governance and Marketing	A cohesive tourism governance approach for an overarching King Valley brand will solidify the destination brand, improve brand recognition and grow visitation.
Theme 7 Business Development and Enhancement	Providing support to local businesses to improve their offering and service levels to meet visitor preferences and deliver a premium experience across the King Valley.

PROJECT PRIORITISATION

Projects have been prioritised using a range of assessment criteria, to ensure projects that will deliver the greatest economic and tourism benefit are prioritised.

The following criteria have been used to assess projects.

- Grows overnight visitation
- Strengthens King Valley Brand and creates brand awareness
- Grows mid-week visitation
- Grows visitor yield and extends length of stay
- Enhances visitor experience and satisfaction
- Improves connectivity and access
- Enables commercial investment and private sector activation
- Expands product offering and provides additional activities for visitors
- Reinforces regional approach to visitor experience

Projects have been categorised based on how well they align to assessment criteria and what impact they will have on the regional visitor economy. This includes

- **Tier 1 Business Case Projects**
- **Tier 2 Projects**
- **Tier 3 Projects**

Tier 1 business case projects are the highest priority projects for the region and will have a transformative effect on the region. These projects fill a critical gap in the regional offering and will transform the visitor experience.

A Tier 2 project is high priority, will have a significant economic benefit for the region and requires substantial investment to be realised.

A Tier 3 project is a lower priority for the region and will have a sizeable economic benefit for the region, however may require further planning time.

THEME 1

Destination Enhancement and Township Revitalisation

PROJECTS BY THEME

The following section details the seven strategic themes that have emerged through preparation of the Activating King Valley Prosecco Road Project.

A summary of projects has been provided for each theme.

Investment in streetscaping, visitor amenity and interventions that will activate and revitalise the region, creating a contemporary and attractive destination that inspires visitors to stay longer and return to the King Valley.

Public sector investment is required in high quality streetscaping and amenity across the region, in townships and along the visitor journey.

This will create greater activation and vibrancy in King Valley township and encourage investment in vacant and underutilised sites.

Architectural design should amplify the King Valley landscape and provide a visual experience of the King Valley brand attributes.

OVERVIEW OF THEME 1 PROJECTS

Tier 1 Business Case Project

Destination enhancement and township revitalisation

Gateway sculptural interventions at Oxley and Whitfield

Township revitalisation at Milawa, Oxley, Moyhu, Whitfield and Cheshunt

Tier 2 Projects

Secondary gateway interventions

Wayfinding signage strategy and implementation

Removal of Milawa Gourmet Region signage

Tier 3 Projects

Rename Wangaratta-Whitfield Road

King Valley public art program

Prosecco Trail interpretation

Indigenous reconciliation in Oxley

Strengthening of Powers Lookout

Strengthening of Whitlands Lookout Reserve

Visiting artist program

THEME 2

Accommodation

Development of a variety of accommodation typologies, driven by market preferences, will transform the King Valley and ensure the region is an attractive and high-yielding overnight visitor destination.

There is latent demand for a range of visitor accommodation typologies, from both existing and new visitor markets.

Primary accommodation research undertaken for the King Valley demonstrates the need for investment in a range of accommodation typologies to meet market need and provide for overnight visitor growth.

Investment in accommodation will greatly increase visitor expenditure and yield in the region.

OVERVIEW OF THEME 2 PROJECTS

Tier 1 Business Case Project

Boutique luxury hotel

Tier 2 Projects

Holiday park

Large scale standard self-contained

Tier 3 Projects

Wellness resort

Luxury self-contained

Midscale hotel

Continue investment in Gentle Annie Caravan Park

Amenity improvements to Edi Cutting Reserve

THEME 3

Trails and Nature-based

An improved trail network for increased safety, connectivity and business access, as well as enhanced nature-based offerings to provide a well-rounded visitor experience.

The King Valley has high quality natural assets which have long lacked activation due to a lack of public sector investment.

Activation of natural assets will be achieved through trail links, swimming holes and facilitation of access through equipment hire. This will ensure the King Valley provides a breadth of exciting visitor activities and competes with other premium wine destinations such as McLaren Vale and Margaret River, which have leveraged visitation growth through investment in activating natural assets.

OVERVIEW OF THEME 3 PROJECTS

Tier 1 Business Case Project

Prosecco Trail

Tier 2 Projects

Riverfront precinct activation

Tier 3 Projects

McMullins Track formalisation

Cheshunt equipment hire hub

Tarrowingee – Milawa cycle link

THEME 4

Food, Dining and Hospitality

Delivery of a high quality and contemporary dining, including farmgate experiences, restaurants, and bars, coupled with the highest level of customer service, will ensure visitor preferences are met.

The King Valley provides a premium wine offering, however the food and dining scene is underdeveloped by comparison. A lack of restaurants, bars, cafes and providore stores impacts visitor satisfaction and yield.

To compete in the Victorian market of high quality food and dining experiences, the King Valley needs to innovate and elevate its food offering to provide visitors a premium experience that is akin to the quality received in Melbourne, with a relaxed regional atmosphere.

OVERVIEW OF THEME 4 PROJECTS

Tier 2 Projects

King Valley Farmers Market
Summer Spritz Sessions
Providore

Tier 3 Projects

Prosecco and wine bar
Destination café in Whitfield
Expansion of farmgate experiences
Destination artisan bakery
Peak season pop ups
Picnic in the vines
Locally produced aperitive and grapperiera
Bushfood opportunities

THEME 5

Infrastructure and Planning

Investment in enabling infrastructure and streamlining the planning process will facilitate private sector development.

The quality of roads and telecommunications infrastructure should be improved to ensure connectivity and access across the region. This will generate greater enhanced searching and sharing of content, as well as increasing visitor satisfaction and perception of the King Valley as a premium visitor destination.

Improved road and telecommunications infrastructure will facilitate private sector investment and business expansion.

The Rural City of Wangaratta should continue to ensure there is an adequate supply of zoned land to ensure the tourism industry and community can grow.

OVERVIEW OF THEME 5 PROJECTS

Tier 2 Projects

Wangaratta-Whitfield Road enhancements
Planning for development
Telecommunications improvement

Tier 3 Projects

Investigate transport solution
King River crossing at Gentle Annie Lane
Myrrhee gravel road sealing
Electric vehicle charging stations

THEME 6

Governance and Marketing

A cohesive tourism governance approach for an overarching King Valley brand will solidify the destination brand, improve brand recognition and grow visitation.

The King Valley lacks a cohesive brand, in terms of its digital and physical presence.

The unification of the Upper and Lower King Valley through the overarching King Valley brand will allow the region to grow in a consistent direction.

Delivery of streamlined branding and messaging across digital media platforms and in-region collateral such as signage and visitor information, will ensure the visitor understands and becomes an advocate for the King Valley brand.

