



Tourism Ecosystem Mapping and Investment Roadmap Report

For Omeo and Region

August 2025



This Tourism Ecosystem Mapping and Investment Roadmap for Omeo and Region was prepared by TRC Tourism as the first stage in the development of the Omeo and Region Investment Prospectus.

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ACCRONYMS

TERM	DEFINITION
DGL	Destination Gippsland
EGSC	East Gippsland Shire Council
MTB	Mountain Biking
ORBTA	The Omeo Region - Business and Tourism Association

ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Indigenous peoples of the lands, waters and communities we work together with. We pay our respects to their cultures; and to their Elders – past, present and emerging.

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Executive Summary

With appropriate investment and community engagement, Omeo and its surrounding towns are well positioned to become a leading nature and trail-based tourism destination in regional Victoria, offering meaningful benefits for both residents and visitors.

This Tourism Ecosystem Mapping and Investment Roadmap provides a strategic overview of the current tourism assets, service gaps and investment opportunities across Omeo and its surrounding communities, including Swifts Creek, Ensay, Benambra, Cobungra and Cassilis. This region of East Gippsland is undergoing a significant transformation, partly initiated by the development of the Omeo Mountain Bike Park and renewed interest in nature-based, cultural and adventure tourism.

Tourism in Omeo and surrounding communities is currently supported by its unique alpine landscapes, proximity to the Alpine National Park, and growing reputation as a high-country escape. The opening stages of the Omeo Mountain Bike Park have introduced a nationally significant attractor, with strong potential to position Omeo and districts, as a leading year-round trail-based tourism destination.

However, the area currently faces gaps in market aligned accommodation, a diverse range of food and beverage options, commercial services such as shuttles and equipment hire, and visitor information infrastructure. If these gaps are not strategically addressed, they could limit the district's tourism growth. To fully capitalise on these opportunities and meet market expectations, targeted investment is essential.

This report presents the key findings and a practical roadmap designed to support investment attraction, regional coordination, and destination planning. The recommendations will guide East Gippsland Shire Council (EGSC), the Omeo Region Business and Tourism Association (ORBTA), local stakeholders, and potential investors in strengthening the tourism ecosystem and unlocking the full potential of the region. With strategic support, the Omeo and region has the potential to become one of Victoria's premier adventure and nature-based tourism destinations - delivering economic benefits and enriching community identity.

Recommendations:

- Strengthen Omeo's trail town appeal by aligning branding, enhancing signage, improving interpretive materials, and upgrading visitor services including toilets, car parking and access to information (online, in person and through pre visit packaging)
- Leverage the Omeo Mountain Bike Park as an anchor attraction by investing in supportive infrastructure and hosting events that draw visitors year round
- Address workforce barriers and delivering housing suitable for business staff, which is currently a constraint for local enterprises.

Investment opportunities identified include:

- Expansion of accommodation options suited to trail users and year-round visitors
- Development of trail-related commercial services (e.g. bike hire, guided tours, food vans, local produce outlets)
- Creation of event infrastructure to attract regional and national mountain bike (MTB) events
- Enhancements to digital and on-ground visitor information and wayfinding
- Opportunities for cultural tourism development and nature-based experiences linked to the region's alpine environment and heritage.

1 Introduction

1.1 Purpose of the Project

The purpose of this project is to deliver a comprehensive Tourism Ecosystem Mapping and Investment Roadmap for the Omeo region. This initiative, led by the East Gippsland Shire Council (EGSC), aims to support sustainable growth of the local visitor economy by:

- Auditing and mapping existing tourism assets and services (accommodation, food, retail, experiences, servicing)
- Identifying gaps and opportunities in the visitor economy that align with the region's vision and positioning
- Developing a clear investment roadmap, including pathways to facilitate tourism development, remove barriers and prioritise action.

The information will be used to present an evidence-based prospectus of data-driven insights and strategic opportunities, attracting and guiding potential investors.

1.2 Methodology and Approach

The methodology for this project was structured into four key phases:

- **Phase 1:** Project planning and design
- **Phase 2:** Research and analysis, including a site visit to assess current tourism products, services and facilities. Phase 2 included market analysis of target segments and projected growth, data modelling, identification of service gaps, market opportunities, investment barriers and risk analysis.
- **Phase 3:** Development of the investment roadmap supported with stakeholder engagement with businesses, agencies and community groups.
- **Phase 4:** Development of a compelling, data-driven Investment Prospectus.



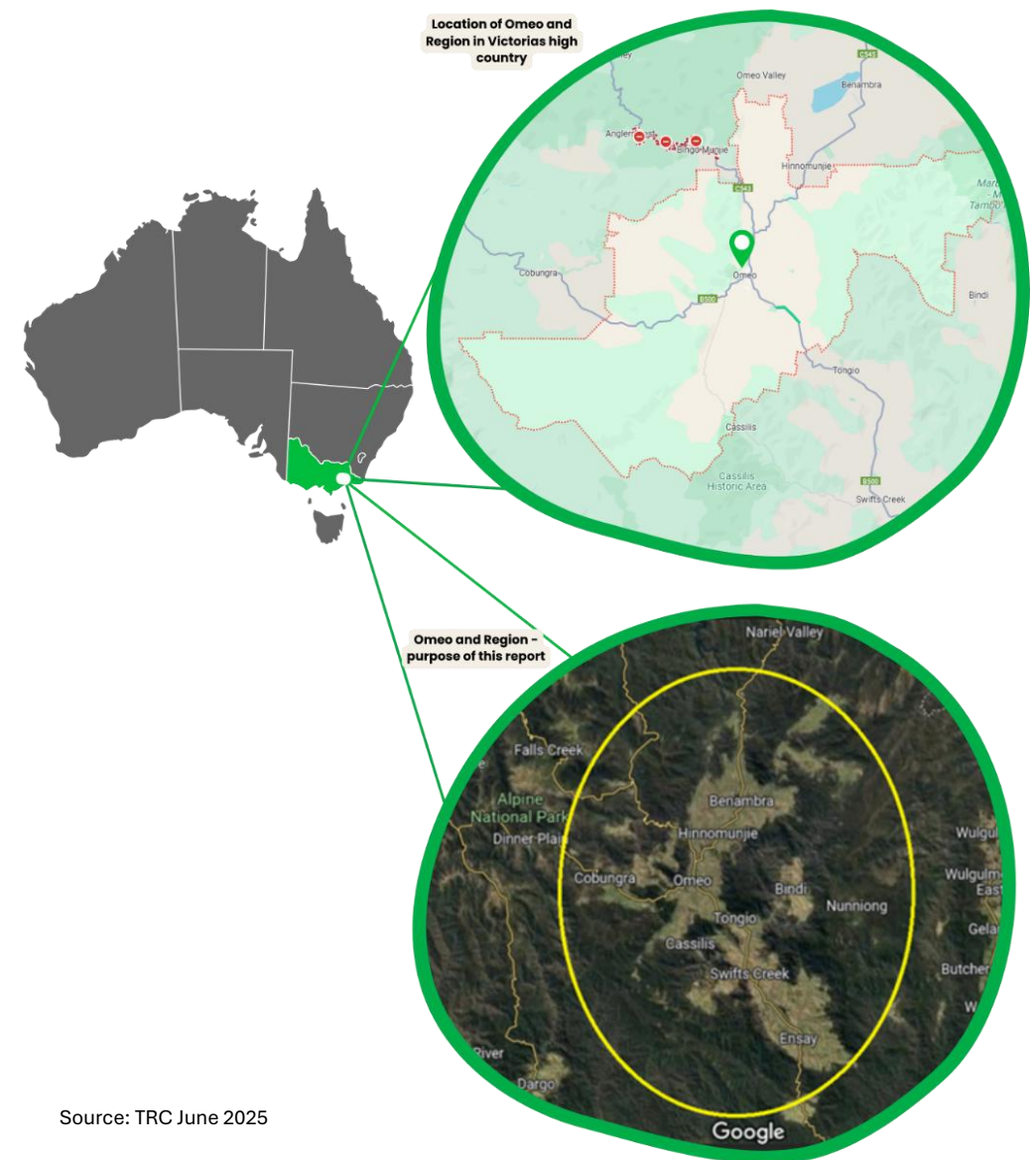
1.3 Location – Omeo and Region

Omeo and surrounding towns sit on the southern rises of the Australian Alps at approximately 640m above sea level. Omeo is in many respects the heart of the Victorian high country, and is centred on the Great Alpine Road, a touring route of national significance and is approximately 120km from Bairnsdale, and 40km from Dinner Plain. It is a service centre for the region and one of the gateways to Victoria's ski slopes (Figure 1)

Omeo is located 400km from Melbourne, 760km from Sydney and 470 km from Canberra and is accessed predominantly by road, with the nearest airport being Mount Hotham, a private facility, and scheduled bus services through Omeo that link up with train terminals at both Bairnsdale and Albury.