OVERVIEW OF THEME 6 PROJECTS

Tier 2 Projects

Branding and marketing strategy

Tourism governance review

THEME 7

Business Development and Enhancement

Providing support to local businesses to improve their offering and service levels to meet visitor preferences and deliver a premium experience across the King Valley.

King Valley operators deliver high quality, warm hospitality and service, which has been expressed strongly by past visitors. What the region lacks is the significant capital required to enhance their business offerings and invest in larger scale commercial offerings, as well as a labour force to support growth.

Grants to assist businesses to improve their offerings, utilising high profile ambassadors promoting the region, and improved training will help to grow the local workforce and attract new investment in the region.

OVERVIEW OF THEME 7 PROJECTS

Tier 2 Projects

Business enhancement program

King Valley ambassador program

Tier 3 Projects

Hospitality advisory program

Improved training

Heritage reuse program

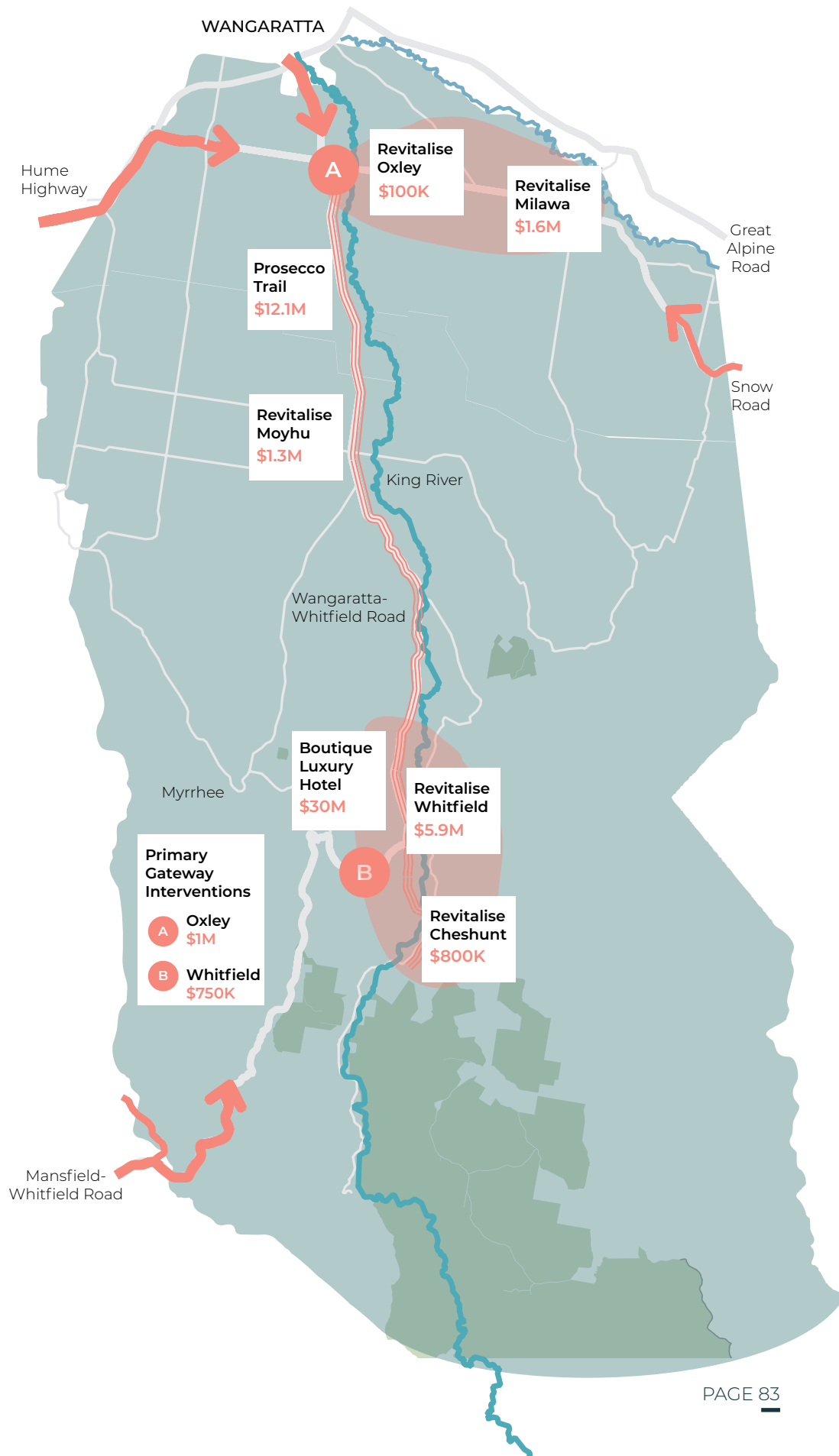
Italian action plan and visiting chefs program

TIER 1 PRIORITY INVESTMENTS

BUSINESS CASE PROJECTS

The following section details the three priority Tier 1 business case projects.

This includes a summary of the strategic investment locations [this map], a detailed profile of each business case, and a summary of the economic impact of investment.



TIER 1 BUSINESS CASE PROJECT

Destination Enhancement and Township Revitalisation

\$11.5 M [public sector]

Gateway Sculptural
Intervention Locations

**Oxley roundabout
and southern entry to
Whitfield**

Cost **\$1.75 million**

Construction Impact

\$21.7 million output and 56 (FTE) jobs

Ongoing impact

\$39.5 million output and 170 (FTE) jobs [annual]

Township Revitalisation
Locations

**Milawa, Oxley,
Moyhu, Whitfield and
Cheshunt**

Cost **\$9.7 million**

This business case has been prepared to guide the enhancement of the King Valley as a visitor destination, through enhancement of the visitor journey and experience. Key interventions required to achieve this goal include:

- Investment in sculptural gateway interventions at primary gateways to the region; Oxley and Whitfield;
- Township experience enhancements at key visitor destinations of Milawa, Oxley, Moyhu, Whitfield and Cheshunt.

Delivery of a range of streetscape, amenity, wayfinding and parkland interventions in the key tourist towns of the King Valley will revitalise the region and create an attractive destination.

Renders have been prepared by TCL to visualise the township revitalisation of hero towns Milawa and Oxley, and a gateway intervention for the Oxley roundabout.

Oxley Gateway \$1M

Deliver a sculptural intervention at the Oxley roundabout, the primary gateway to the King Valley at the northern end of the region. This gateway should respond to and amplify the surrounding landscape of the flat Oxley Plains, and provide an experience that signifies entry into the King Valley. The design concept should be cohesive with the Whitfield gateway and reinforce the King Valley brand attributes.