This project area also includes the surrounding localities of: Swifts Creek, Benambra, Ensay, Cobungra, Bindi, Nunniong, Cassilis, Anglers Rest, Hinnomunjie and Tongio (Figure 1). The area is sustained by a mix of farming, tourism, timber and mining with potential renewed activity should the proposal to open the Benambra mine proceed. Omeo has a long history of producing fine beef from the high country which continues today. At the time of preparation of this report, the Victorian Government had announced that the Victorian timber industry will transition from native forest harvesting to plantation-based timber products by 2030. The implications of this transition are not yet fully understood for the region although various programs are currently underway to support the region.

Figure 1. Map of Omeo and Region









Source: TRC June 2025

1.4 Access

Omeo is approximately a five-hour drive from Melbourne via either Gippsland or Bright and Mount Hotham, making it a significant journey from the state’s main population centre. While the distance and travel time can be a barrier, both routes offer opportunities to develop stopover experiences, partner with businesses and regions along the way, and promote scenic drives and local attractions. Addressing travel challenges by enhancing these opportunities can help attract more visitors and support regional economic growth.

Omeo also sits on the Great Alpine Road touring route which travels from Wangaratta in the north-east across to Metung on the Gippsland Lakes. The 339km drive takes approximately 5 hours in total.

The main access routes into Omeo are:

	Self-drive via the Great Alpine Road (B500), Omeo Highway (C543) or Benambra Road (C545)
	Hotham Airport – secondary options being Albury Airport and Melbourne Tullamarine Airport
	Scheduled bus services through Omeo that link up with train terminals at Bairnsdale and Albury
	Self-drive Omeo Highway north through Glen Wills into the Murray Valley
	Self-drive the sealed summer only access road through Falls Creek into the Mount Beauty and Kiewa Valley area, and
	Self-drive from Canberra – a significant potential source market (470 km)

¹ <https://profile.id.com.au/east-gippsland/population-estimate?WebID=180>

1.5 People and Place

The population estimate for the region is 1,122. Since the previous year, the population has grown by 0.43%. Population growth in East Gippsland Shire was 0.50%.¹ The following table shows the population by towns.

Table 1. Population of Towns in the Region

TOWN	POPULATION
Omeo	411
Swifts Creek	232
Benambra	173
Ensley North	29
Ensley	155
Bindi	49
Cassislis	21
Hinnomunji	21
Tongio	50
Anglers Rest	31

Source: <https://profile.id.com.au/east-gippsland/locality-snapshots?WebID=22011200>, and <https://www.abs.gov.au/census/find-census-data/quickstats/2021/SAL20045>

Employment opportunities in Omeo and the broader region are limited, contributing to social and economic constraints in the community. The majority of Omeo and Regions residents worked in agriculture, forestry and fishing – more than any other industry in 2021.²

² <https://profile.id.com.au/east-gippsland/industries?WebID=180>

2 Current Tourism Infrastructure and Services

In compiling this report, TRC Tourism has undertaken an assessment of the existing tourism ecosystem in the region. In compiling the snapshot, it is worth noting that there is not one central location with an inventory of accommodation, experiences, services and other products vital to the sector. This snapshot has been collected from a range of sources including the Business and Tourism Association (Omeo Region Business and Tourism Association ORBTA), web site searches, Australian Tourism Data Warehouse (ATDW), the EGSC and other sources.

Due to the lack of a central source, the information contained in this snapshot is considered as good as is available. This lack of a centralised list either through the EGSC, ORBTA or the visitor information centre is in itself an inhibitor to growth of the region and will be covered in the investment roadmap section of this report.

2.1 Tourism Context - East Gippsland

East Gippsland has tourism and related services as a critical component of its economic activity. Some of the iconic attractions and experiences throughout East Gippsland include the Snowy River, Point Hicks Lighthouse, the Gippsland Lakes and Mitchell River Silt Jetties, the Australian Alps, Australia’s Coastal Wilderness, sections of the Sydney to Melbourne Coastal Drive, Lakes Entrance, Buchan Caves and 90 Mile Beach.

Destination Gippsland is the Regional Tourism Board and is comprised of six Local Government Areas (LGAs), one of which is East Gippsland Shire. Their ‘Towards 2030 Gippsland Destination Management Plan: A Blueprint for Growth’ provides strategic tourism direction for the wider region.

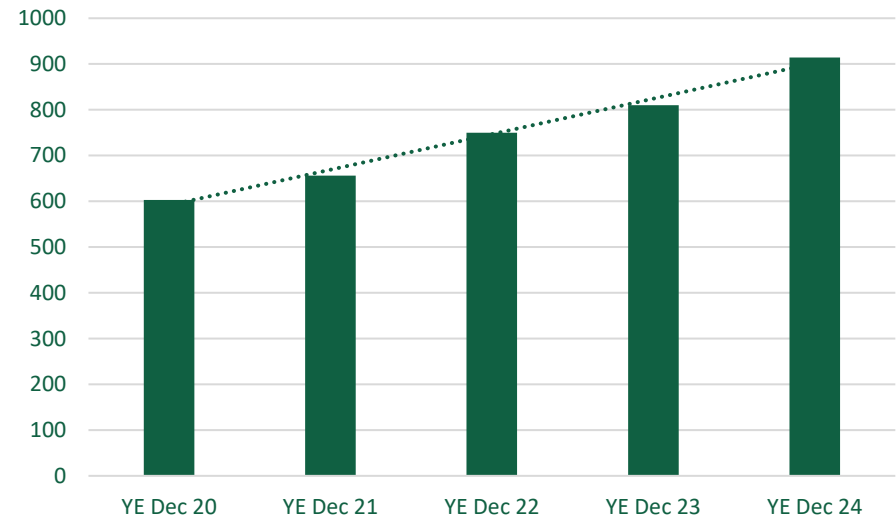
³ <https://assets.visitgippsland.com.au/documents/Domestic-travel-to-Greater-Gippsland-and-Selected-LGAs-YE-December-2024.pdf>

Domestic Overnight Visitors

In the year ending (YE) Dec 24, East Gippsland received 914,000 domestic overnight visitors, as shown in the graph below. This represents +12.9% change on YE Dec 23, and a +51.6% change from YE Dec 20. The average annual growth rate is +12.9%.

Domestic overnight visitors spent on average \$463 million in YE Dec 24 (-2.9% from the previous year), equating to \$165 spend per night.

Figure 2. East Gippsland - Domestic Overnight Visitors ('000)³



Source: Visit Gippsland 2025

Domestic Overnight Visitor Nights

Over the same period, there were 2,803,000 domestic visitor nights in East Gippsland LGA, a +9.1% change on YE Dec 23, and a +32.3% change from YE Dec 20. The average annual growth rate for domestic overnight visitors is +8.1%.

Domestic Daytrips

Over the same period, there were 628,000 day trippers to East Gippsland LGA, a -27% change on YE Dec 23, and a +18.2% change from YE Dec 20. The average annual growth rate for domestic visitors is +4.6%. Most of the LGAs in the Greater Gippsland region showed a decrease in day trips – with the exception of Wellington and Bass Coast Mainland (excludes Phillip Island).

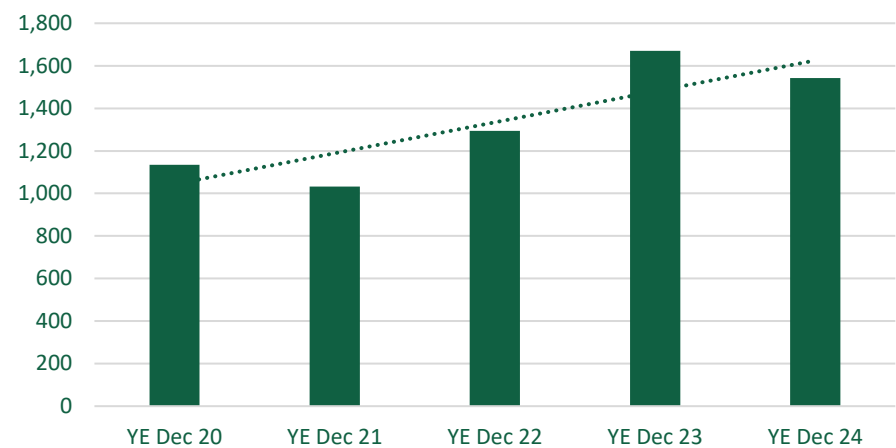
Domestic daytrip visitors spent on average \$62 million in YE Dec 24 (-55.4% from the previous year), equating to \$99 spend per day.

Total Domestic Visitors

The significant decrease in day trippers to the LGA, has impacted the total number of domestic visitors. Total domestic visitors decreased by -7.7% to 1,542,000 in YE Dec 24 (was 1,670,000 in YE Dec 23). Though the LGA still has an average annual growth rate of +9%.

Total domestic visitors spent was on average \$525 million in YE Dec 24 (-14.8% from the previous year).

Figure 3. East Gippsland - Total Domestic Visitors ('000)



Source: Visit Gippsland 2025

2.2 Omeo and Region

Tourism, while currently small, holds strong potential for generating employment and boosting economic investment.

The region’s character is based on the region’s strengths and include:

- Nature (alpine location, mountain scenery)
- Heritage (gold mining, historic buildings, high country huts, First Nations)
- Farming (high country cattle, and other products including more recent additions such as Olive Oil).

During summer, Omeo is a hub for outdoor and adventure activities in the natural environment, including rafting, horse riding, hiking, cycling, fishing, camping, and four-wheel driving. The town also serves as a convenient base for touring both sealed and unsealed routes, such as the Bogong High Plains and the Great Alpine Road.

There are several walking trails in and around Omeo.

In winter, the town functions as an entry point to the ski resorts of Dinner Plain and Mount Hotham, providing fuel, accommodation, food and ski hire services. The road to Mount Hotham from Melbourne via Omeo is generally a safer option and is subject to less closures than the road via NE Victoria.

Mount Hotham Alpine Resort Management is keen to continue to promote Omeo as a more sustainable entry and exit road to the resort for winter operations.

The visitor information centre is operated from Council's Service Centre and is open during business hours. The volunteer run community hub also provides some visitor information.

Accommodation

Omeo and its surrounding region offer a diverse range of accommodation options, including caravan parks, farm stays, hotels, motels, and properties available through the share economy such as Airbnb. TRC's web and desktop research estimates there are approximately 96 rooms and 120 campsites available for easy commercial booking in Omeo and the nearby region. However, local consultation and other reports suggest the total accommodation capacity may be as high as 300 beds when considering all available options.

This supply is further supplemented by AirBNB listings in the broader regional area, as well as additional accommodation options in nearby locations such as Cobungra and Dinner Plain. This variety supports a range of visitor preferences, from budget-friendly camping and caravan sites to family-friendly holiday rentals, boutique cottages, and traditional motels.

Dinner Plain, which services the Victorian ski field of Mount Hotham, is already an established destination and is likely to serve as the primary accommodation hub for Omeo and its surrounds as mountain biking tourism grows. Until new and suitable accommodation is developed in Omeo and nearby areas to meet increasing demand, visitors are expected to rely on Dinner Plain for lodging options.

Retail shopping in the region is limited. The event calendar has some anchor events and some local community based events and includes nearby picnic races, the Rodeo (a major event for the region) markets and agricultural show⁴. The food and wine offer includes a cafe, hotels and a nearby winery.⁵

The Omeo Region as defined earlier in this report currently has in the order of 96 rooms for rent within the visitor economy. A further 120 campsites are available (that are listed). The campsites would not include free camping in the forests and parks surrounding the towns and the district (Refer to Figure 4).

These rooms span across several different towns, and across several different types of accommodation including:

- AirBNB houses and Cottages
- Hotels
- Motels
- Bunk Rooms

They range from 4 star to self-rated and no star accommodation.

A series of 'heat maps' have been developed from the data base that TRC has compiled for this project. A heat map provides a graphic interpretation of the number or relative scale of the data based on a geographical map.

The following heat map (Figure 4) provides a snapshot of the existing accommodation footprint.

The degree to which the accommodation is servicing the existing market is difficult to ascertain. A survey undertaken as part of this project provides an indication of the businesses in the region's appetite for business growth. This could be a proxy for increasing demand.

Camping is predominantly at the Omeo Campground and the Swifts Creek Campground. Omeo campground is Shire owned and leased to a third party to manage the park. Swifts Creek is Council managed with bookings taken through the Swifts Creek General Store.

^{4 4} <https://visitomeo.com.au/events/>

^{5 5} <https://visitomeo.com.au/visit-category/places-to-eat/>

Figure 4. Heatmap of Existing Rooms and Camps Available to The Visitor Economy



Source: TRC Tourism / Nova Economics. June 2025

2.3 Experiences and Attractions

Omeo and its surrounding region offer a rich mix of historic, cultural and outdoor attractions, making it a compelling destination for visitors seeking both heritage experiences and adventure activities. (Figure 5)

Historic and Cultural Attractions

Gold Mining Heritage: Omeo is renowned for its gold mining history, visible in sites like the Oriental Claims Historic Area-the highest alluvial gold field in Australia and the Cassilis Historic Area, once among the richest goldfields in the state.

Museums and Galleries: The Omeo Historic Park and Museum showcases artefacts and stories from the region's pioneering days, while the Great Alpine Gallery in nearby Swifts Creek displays local art.

Townscape: Omeo's town centre is noted for its historic buildings and scenic hilltop vistas along Day Avenue, with panoramic views of the Victorian Alps and the surrounding countryside.

Nature and Outdoor Activities

National Parks and Alpine Scenery: Omeo is a gateway to the Alpine National Park, Victoria's largest, offering hiking, wildlife viewing, and spectacular alpine landscapes. The nearby Mount Hotham and Dinner Plain resorts provide skiing, snowboarding, cross-country trails, and summer bushwalking or cycling.

Mountain Biking and Pump Track: Omeo boasts a world-class pump and skills track, suitable for all levels, and is developing extensive mountain bike trails that are accessible year-round.

Adventure Sports: The region is known for whitewater rafting on the Mitta Mitta River, with over 60 rapids through the Mitta Gorge, as well as opportunities for fishing, horse riding, and four-wheel driving on tracks like the Knocker Track.

Lookouts and Scenic Drives: The Kosciuszko Lookout offers sweeping views of the Alps. The Wine and Gold Drive and other scenic routes take visitors through historic sites and picturesque landscapes.

Events and Experiences

Annual Events: Omeo hosts events such as the Cattlemen 100 MTB race, the Hinnomunjie Picnic Races and Victoria's Highest Show, which has been running since 1885.

Golf and Camping: The Omeo Golf Club welcomes visitors, and the town offers spacious campgrounds beside Livingstone Creek, ideal for caravans and RVs. The Tambo Valley Golf Club is a renowned country course.