Visualisation by TCL

Whitfield Gateway \$750K

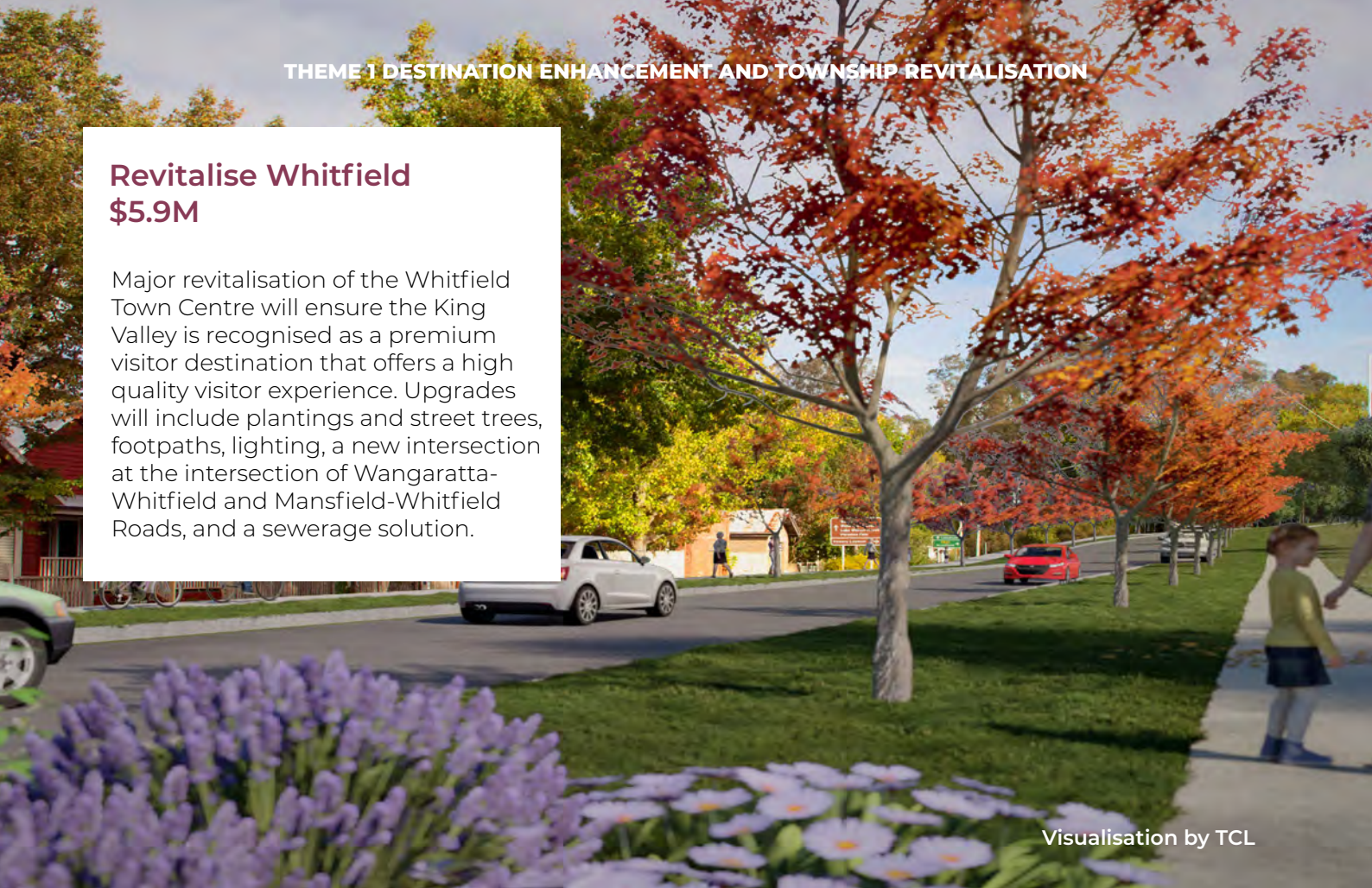
Deliver a sculptural intervention at the southern primary gateways to the King Valley, upon entrance to Whitfield as the valley widens. This gateway should respond to and amplify the surrounding landscape, and provide an experience that signifies entry into the King Valley. The design concept should be cohesive with the Oxley gateway and reinforce the King Valley brand attributes.



Visualisation by TCL

Revitalise Whitfield \$5.9M

Major revitalisation of the Whitfield Town Centre will ensure the King Valley is recognised as a premium visitor destination that offers a high quality visitor experience. Upgrades will include plantings and street trees, footpaths, lighting, a new intersection at the intersection of Wangaratta-Whitfield and Mansfield-Whitfield Roads, and a sewerage solution.



Visualisation by TCL

Revitalise Milawa \$1.6M

Deliver a suite of improvements for Milawa including streetscaping, plantings, lighting, improved carparking and bus parking in town centre, pedestrian crossings at key intersection, park enhancement and delivery of the Snow Road to Brown Brothers trail link.



Visualisation by TCL

Revitalise Oxley \$110K

Enhance the Oxley streetscape through increased boulevard planting, improved access to parks, and improved wayfinding, including better highlighting the Murray to Mountains Rail Trail.

Revitalise Moyhu \$1.3M

Increase the amenity of Moyhu as a visitor destination through median boulevard planting, signage to Moyhu Lions Park and King River, and pedestrian crossing from Moyhu Hotel to Carl Schultz Reserve. Landscaping for Carl Shultz Reserve and Moyhu Beach.

Revitalise Cheshunt \$800K

Enhance Cheshunt through improved pedestrian infrastructure and amenity, including wheelstops footpath access to the King River, bollards and tree plantings to reinforce road barriers, improved boulevard planting, and upgrades to the Cheshunt Public Hall Park.

MOYHU STREETScape VISUALISATION



Proposed Streetscape Intersection 1:200, by TCL

TIER 1 BUSINESS CASE PROJECT

Boutique Luxury Hotel

\$30 M [private sector]



Visualisation by TCL



The most important short-term accommodation investment project in the King Valley, this project will deliver a 40-60 room boutique luxury hotel. Amenities will include a restaurant, bar, swimming pool, art gallery, recreation facilities, a day spa and small events space.

Location: Whitfield or Cheshunt, natural setting with views and close proximity to town, ideally co-located at a winery.