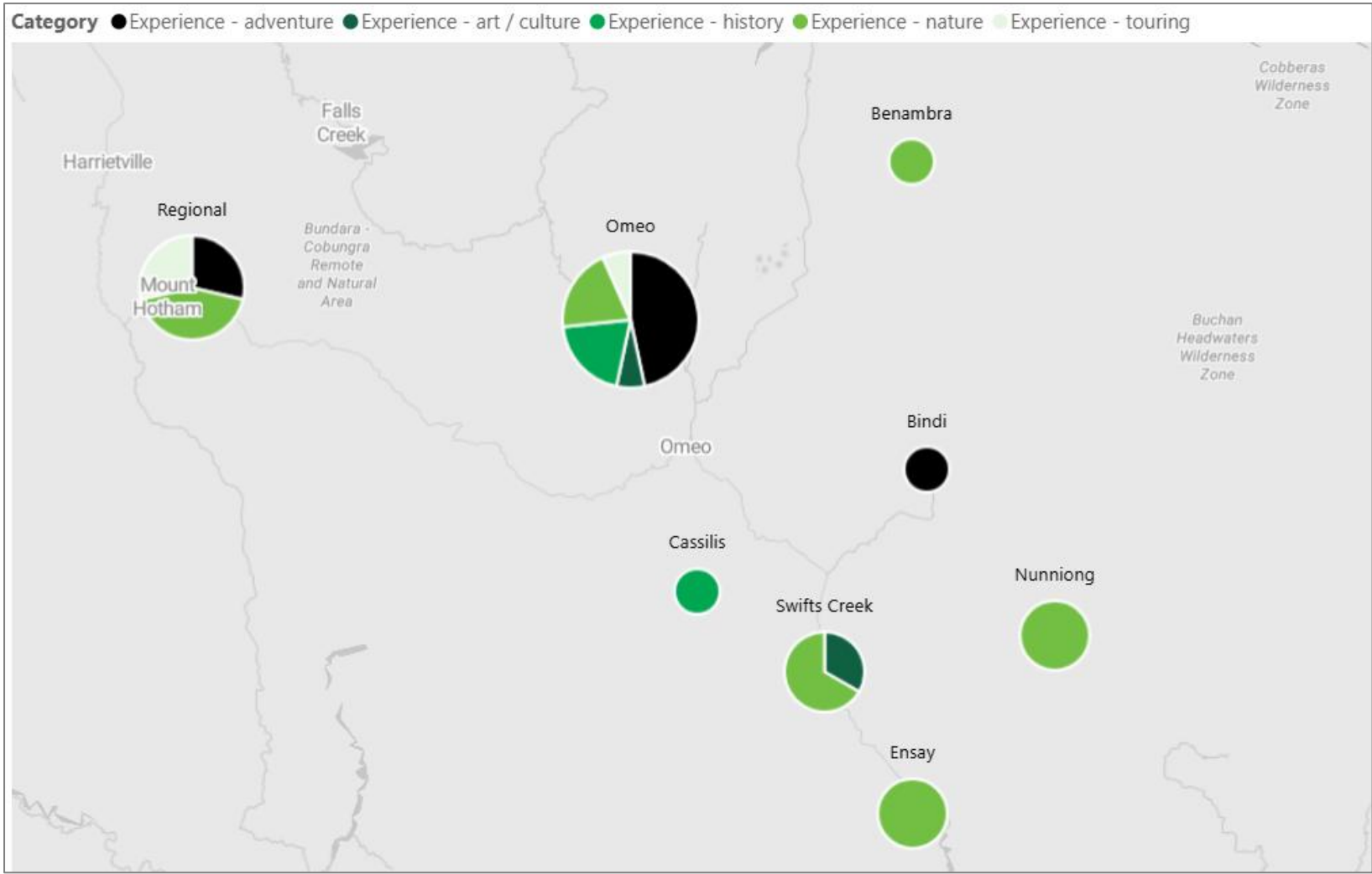
Local Food and Drink: local hospitality at cafes, bakeries, and pubs, Cassilis Estate Wine and Cider for tastings in the Cassilis Valley.

Nearby Regional Attractions

Benambra, Angler's Rest, and Ensay: Each nearby town has its own character and stories

Dinner Plain and Mount Hotham: Both alpine villages are within an hour's drive, offering snow sports in winter and hiking or biking in summer.

Figure 5. Experiences in the Region



Source: TRC Tourism / Nova Economics. June 2025.

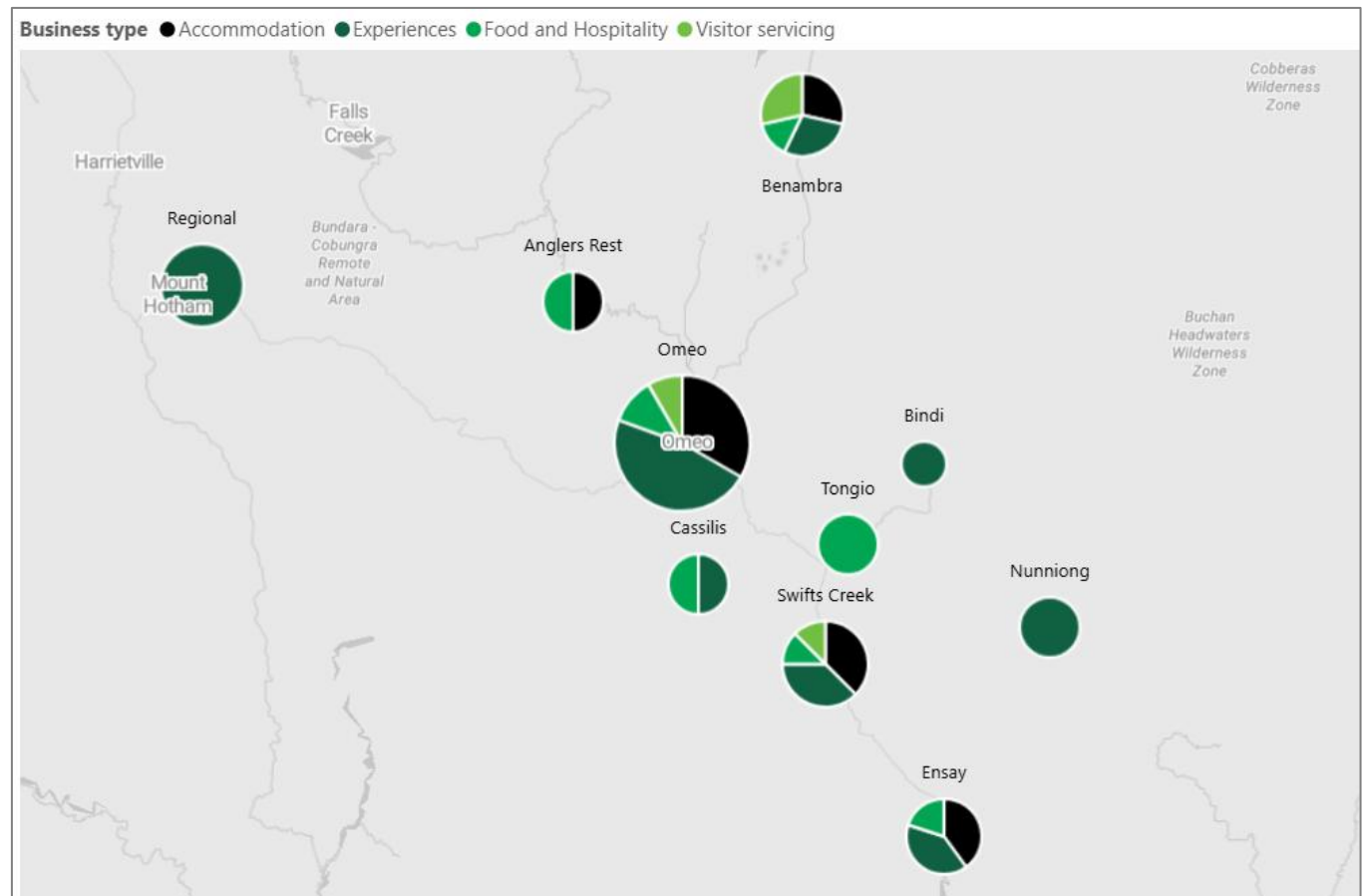
Visitor Servicing

Some other relevant statistics of the existing tourism infrastructure include:

- Several businesses serve visitor needs including supermarkets at Swifts Creek and Omeo, service stations at Omeo and Swifts Creek, Post offices, visitor information services in Omeo and the Benambra Neighbourhood House
- Food and hospitality venues (10 listed) include bakeries cafes (including the Benambra Post Office and Café) winery at Cassilis and an Olive Oil producer in Nullamunjie
- One brewery / brew house in Omeo.

Businesses in the region have a relatively modest off season. Advice in the sector received is that the snow season from June to September provides a strong component of annual turnover, in addition to the summer touring season – generally from Cup Weekend in November through to late April / early May.

Figure 6. Heatmap Showing the Number of Businesses by Location Within the Broader Region



Source: TRC / Nova Economics June 2025.

3 What Will Attract Visitors to Omeo?

3.1 Tourism Markets

Omeo and region are poised to become an important nature and adventure-based destination in Victoria's High Country. The region offers a unique blend of heritage, alpine scenery, and outdoor experiences that complement the broader Gippsland tourism offering.

The Gippsland Destination Management Plan⁶, states that, *'as expectations and demand for high quality visitor experiences increase, and competition from existing and new destinations continues to grow, Gippsland requires a new strategic and coordinated approach to realise this forecast growth. The challenge is to maximise the region's proximity to Melbourne, create high value experiences that encourage new visitors to travel to the region, extend their length of stay, build shoulder season opportunities and explore what the region has to offer throughout the year.'*

To ensure long term growth in visitor yield and numbers, it is important that products and services appeal to existing markets and continue to evolve to meet their needs to encourage repeat visitation and dispersal around the region.

Omeo is well positioned to attract the domestic overnight visitor:

- Trail-based adventure seekers (mountain bikers, 4WD enthusiasts, backcountry hikers)
- Nature lovers and families looking for authentic, uncrowded outdoor experiences
- Road-trippers travelling the Great Alpine Road
- Heritage and cultural visitors interested in High Country history and storytelling
- Event goers attending regional gatherings.

The following table shows the markets identified in the Gippsland Destination Management Plan that are most likely to apply to Omeo.