Construction Impact: \$65.9 million output and 168 jobs

Ongoing impact: \$51 million output and 251 jobs [annual]

Visualisation by TCL

TIER 1 BUSINESS CASE PROJECT

Prosecco Trail

\$12.1 M [public sector]

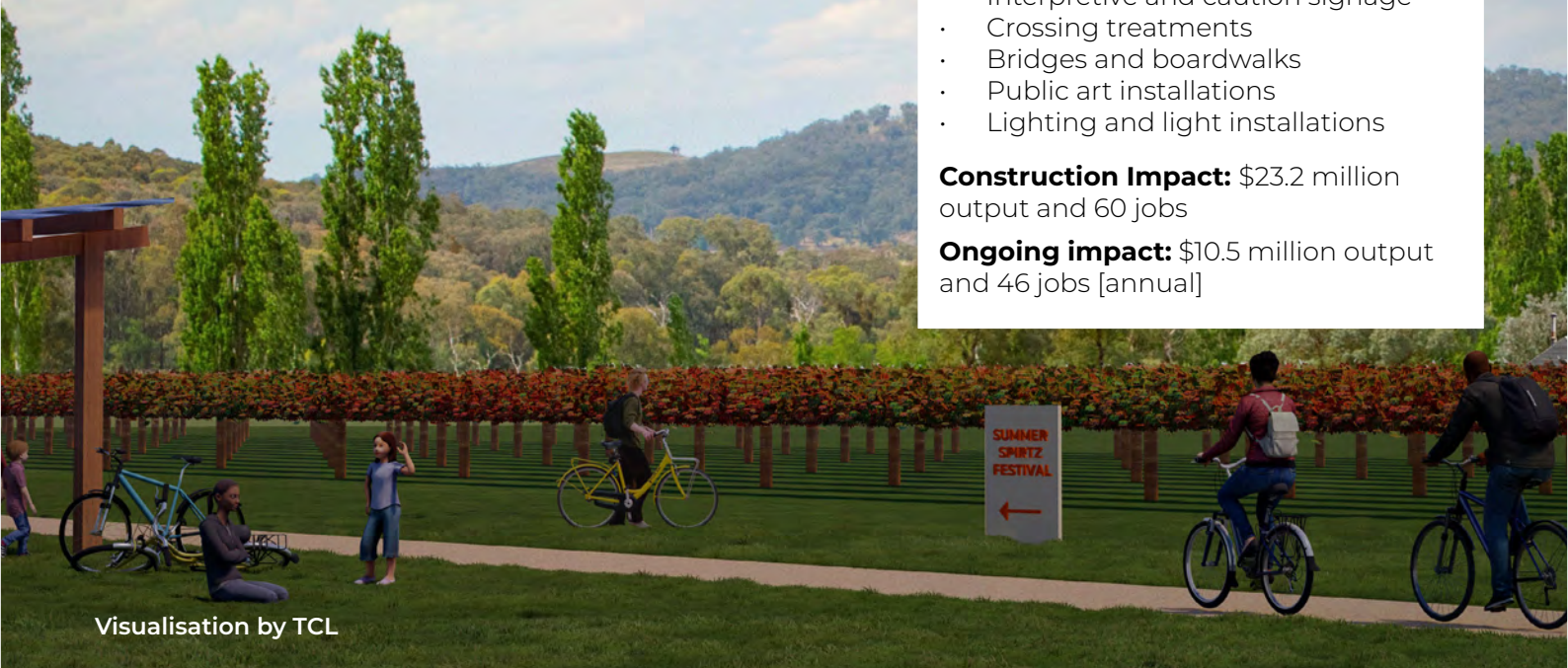
The Prosecco Trail will provide a 43.4 km shared use trail within the road reserve between Oxley and Cheshunt. The trail will link tourism experiences and townships for residents and visitors.

The trail investment includes:

- Option of a natural or sealed trail
- Interpretive and caution signage
- Crossing treatments
- Bridges and boardwalks
- Public art installations
- Lighting and light installations

Construction Impact: \$23.2 million output and 60 jobs

Ongoing impact: \$10.5 million output and 46 jobs [annual]



Visualisation by TCL

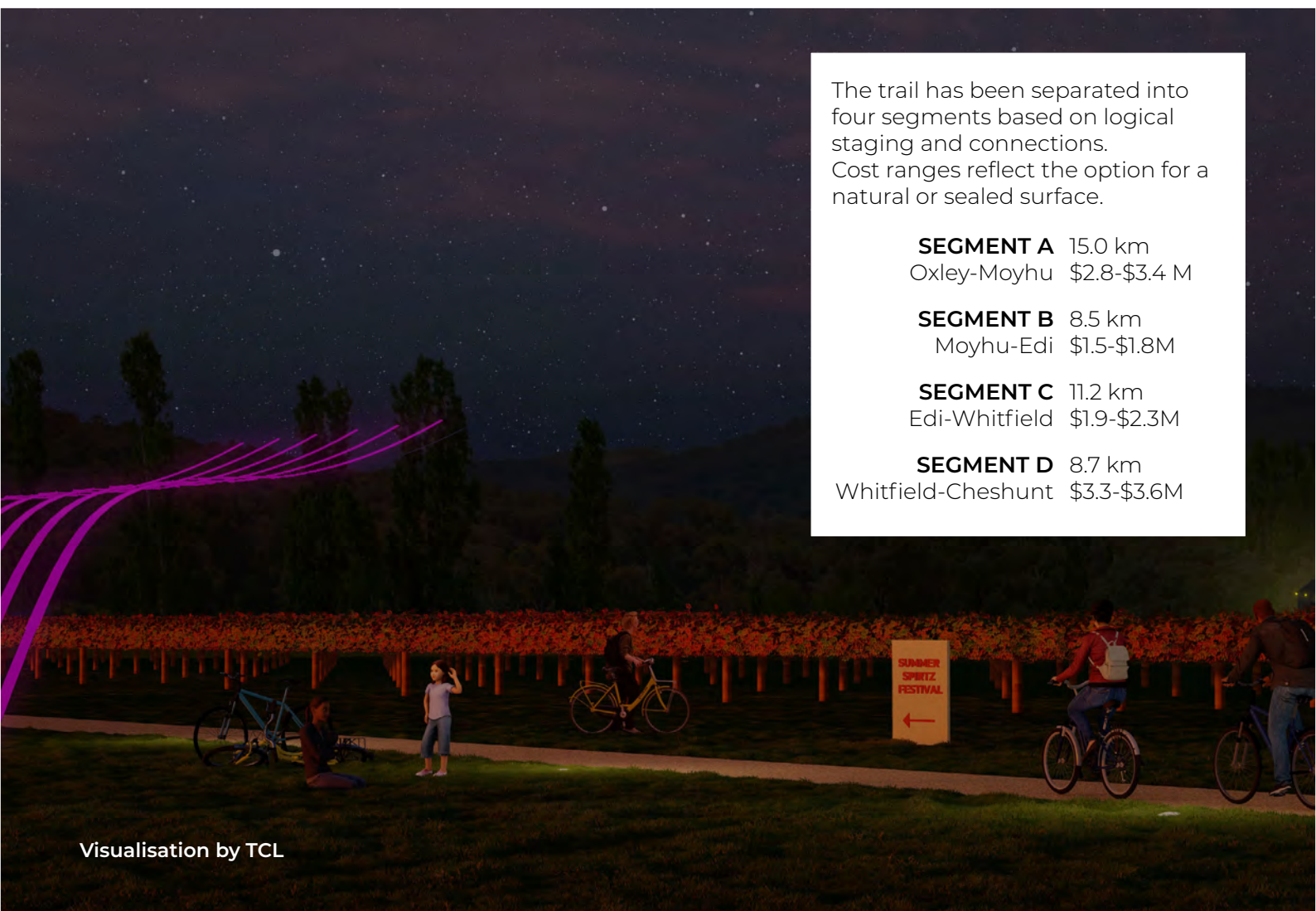
The trail has been separated into four segments based on logical staging and connections. Cost ranges reflect the option for a natural or sealed surface.

SEGMENT A 15.0 km
Oxley-Moyhu \$2.8-\$3.4 M

SEGMENT B 8.5 km
Moyhu-Edi \$1.5-\$1.8M

SEGMENT C 11.2 km
Edi-Whitfield \$1.9-\$2.3M

SEGMENT D 8.7 km
Whitfield-Cheshunt \$3.3-\$3.6M



Visualisation by TCL

TIER 1 PRIORITY INVESTMENT

Public sector investment of \$23.6 million is required to deliver three priority business case projects that will activate and revitalise the King Valley.

This includes the following projects:

- **Destination Enhancement and Township Revitalisation**, through Gateway Sculptural Interventions at Oxley and Whitfield and Township Revitalisation at Milawa, Oxley, Moyhu, Whitfield and Cheshunt
- **Boutique Luxury Hotel** in Whitfield
- **Prosecco Trail**, a shared-use trail between Oxley and Cheshunt.

The priority investment projects for the King Valley have been shown overleaf. This highlights key interventions in the landscape and townships that will activate, enhance and revitalise the region.

Delivery of these projects, along with a suite of projects detailed across the following pages, will transform the visitor experience and allow the King Valley to reach its visitor economy potential.

Renders have been prepared by TCL to visualise the township revitalisation of hero towns Milawa and Oxley, a gateway intervention for the Oxley roundabout, a boutique luxury hotel in Whitfield, and the Prosecco Trail.

ECONOMIC IMPACT OF TIER 1 PRIORITY INVESTMENTS

BUSINESS CASE PROJECTS

Investment in the three priority business case projects will have major economic benefits for the Hume region. This includes public sector investment of \$23.6 million and private sector investment of \$30 million.

Expenditure on construction will deliver short term economic benefits of \$110 million in output and 284 construction jobs. Increased expenditure by visitors will deliver \$101 million in additional output and 467 ongoing jobs in the Hume region.



**\$23.6M PUBLIC
\$30M PRIVATE**

INVESTMENT ASK



**+38,400 VISITORS
+\$57M SPEND**

VISITATION
BENEFIT



**+\$111M OUTPUT
+284 JOBS**

CONSTRUCTION
BENEFIT



**+\$101M OUTPUT
+467 JOBS**

ONGOING BENEFIT
[ANNUAL]

TIER 2 PROJECT PROFILES

THEME 1 DESTINATION ENHANCEMENT AND TOWNSHIP REVITALISATION

SECONDARY GATEWAYS

**Markwood, Myrrhee, Glenrowan North and
Whitlands \$450K [public]**

Provision of signage at secondary gateways to signify entry to the King Valley, such as signage or a smaller scale sculptural intervention.

Key locations include Markwood on Snow Road (en route to Milawa from Myrtleford/Bright), Entry to Myrrhee (at the intersection of Wangaratta-Kilfeera Rd and Benalla Whitfield Rd), Snow Road from the Hume Highway and Whitlands towards Tolmie.

Specific secondary gateway locations should be investigated as part of the Wayfinding Signage Strategy.

WAYFINDING SIGNAGE STRATEGY AND IMPLEMENTATION

Region-wide \$1M [public]

Outside of township signage, there is a need for enhanced wayfinding signage to enable visitors to understand the region, its wineries and other attractions.

A strategy is required for this, and should include removal of obsolete signage and guidelines for future signage use.

REMOVAL OF MILAWA GOURMET REGION SIGNAGE

Region-wide \$100K [public]

Removal of the Milawa Gourmet Region signage, including both business and destination signage, will create cohesion across the region and will allow the King Valley to lead with the most well-recognised brand.



THEME 2 ACCOMMODATION

HIGH QUALITY HOLIDAY PARK

Region-wide \$7.5M [private]

The establishment of a high quality, 80-100 room holiday park that leverages the natural assets of the Cheshunt area and caters to the RV, caravan and camping market.



Source: RACV Cobram

LARGE SCALE STANDARD SELF-CONTAINED

Region-wide \$3M [private]

Delivery of large-scale self-contained houses to fill a critical gap in the accommodation market to service large family or friend groups. (6-8 houses).

This accommodation would cater to the current lack of supply for this typology for larger groups in the region.



Source: Wotif

THEME 3 TRAILS AND NATURE-BASED

RIVERFRONT PRECINCT ACTIVATION

Region-wide \$800K [public]

Formalise and improve access points to the King River to enhance the visitor experience and activate the river.

This should include the creation of placenames for swimming holes and formalise infrastructure, including inland water safety signage, sand/grass water frontage, and seating areas.

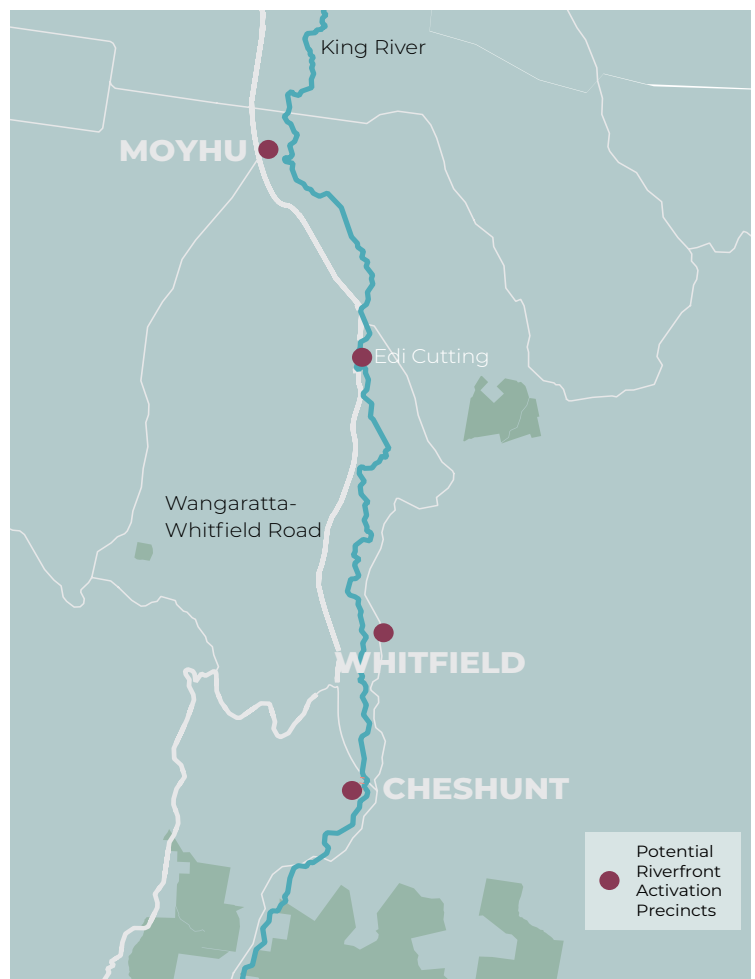
Key locations for river access should include:

- Cheshunt
- Edi Cutting
- Gentle Annie Caravan Park
- Moyhu

These locations have strong linkages with townships and will promote additional spend by visitors in towns.