⁶ <https://assets.visitgippsland.com.au/documents/Gippsland-DMP-Final-Report-26082019-1.pdf>

Table 2. Omeo and Region – Target Markets

DOMESTIC OVERNIGHT – INC. THE ACTIVE FAMILY MARKET	DOMESTIC OVERNIGHT – INC. 55+ TOURING MARKET
✓	✓
This is the most significant market for the region. This market needs refreshed and new products to grow. The mountain bike market and adventure seekers fits into this category.	It is important to maintain the 55+ market by continuing to offer experiences, services and facilities that meet their needs. This market is active and most likely to travel outside of peak times, includes heritage and cultural visitors

Demand drivers for Omeo and region are included in the table below. The information is sourced from the Gippsland Destination Management Plan.

Table 3. Product and Market Matching

GENERAL TOURISM PRODUCT AND EXPERIENCES DEMAND DRIVERS	DOMESTIC OVERNIGHT MARKET - INC. THE ACTIVE FAMILY	DOMESTIC OVERNIGHT MARKET - INC. 55+ TOURING
Agritourism		
First Nations	✓	✓
Nature and Adventure	✓	✓
Heritage and Culture	✓	✓
Creative Industries		
Food and Wine	✓	✓
Special Interest (sports, fishing etc)	✓	✓
Events/Festivals	✓	✓
Scenic touring routes – strategic location and regional links	✓	✓

Source: Gippsland Destination Management Plan – Towards 2030.

Based on the demand drivers - visitor markets are looking for quality accommodation, great local food, and visitor servicing when and where they need it.

Table 4. What Visitors Want

CATEGORY	WHAT VISITORS WANT	APPLIES TO
 Accommodation	<ul style="list-style-type: none">• High-quality, comfortable lodging• Family-friendly stays (cabins, cottages, glamping)• Boutique or character-rich options (heritage-style or immersive)• Affordable and mid-range options• Accessible accommodation for older travellers (ground floor, no stairs, easy access)	Active families, 55+ touring market
 Food and Dining	<ul style="list-style-type: none">• Local produce and regional flavours• Cafes, bakeries, wineries, and breweries• Dining with a view or immersive setting• Child-friendly and accessible food outlets	All markets
 Visitor Servicing	<ul style="list-style-type: none">• Clear, up-to-date information pre- and post-arrival• Welcoming visitor information centres• Helpful signage and interpretive displays• Facilities such as EV charging, toilets, picnic areas• Gear hire (bikes, ski, etc.)• Trail maps, mobile apps, digital guides	All markets
 Experience Add-ons	<ul style="list-style-type: none">• Packaged experiences (e.g. food + bike hire + accommodation)• Local events, markets, farmgate visits• Cultural storytelling and Indigenous-led experiences	Especially return and shoulder-season markets

Source: Gippsland Destination Management Plan.

Positioning mountain biking as an anchor demand driver

The mountain biking market represents a critical opportunity for Omeo and the surrounding region to stimulate year-round visitation, diversify its tourism base, and drive sustainable economic growth. As a fast-growing adventure tourism segment, mountain biking attracts high-yield visitors who often travel in groups or with families, stay multiple nights, and seek complementary experiences such as local dining, cultural attractions, and nature-based activities.

By positioning mountain biking as an anchor market, Omeo can establish a steady stream of active travellers that supports the viability of existing businesses, encourages new investment in accommodation and visitor services, and creates flow-on demand across other segments - such as food and wine, events, and heritage tourism. This market has the potential to activate the shoulder seasons, build local employment, and serve as a catalyst for revitalising the visitor economy across the broader region.

3.2 Mountain Bike Markets

Understanding what attracts mountain bikers in all their forms to a destination is critical to the provision of a complete experience for this market.

Omeo and region already has a significant visitor economy. With growth in the touring market being demonstrated in the visitor numbers, focussing on the new MTB market will provide the greatest upside leverage of the investment in the mountain bike park and facilities in Omeo.

Primarily, the trails at Omeo including the setting, design and construction will anecdotally position the Mountain Bike Park among the best in Australia.

Further, Figure 7 provides the evidence that the market is growing and continues to grow in response to an increase in supply of great trail destinations. Improved technology (e-bikes) and a better understanding of making a destination that is market aligned (Derby in Tasmania for example).

Australian riders are well-travelled and compare destinations nationally and globally, raising expectations for design, service, and sustainability.

Over the past 15 years mountain biking has experienced significant growth evolving into a more inclusive and diverse activity with a focus on sustainability, community engagement and trail accessibility. Advances in bike technology, including dual suspension and the rise of electric mountain bikes (e-MTBs), have expanded participation, making the sport more accessible to riders of all skill levels.

The rise of organised events, bike parks, and tourism around mountain biking has also contributed to its growing popularity, boosting its economic and cultural impact on destinations worldwide.

Appendix A contains several mountain bike case benchmarking studies highlighting how Omeo and surrounds can position itself as a sustainable, community-led and high-quality Australian mountain bike destination.

Figure 7. Mountain Biking Participation Increases



Sources for figure7: Auscycling, TRA NVS/IVS, Ausplay, Kinetica, Bicycle Industries Australia

While there are multiple ways of segmenting the market for riders and visitors using the Omeo MTB park, the descriptions for the proposed markets in the following table provide a strong introduction to the likely users as well as the time they are likely to be able to spend in the Omeo region.

Table 5. Target MTB Market Segments for Omeo and Region⁷

USER TYPE	DESCRIPTION
Local Trail Users	<ul style="list-style-type: none"> Those people who live locally and ride a mountain bike. They can be of varying skill level but are generally beyond the beginner level. They may live in the region, have children and families, or be part of a smaller group of friends that seek social adventures. They may ride the proposed Omeo MTB Park on average 5 to 6 times a year and also seek out opportunities beyond Omeo. They will not require accommodation, but will utilise bike shops, cafes, transport and services.
Day Visitors – Regional Trail Users	<ul style="list-style-type: none"> Generally, these are visitors coming from as far afield as Bairnsdale, and Orbost in Gippsland, and Bright and Mount Beauty in the North East of the State. They will be generally moderately proficient riders and may travel to a strong destination such as planned for Omeo twice a year. They will also generally travel as a couple or a group of friends and ride for the day. They will not require accommodation in Omeo and Region but will utilise cafes. Transport services such as petrol stations, cafes and bike servicing and parts as required.
Adventure Holidays	<ul style="list-style-type: none"> This market is predominantly based on those people coming specifically to Omeo region for an adventure holiday. The holiday may consist of mountain biking intermixed with a range of other activities including horse riding, fishing, rafting, skiing, walking etc. The stay is likely to be longer than one night and the people are likely to travel as a group or family. This market will grow in time as the development of the trails and associated facilities aids the growth of other products and services in the region. This market will seek accommodation, possibly self-contained, and will use a full range of services in the town including cafes, supermarkets, restaurants, bike repairs and parts, shuttles and will seek packaged tours with other providers – or undertake these experiences as free independent travellers.
Travel Through	<ul style="list-style-type: none"> This market comprises those that are travelling the Great Alpine Road and passing through, that decide to spend another night on the road and stay in Omeo or surrounds based on the trail destination and their desire to have a ride. The likely skill level of this group will range from beginner through to lower level advanced. It is likely that they will only ride the trails once (one day) and spend one extra night before moving on to another experience in another location. This segment will require hire bikes, shuttle services, possibly safety clothing as well as cafes, restaurants, transport services
Core Mountain Bikers	<ul style="list-style-type: none"> This market is self-evident and includes those serious mountain bikers who will travel with expensive and comprehensive equipment to destinations for riding opportunities. The likely stay will be 2 to 3 nights, and they would generally spend 2 days riding the trails. Accommodation and cafes. Restaurants, bike parts and repairs etc will be required.
Events	<ul style="list-style-type: none"> Events are an important market for Omeo and one to be pursued as they provide exposure to the destination, as well as bring in large numbers of riders and as well as support staff and friends and family. Full range of services is required for events and organisers.

Source: Omeo Mountain Bike Destination Business Case. 2021

⁷ Omeo Mountain Bike Destination Business Case, November 2021

4 Stakeholder Insights

4.1 Introduction and Summary

A comprehensive survey of existing businesses and other community members and groups has been undertaken as part of this roadmap and prospectus report. The survey was undertaken over a period of 4 weeks from 7 May 2025 to June 2025. The survey has been augmented by face to face consultation, drop in sessions and online meetings with various groups and stakeholders.

The survey focused on understanding the business landscape, workforce challenges, tourism drivers, commercial opportunities, growth and investment outlook, and support needs in the Omeo and Region.

A total of **63 participants responded to the survey**, providing valuable insights into the current state and future prospects of the tourism ecosystem in the Omeo and Region.