Ovens River Activation at Porepunkah



Potential Riverfront Activation Locations

THEME 4 FOOD, DINING AND HOSPITALITY

KING VALLEY FARMERS MARKET

Milawa and Whitfield \$150K [public]

Development of a weekly farmers market that rotates fortnightly between Milawa and Whitfield. This will reinforce the role of Milawa and Whitfield as anchor towns, will unify the Upper and Lower King Valley, provide a platform to showcase local produce and will create a new experience for visitors. Infrastructure at parkland sites in Milawa and Whitfield will be required to support the market.



Milawa producers market

SUMMER SPRITZ SESSIONS

Region-wide \$200K [public]

Live music sessions across the King Valley to activate weekends during peak summer season. There is potential to establish an aperol spritz theme using local Prosecco.



Adelaide Hills Crush Festival

PROVIDORE

Whitfield/Moyhu \$1M [private]

Development of a local produce store (providore) will allow the region to showcase local produce and provide access for visitors to purchase. An example is the Stringer café in Sorrento, which has local produce integrated with a café and wine sales. This could also double as a bar if opened at night time.



Talbot Providore and Eatery

THEME 5 INFRASTRUCTURE AND PLANNING

WANGARATTA-WHITFIELD ROAD ENHANCEMENTS

Oxley-Whitfield \$10M [public]

Enhance the quality and safety of the Wangaratta-Whitfield Rd to improve safety for residents and visitors. This should include surface levelling and resealing, and shoulder sealing.

PLANNING FOR DEVELOPMENT

Region-wide [public]

RCoW to continue to deliver Township Development Plans and rezone land to support growth where required.

This will ensure the King Valley has the appropriate town infrastructure, land for residential and commercial development, and the population base to support growth in the tourism industry.

TELECOMMS IMPROVEMENT

Region-wide \$3M [public]

Advocate for improved telecommunications across the region. There is a need for at least 5 towers to support a high performing telecommunications network.

THEME 6 BRANDING AND MARKETING

BRANDING AND MARKETING STRATEGY

Region-wide, \$100K [public]

RCoW and TNE to lead the development of a branding and marketing strategy for the King Valley. This should include engagement with key industry stakeholders and local tourism associations (LTA's) to ensure the destination brand is reflective of local aspirations, whilst also ensuring the brand is unified and responds to market perceptions and opportunities.

The marketing component should review all existing websites and collateral to deliver a consistent methodology moving forward.

TOURISM GOVERNANCE REVIEW

Region-wide, \$50K [public]

Review the existing local tourism association (LTA) governance model, with a view to establishing one overarching LTA for the King Valley. This should aim to involve the existing LTA's working together.

THEME 7 BUSINESS DEVELOPMENT AND ENHANCEMENT

BUSINESS ENHANCEMENT PROGRAM

Region-wide \$150K [public]

Develop a business enhancement program that provides grants to tourism and hospitality businesses in the King Valley to support business amenity upgrades, improvements to business offerings, and support for marketing and business planning.

KING VALLEY AMBASSADOR PROGRAM

Region-wide \$100K [public]

Develop an action plan for delivery of a partnership program with a high-profile Melbourne-based hospitality figure. Ideally, this should be a Victorian or New South Wales based chef that can promote the region to the hospitality sector and influence development of a skilled local workforce. This is also likely to attract new investment into the region through increased awareness.

IMPLEMENTATION ROADMAP

The roadmap for implementation of the Activating King Valley Prosecco Road Project is detailed across the following pages.

This includes identification of the lead proponent, indicative delivery timeframe, indicative planning and design costs (publicly funded) and indicative capital development costs (both public and private sector investment). Planning and design costs that are to be borne by the private sector are included as part of the estimated capital development costs.

The following acronyms have been used in the project lists.

DELWP - Department of Environment, Land, Water and Planning

RCoW - Rural City of Wangaratta

RRV - Regional Roads Victoria

TNE - Tourism North East

Tos - Traditional Owners



THEME 1
**Destination Enhancement and
 Township Revitalisation**

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
Revitalise Milawa	Deliver a suite of improvements for Milawa including streetscaping, plantings, lighting, improved carparking and bus parking in town centre, pedestrian crossings at key intersection and park enhancement.	Milawa	1	2021-23	RCoW	\$270K public	\$1.3M public
Revitalise Oxley	Enhance the Oxley streetscape through increased boulevard planning and highlighting of the bike path through wayfinding and path continuity at intersections.	Oxley	1	2021-23	RCoW	\$20K public	\$90K public
Revitalise Moyhu	Increase the amenity of Moyhu as a visitor destination through median boulevard planting, pedestrian crossing from Moyhu Hotel to Carl Schultz Reserve. Landscaping for Carl Shultz Reserve and Moyhu Beach.	Moyhu	1	2021-23	RCoW	\$220K public	\$1.1M public
Revitalise Whitfield	Major revitalisation of the Whitfield Town Centre will ensure the King Valley is recognised as a premium visitor destination and offers a high quality visitor experience. Upgrades will include plantings and street trees, footpaths, lighting, a new T-intersection in front of Mountain View Hotel, and a sewerage solution.	Whitfield	1	2021-23	RCoW	\$1M public	\$4.9M public
Revitalise Cheshunt	Enhancement of Cheshunt will include improved pedestrian infrastructure through wheelstops and footpath access to the King River, bollards and tree plantings to reinforce road barriers, improved boulevard planting. Cheshunt Public Hall Park upgrade is allowed for.	Cheshunt	1	2021-23	RCoW	\$130K public	\$650K public
Primary Gateway at Oxley	Deliver a sculptural intervention at the Oxley roundabout, the primary gateway to the King Valley at the northern end of the region. This gateway should respond to and amplify the surrounding landscape of the flat Oxley Plains, and provide an experience that signifies entry into the King Valley. The design concept should be cohesive with the Whitfield gateway and reinforce the King Valley brand attributes.	Oxley	1	2021-23	RCoW	\$200K public	\$800K public
Primary Gateway at Whitfield	Deliver a sculptural intervention at the southern primary gateways to the King Valley, upon entrance to Whitfield as the valley widens. The design concept should be cohesive with the Oxley gateway and reinforce the King Valley brand attributes.	Whitfield	1	2021-23	RCoW	\$150K public	\$600K public