The results of the survey and the consultation have provided a valuable snapshot into the current aspirations, opportunities and issues that the existing businesses in the region face.

Business Landscape

43% of respondents currently operate a business in the region, while 33% plan to open a business within the next 12 months. Most businesses are in accommodation, hospitality, retail, and agriculture sectors. Omeo is the primary business location, followed by Benambra and Swifts Creek.

Workforce Challenges

Recruitment and retention of skilled staff is a significant issue. Training access and skills gaps are recurring concerns. Some businesses, particularly in agriculture, report no impact from these challenges.

Tourism Drivers

Top visitor attractions identified include mountain bike trails, natural landscapes, adventure activities (rafting, 4WDing, horse riding), proximity to snowfields, and cultural heritage and local events).

Omeo Mountain Bike Destination Project

Over 60% of respondents are familiar with the Omeo Mountain Bike Destination Project. The majority believe it will positively impact their business, though concerns exist about infrastructure readiness and service capacity.

Commercial Opportunities

Top commercial opportunities identified include accommodation, food & beverage services, shuttle services, guided tours, and bike hire.

Growth and Investment Outlook

73% of respondents expect steady to rapid growth over the next 3–10 years, with 59% having plans for future investment. Key drivers include anticipated visitation, customer demand, and funding access.

Support Needs

The most requested business support includes destination marketing, funding/investment access, infrastructure upgrades, business development support, and workforce training.

Notable Comments and Suggestions

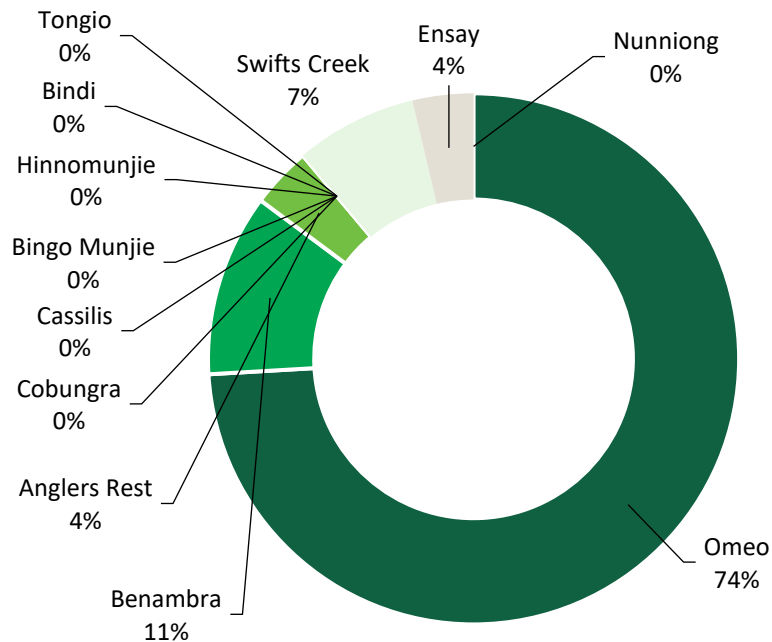
Respondents highlighted the need for inclusivity by broadening the 'Omeo Region' label to better reflect surrounding towns. Housing shortages, infrastructure gaps, environmental concerns, and opportunities to link MTB tourism with local heritage and arts were also noted.

4.2 Business Type and Location

When asked if survey respondents were planning to open a business, 27 respondents (43%) indicated that were currently operating a business and 7 (11%) indicated that they planned to open one.

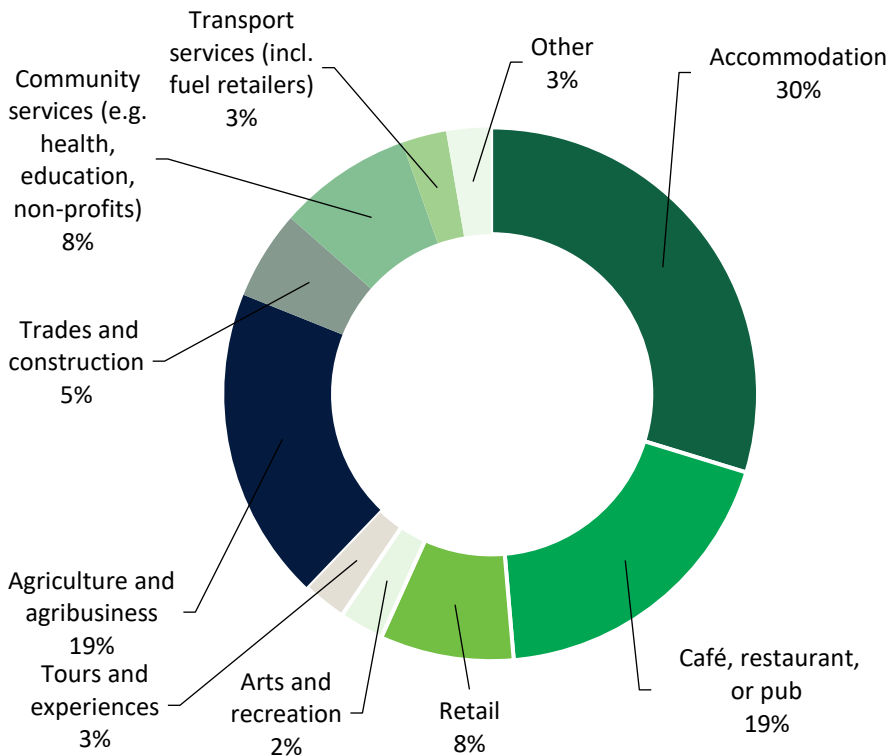
- Most businesses are in accommodation, hospitality, retail and agricultural sectors.
- Omeo is the primary business location of respondents followed by Benambra and Swifts Creek (Figure 8).

Figure 8. Respondents Business Locations



Source: TRC Tourism / Nova Economics. June 2025 (n=27)

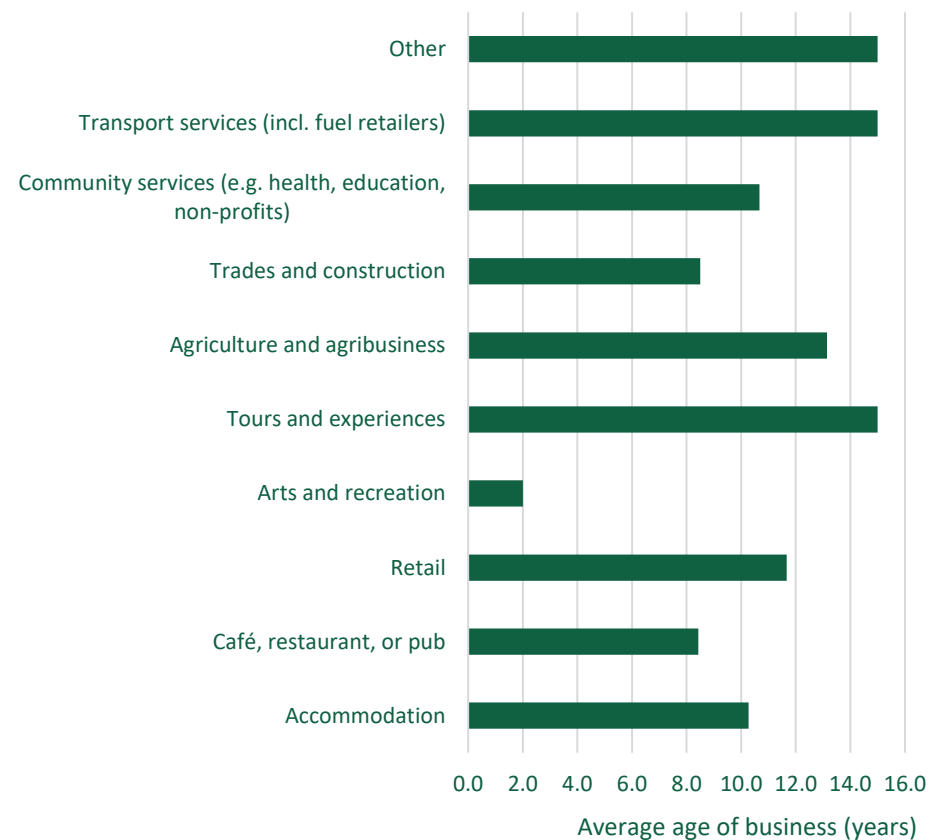
Figure 9. Business Respondents Business Type



Source: TRC Tourism / Nova Economics. June 2025

Of all businesses responding to the survey, the average age of the business was 10.4 years while those servicing the visitor economy were slightly younger at 10 years (Figure10).