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
Secondary Gateways	Provision of signage at secondary gateways to signify entry to the King Valley, such as signage or a smaller scale sculptural intervention. Key locations include Markwood on Snow Road (en route to Milawa from Myrtleford/Bright), Entry to Myrrhee (at the intersection of Wangaratta-Kilfeera Rd and Benalla Whitfield Rd), Snow Road from the Hume Highway and Whitlands towards Tolmie.	Markwood, Myrrhee, Glenrowan North and Whitlands	2	2021-22	RCoW	\$90K public	\$450K public
Wayfinding Signage Strategy and Implementation	Outside of township signage, there is a need for enhanced wayfinding signage to enable visitors to understand the region, its wineries and other attractions. A strategy is required for this, and should include removal of obsolete signage and guidelines for future signage use.	Region-wide	2	2021-22	RCoW	\$100K public	\$1M public
Removal of Milawa Gourmet Region Signage	Removal of the Milawa Gourmet Region signage, including both business and destination signage, will create cohesion and will allow the region to lead with the most well-recognised brand.	Milawa, Oxley, Tarrawingee, Everton, Markwood, Whorouly	2	2022-23 [Following wayfinding strategy]	RCoW		\$100K public
Rename Wangaratta-Whitfield Rd	Undertake application to rename Wangaratta-Whitfield Road to King Valley Road.	Region-wide	3	2022-23	RCoW		
King Valley Public Art Program	Employ a street artist to deliver public art to activate the King Valley and its townships. A strategy for the public art program should be prepared to ensure the art is aligned to the vision for the King Valley and its brand.	Region-wide	3	2023-25	RCoW	\$50K public	\$1.5M public
Prosecco Trail Interpretation	Explore the opportunity for Indigenous interpretation and recognition along the trail length. This should be led by Traditional Owners in collaboration with Council.	Region-wide	3	TBC [Following Trail Investment]	RCoW	\$50K public	\$500K public

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
Indigenous reconciliation in Oxley	Engagement with Traditional owners to investigate the potential for development of a commemorative reconciliation site at the massacre site located in Oxley Plains.	Oxley	3	2022-26	RCoW	\$50K public	\$250K public
Strengthen of Powers Lookout	Enhance Powers Lookout through enhanced directional and interpretive signage to convey the story behind the site and the significance of the view.	Whitlands	3	2023-24	RCoW	\$40K public	\$00K public
Strengthen Whitlands Lookout Reserve	The expansive view at the Whitlands Lookout Reserve can be leveraged through delivery of a climable sculpture or an artistic bench; a piece that entices tourists to take a photo but sits secondary to the view.	Whitlands	3	2024-25	RCoW	\$60K public	\$500K public
Visiting artist program	Develop a visiting artist program to develop an arts and cultural scene across the region. This could be delivered by Tourism North East as a region-wide initiative, which could also investigate the use of disused heritage buildings for the program. This would help to activate heritage buildings and town centres.	Region-wide	3	2023-26	TNE	\$100K public	

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
Boutique Luxury Hotel	Develop a boutique luxury hotel in either Whitfield or Cheshunt with a capacity of 40-60 rooms. This would include a premium food experience that offers high quality local produce and wine, ideally co-located at one of the region's established wineries.	Whitfield/Cheshunt	1	2021-23	Private sector	\$300K public [planning and amendments if required]	\$30M private
Holiday Park	The establishment of a high quality, 80-100 room holiday park that leverages the natural assets of the Cheshunt area and caters to the RV, caravan and camping market.	Cheshunt	2	2022-24	Private sector	\$300K public [planning and amendments if required]	\$7.5M private
Large Scale Standard Self-Contained	Delivery of large-scale self-contained houses to fill a critical gap in the accommodation market to service large family or friend groups. (6-8 houses).	Region-wide	2	2021-23	Private sector		\$3M private
Wellness Resort	A nature-based wellness resort style establishment overlooking Lake William Hovell, appealing to the lifestyle leader market.	Lake William Hovell	3	2023-26	Private sector	\$300K public [planning and amendments if required]	\$15M private
Luxury Self-Contained	Development of a range of luxury self-contained accommodation typologies, including stand alone houses/units and small complexes of 4-8 units. This will service the Lifestyle Leader Market.	Region-wide	3	Ongoing	Private sector		\$4M private
Midscale Hotel	Develop a mid-scale hotel in Milawa or Oxley, including facilities such as conferencing, dining, pool, gym and activities for children. This would cater to lifestyle leaders, particularly adult couples, as well as the business events market.	Milawa/Oxley	3	2022-25	Private sector	\$300K public [planning and amendments if required]	\$8M private
Continue Investment in Gentle Annie Caravan Park	Gentle Annie Caravan Park is a Crown Land reserve leased to a private operator. The site receives high usage however the facilities and amenities do not meet visitor expectations. Upgrade to the facilities will provide an improved visitor experience. Further investment requires extension of the existing leasehold agreement.	Whitfield	3	2021-23	Private sector	\$50K public [planning and leasehold]	\$2M private
Amenity upgrades to Edi Cutting Reserve	Enhance Edi Cutting Reserve through upgraded toilet facilities, additional bins and improved rubbish collection, and improved signage.	Whitfield	3	2022-24	Private sector	\$80K public [planning]	\$1.5M public

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
Prosecco Trail	A 43.4-kilometre shared use trail within the road reserve between Oxley and Cheshunt, linking tourism experiences and townships for residents and visitors.	Oxley-Cheshunt	1	2021-24		\$1.1M public	\$12.1M public
Riverfront precinct activation	Identify key river access points to the King River, create placenames for swimming holes and formalise infrastructure including inland water safety signage, sand/grass water frontage, and seating areas.	Region-wide	2	2021-22	RCoW	\$160K public	\$640K public
McMillians Track formalisation	Formalise the McMillians Track to provide walking access to Paradise Falls. This should include trail signage and minor trail works where required. This will provide an additional walking product for the Upper King Valley.	Cheshunt	3	2021-22	RCoW	\$40K public	\$160K public
Cheshunt equipment hire hub	Deliver a nature-based equipment hire hub at Cheshunt to facilitate access to King River, Lake William Hovell and the Alpine National Hub. This could include equipment hire such as canoes, fishing equipment, road and mountain bikes and swimming inflatables. This could be a kiosk located within the Cheshunt Public Hall site and co-located with other visitor facilities such as a coffee van.	Cheshunt	3	2021-23	Private sector	\$20K public	\$700K public
Milawa cycle link	Extension of rail trail from Milawa Recreation Reserve along Snow Road to Markwood and continuing to Bright rail trail. Includes feasibility of route via Whorouly vs. Everton.	Milawa	3	2022-24	RCoW	\$150K public	\$650K public