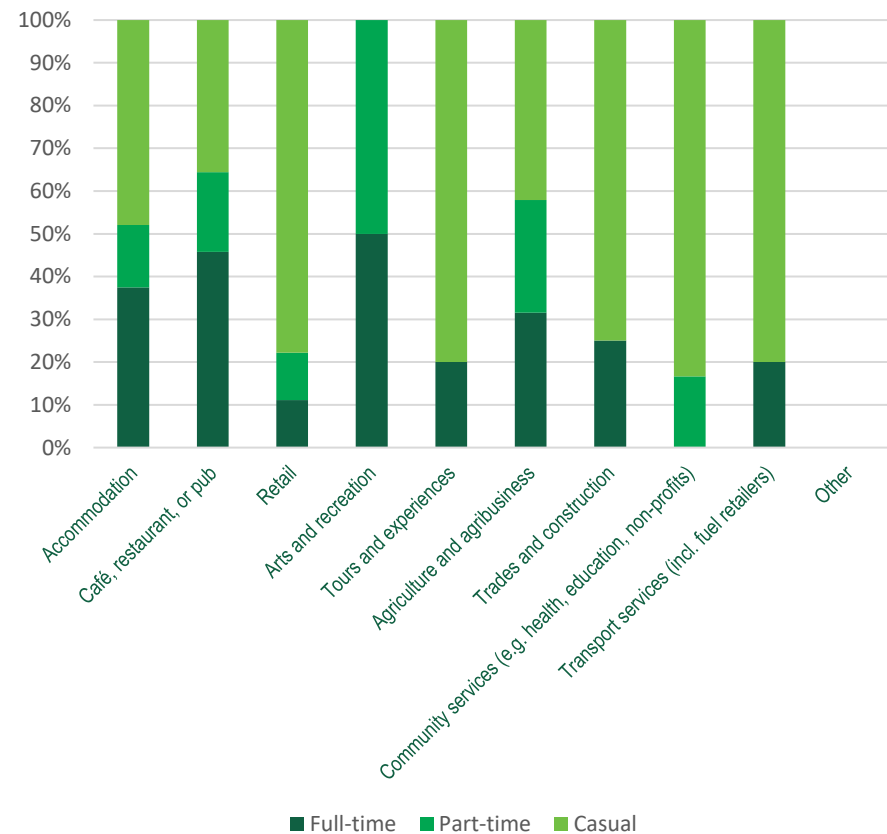
Figure 10. Average Age of Businesses in the Omeo and Region



Source: TRC Tourism / Nova Economics. June 2025

The businesses in the region are a significant contributor to employment. As with many visitor economy businesses in seasonal regions, casual labour is important, as is a solid base of full time staff (Figure 11).

Figure 11. Chart Showing the Breakdown of Employment Types by Business Type of Survey Respondents



Source: TRC Tourism / Nova Economics. June 2025

Of those businesses currently operating in the Omeo and Region, the majority are aware of the Omeo Mountain Bike Park and that it will be a hero attraction for the region.

Table 6. No. Business Respondents Aware or Otherwise - Omeo MTB Park

RESPONSE	NO.
Very familiar	19
Somewhat familiar	13
Neutral	1
Somewhat unfamiliar	1
Not at all familiar	0
% familiar	94%

Source: TRC Tourism / Nova Economics. June 2025

Figure 12. Identification of the Main Visitor Attractions in Omeo and District



Source: TRC Tourism / Nova Economics. June 2025

4.3 Omeo Mountain Bike Park

When asked whether or not the Omeo Mountain Bike Park will positively impact their business the majority of respondents agreed or strongly agreed. The following tables present the data for both all businesses that responded to the survey, and those that identified as visitor economy businesses. Those businesses in the visitor economy think the Omeo Mountain Bike Park will have a stronger positive impact than those more general visitors.

Table 7. All Business Perceptions of the Positive Impact of the Omeo Mountain Bike Park

Planned and operating businesses	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	% Agree
The Omeo Mountain Bike Park will positively impact my business	3	2	8	13	8	62%
My business is prepared to accommodate the anticipated visitor uplift from the Omeo Mountain Bike Trail Project	3	3	7	14	7	62%
Omeo Region has experienced increased visitation over the past year	0	1	6	19	8	79%
Regional visitation supports the sustainability of my business	2	1	9	12	10	65%
There are sufficient services and infrastructure in the region to support visitor needs	10	13	8	2	1	9%

Source: TRC Tourism / Nova Economics. June 2025

Table 8. Visitor Economy Aligned Business Perceptions of the Positive Impact of the Omeo Mountain Bike Park

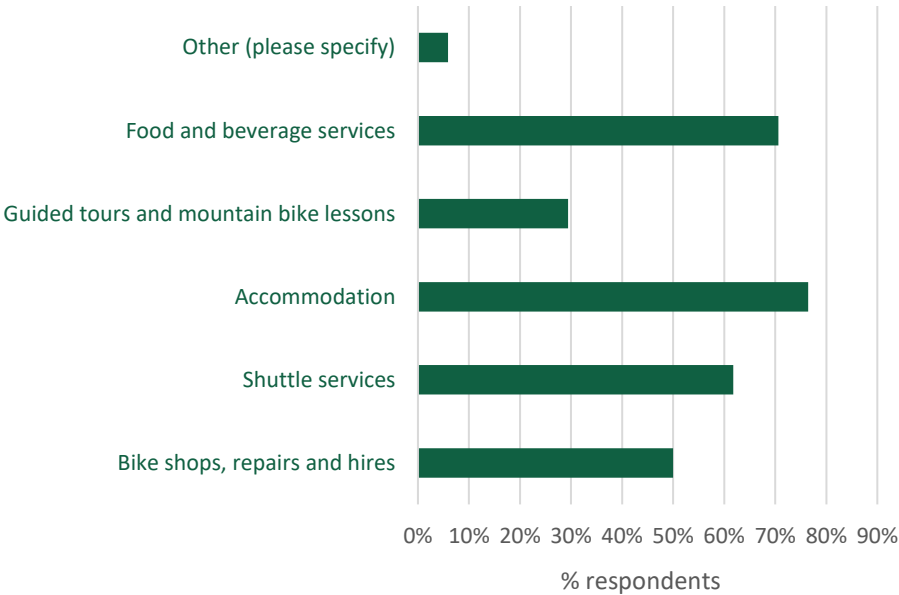
Tourism businesses (planned and operating)	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	% Agree
The Omeo Mountain Bike Park will positively impact my business	3	1	4	16	9	76%
My business is prepared to accommodate the anticipated visitor uplift from the Omeo Mountain Bike Trail Project	3	3	5	15	7	67%
Omeo and Region has experienced increased visitation over the past year	0	0	8	21	4	76%
Regional visitation supports the sustainability of my business	0	1	8	12	12	73%
There are sufficient services and infrastructure in the region to support visitor needs	8	12	13	0	0	0%

Source: TRC Tourism / Nova Economics. June 2025

Businesses were then asked what the top 3 commercial opportunities were likely to evolve as a result of the Omeo Mountain Bike Park.

Figure 13 shows that the respondents felt that the provision of additional accommodation is the biggest commercial opportunity closely followed by food and beverage services and shuttle services.

Figure 13. Commercial Opportunities associated with the Omeo Mountain Bike Park



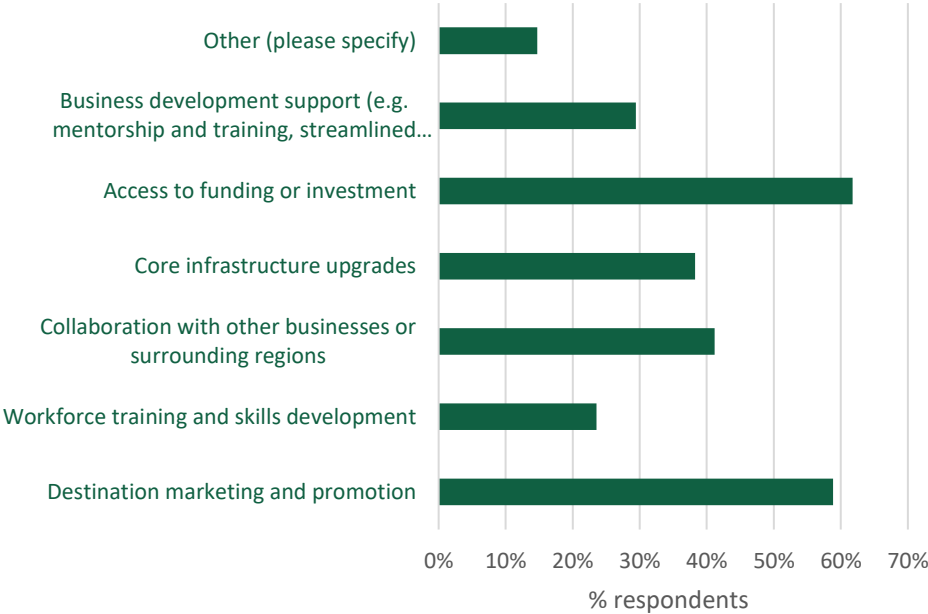
Source: TRC Tourism / Nova Economics. June 2025

Investment

Importantly, businesses were asked what would be the resources or support that help your business capitalise on the Omeo Mountain Bike Park. These answers are also referenced in the road map in the following sections.