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
King Valley Farmers Market	Development of a weekly farmers market that rotates fortnightly between Milawa and Whitfield. This will reinforce the role of Milawa and Whitfield as anchor towns, will unify the Upper and Lower King Valley, provide a platform to showcase local produce and will create a new experience for visitors. Infrastructure at parkland sites in Milawa and Whitfield will be required to support the market.	Milawa	2	2022	Private sector	\$50K public	\$100K public [p.a.]
Summer Spritz Sessions	Live music sessions across the King Valley to activate weekends during peak summer season. Potential to have an aperol spritz theme using local Prosecco.	Region-wide	2	2021-23	RCoW / TNE / Private Sector	\$40K public	\$200K public [p.a.]
Providore	Development of a local produce store (providore) will allow the region to showcase local produce and provide access for visitors to purchase. An example is the Stringer café in Sorrento, which has local produce integrated with a café and wine sales. This could also double as a bar if opened at night time.	Whitfield / Moyhu	2	2021-23	Private sector		\$1M private
Prosecco and wine bar	Delivery of a destination wine bar to provide an evening activity for visitors, showcase local wines and increase visitor satisfaction. There is potential for this to be private sector led or run as a co-op between local industry operators.	Whitfield	3	2021-23	Private sector		\$1M private
Destination café in Whitfield	Delivery of a destination quality cafe in Whitfield, ensuring the establishment is architecturally designed and maximises the rural character and outlook to align to visitor preferences.	Whitfield	3	2021-23	Private sector		\$1M private
Expansion of Farm Gate Experiences	Encourage agricultural businesses to develop a farmgate hospitality experience that will activate the region.	Region-wide	3	Ongoing	Private sector		
Destination artisan bakery	There is opportunity to create a destination artisan bakery that aligns to visitor quality expectations, similar to the Milawa Bread and Milawa Kitchen. This would be particularly well suited to Whitfield, which currently lacks a bakery or breakfast options.	Whitfield	3	2021-23	Private sector		\$750K private

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
Peak Season Pop Ups	Pop up food trucks / kiosks to service visitors in the peak season, offering takeaway coffee, breakfast and lunch options. Potential to service key nature-based and camping locations such as Edi Cutting, Lake William Hovell, and Gentle Annie Caravan Park.	Region-wide	3	2022-23	Private sector		
Picnic in the vines	Facilitate businesses to develop a picnic in the vines experience. This could be similar to the curated picnic experience delivered by Montalto on the Mornington Peninsula.	Region-wide	3	2021-23	Private sector		\$100K private
Locally produced aperitive and grapperiera	Establishment of a local Italian style distillery producing high quality grappa and an other apperative products simailr to Aperol. This would create a new destination that builds on the Italian wines of the Valley.	Region-wide	3	2022-24	Private sector		\$2.5M private
Bushfood opportunities	Engage with Traditional Owners to explore opportunities to grow native bushfoods in the King Valley.	Region-wide	3	2023-26	TO's		

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
Wangaratta-Whitfield Road enhancements	Enhance the quality and safety of the Wangaratta-Whitfield Rd to improve safety for residents and visitors. This should include surface levelling and resealing, and shoulder sealing.	Region-wide	2	2021-23	RRV	\$1M public	\$10M public
Planning for development	Deliver Township Development Plans and rezone land to support growth where required.	Region-wide	2	Ongoing	RCoW	\$50K public	
Telecomms Upgrade	Advocate for improved telecommunications across the region. There is a need for at least 5 additional towers. Total development cost is based on average cost estimates per tower.	Region-wide	2	2021-23	RCoW		\$3M public
Investigate transport solution	Undertake feasibility study to establish a co-operative or community led wine bus to assess the viability of the model. A transport solution should consider the need for consistency (i.e. run consistently every weekend).	Region-wide	3	2021-22	RCoW	\$30K public	
King River crossing at Gentle Annie Lane	There is a requirement for a pedestrian bridge across the King River at Gentle Annie. This will provide increased safety for this high traffic location.	Whitfield	3	2021-22	RCoW	\$100K public	\$1M public
Myrree gravel road sealing	Seal the 5km section of gravel road on Benalla-Whitfield Rd between Benalla and Whitlands, to improve safety and provide alternative access from Melbourne to the Upper King Valley.	Myrree	3	2021-23	RCoW		\$3.5M public
Electric vehicle charging stations	Delivery of electric vehicle charging stations in Milawa and Whitfield to encourage visitation and town centre stopover and spend.	Milawa and Whitfield	3	2022-25	RCoW	\$50K public	\$500K public

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
Branding and Marketing Strategy	<p>RCoW and TNE to lead the development of a branding and marketing strategy for the King Valley. This should include engagement with key industry stakeholders and local tourism association's (LTA's) to ensure the destination brand is reflective of local aspirations, whilst also ensuring the brand is unified and responds to market perceptions and opportunities.</p> <p>The marketing component should review all existing websites and collateral to deliver a consistent methodology moving forward.</p>	Region-wide	2	2021-22	RCoW & TNE	\$100K public	
Tourism Governance Review	Review LTA governance model, with a view to establishing one overarching LTA for the King Valley region. This should involve the existing LTA's working together.	Region-wide	2	2021-22	RCoW	\$50K public	

THEME 7

Business Development and Enhancement

Project	Description	Location	Tier	Year	Lead	Plan & Design Cost	Capital Cost
Business Enhancement Program	Develop a business enhancement program that provides grants to tourism and hospitality businesses in the King Valley to support business amenity upgrades, improvements to business offerings, and support for marketing and business planning.	Region-wide	2	2021-22	RCoW / TNE	\$150K public	
King Valley Ambassador Program	Develop an action plan for delivery of a partnership program with a high-profile Melbourne-based hospitality figure. Ideally, this should be a Victorian or New South Wales based chef that can promote the region to the hospitality sector and influence development of a skilled local workforce.	High Country	2	2022-26	TNE	\$20K public [planning]	\$100K public
Hospitality Advisory Program	Engage a hospitality consultant to provide advisory services to hospitality businesses. This should provide businesses with advice on their offer, positioning, marketing, branding and physical improvements.	Region-wide	3	2021-22	RCoW / TNE	\$200K public	
Improved Training	Establish relationships with training providers, particularly Wangaratta GoTAFE. Ensure training is aligned to industry needs through workshops and partnerships with key businesses or an overarching tourism association.	Region-wide	3	2021-24	TNE	\$100K public	
Heritage Reuse Program	Investigate reutilisation and repurposing of heritage buildings and infrastructure, such as the disused church in Myrrheee and old tobacco kilns.	Region-wide	3	2024-26	RCoW	\$20K public	
Italian Action Plan and Visiting Chefs Program	Develop a long-term Action Plan to create links with regional Italy and also high-profile Italian restaurants in Melbourne. This program may include visits from renowned guest chefs, winemakers, media, food societies, arts/culture performances and other workshops and events. This should include a range of both industry and consumer events.	Region-wide	3	2024-28	RCoW / TNE	\$50K public	\$100K public \$100K private