Responses ranked highest were access to funding or investment, and destination marketing and promotion.

Figure 14. Support Required for Businesses Capitalise on the Omeo Mountain Bike Park



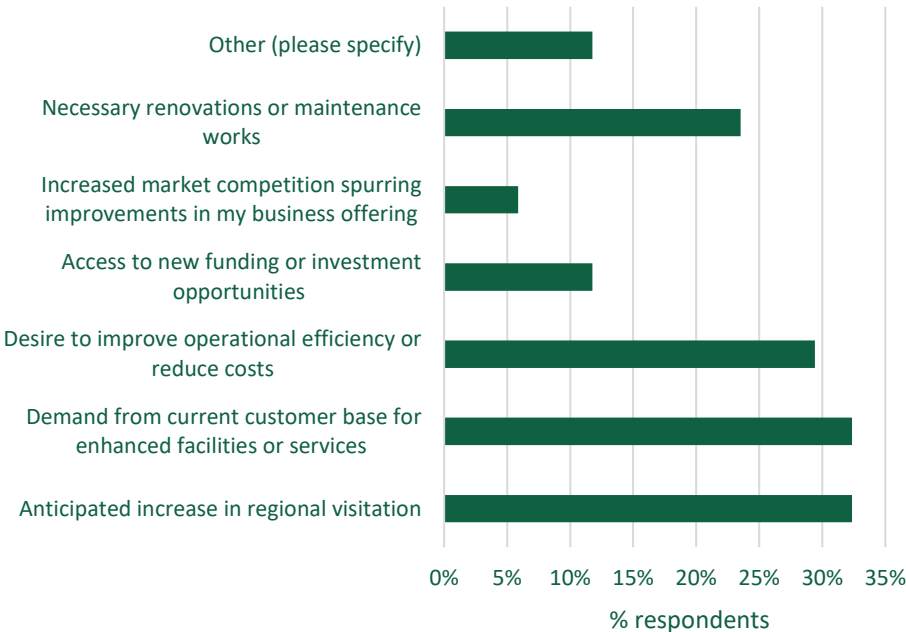
Source: TRC Tourism / Nova Economics. June 2025

Of the planned and operating businesses, the majority (71%) have plans for investment.

The following chart provides the primary driver or reason for the planned investment or development in the business.

Clearly businesses are seeing the increase in demand from the current customers and visitors to the region for improved services and facilities, as well as anticipating an increase in visitors to the region most likely due to the mountain bike park.

Figure 15. The Primary Driver or Reason for Investment



Source: TRC Tourism / Nova Economics. June 2025

Staff

Respondents provided some insightful information into the recruitment and retention of skilled staff. The majority of respondents reported significant or severe challenges in recruiting and retaining staff. The table below shows the challenges in recruiting and retaining staff for all businesses in the Omeo and Region.

Table 9. Challenges in Recruiting and Retaining Staff – All Businesses

Challenges in Recruiting and Retaining Staff - All Business	No impact	Minimal impact	Moderate impact	Significant impact	Severe impact	% of responses reporting significant or severe impacts
Difficulty in recruiting staff for available roles	9	2	5	9	2	41%
Challenges in retaining skilled employees	10	6	5	5	1	22%
Skills gaps within the local workforce	6	6	8	5	2	26%
Competition with other businesses for skilled labour	10	4	9	3	1	15%
Limited access to training or professional development opportunities for staff	6	4	11	4	2	22%

Source: TRC Tourism / Nova Economics. June 2025. Note rounding may produce addition errors.

Table 10. Challenges in Recruiting and Retaining Staff - Visitor Economy Related Business

Tourism Related Businesses	No impact	Minimal impact	Moderate impact	Significant impact	Severe impact	% of responses significant or severe impacts
Difficulty in recruiting staff for available roles	11	0	1	10	2	50%
Challenges in retaining skilled employees	11	4	2	6	1	29%
Skills gaps within the local workforce	9	5	4	5	1	25%
Competition with other businesses for skilled labour	11	1	8	3	1	17%
Limited access to training or professional development opportunities for staff	7	2	9	4	2	25%

In summary, businesses associated with the visitor economy faced greater issues in recruiting and retaining skilled staff than other businesses in the region. This could be related to the service sector nature of the jobs (i.e. potentially lower paid jobs in cleaning, front of house etc), lower job security and seasonality of the work.

Source: TRC Tourism / Nova Economics. June 2025. Note rounding may produce addition errors.

5 What is Required

5.1 Summary

Omeo and region’s visitor economy is relatively healthy now. The Mountain Bike Park will provide a supply constraint due to increased demand for services. With visitors forecast to increase by close to 20,000pa by year 10 of trail operations⁸, there remains not only a commercial and visitor servicing opportunity, but an imperative to capitalise on the investment made into the mountain bike trails for the town to reach its full visitor economy potential.

The survey undertaken by TRC Tourism for this report shows that 52 out of 63 respondents understand that the mountain bike trails will be Omeo’s most significant attraction for visitors.

Having an increase in visitors to the region to use the mountain bike park, will also require additional visitor infrastructure, services and staff to capitalise on that demand.

Having acknowledged that the Omeo bike trails will provide that opportunity, only just under half the respondents agreed that their business was prepared to accommodate the additional visitors.

It is also worth noting that in some respects, the existing accommodation stock reflects the touring nature of many visitors passing through on their Great Alpine Road journey. The Mountain Bike Park is expected to provide a significant reason for many to stay.

Appendix B contains the full list of TRC researched accommodation, servicing, events, and experience for the region.

⁸ Business Case – Omeo Mountain Bike Destination. 2019/2021. TRC Tourism for East Gippsland Shire.

5.2 Accommodation

The survey undertaken by TRC Tourism and Nova Economics indicated that accommodation was the top commercial opportunity to be realised in the region as a result of the mountain bike trails investment. 46 out of 63 respondents acknowledged this and it was closely followed by food and beverage services.

It is difficult in this plan to accurately define the short fall of rooms that will exist when the trail is fully operational.

Current Stock

The following is an estimate of the number of rooms available for accommodation now across the region:

Table 11. Current Rooms by Location within the Omeo Region

LOCATION	AVAILABLE ROOMS
Omeo	74 (with additional 100+ camp sites)
Benambra	7
Swifts Creek	5 (with additional 20+ campsites)
Ensay	2
Anglers Rest	8

Source: TRC Research and Estimates. This estimate is based on desktop research and should not be relied upon as 100% accurate.

In this estimate, only rooms are listed. No assessment of the quality of the rooms has been made in this report as it is outside scope.

There is no doubt that some of this current stock would be less suitable than others to the market.

Owners planning to upgrade their accommodation will make their own assessment as to the preferred type – but the following section provides some assessments on the attributes that some riders seek.

Mid-market 3 to 4 star but clean and inviting provides the sweet spot in the market where visitors can move slightly up or down the price and quality chain.

It is also worth noting that the mountain bike market is broad (see earlier chapters), and groups of young men will have different needs to families and groups of older riders who seek a different experience.

The type of markets likely to be attracted to the region is outlined in the November 2021 re-issue of the Omeo Mountain Bike Destination Business Case.⁹

Ideal Accommodation

As mountain biking is likely to be the main driver for increased demand of services, it is the focus of the following discussion.

It is assumed that local riders (those riders from within the Omeo and surrounds) will not require accommodation to ride the trails. Those from within the broader East Gippsland may require some accommodation but are also happy to ride for day trips. The majority of the need will come from those seeking to either travel through Omeo and ride while on an existing holiday, or those seeking out the mountain bike park and its world class trails.

Mountain bikers cover a wide variety of markets and a wide spectrum of incomes. In short, particularly for the first several years where demand is likely to exceed supply, anyone who can cater towards mountain biking will have a competitive advantage.

Some attributes for successful rider accommodation:

- Partially self-catering and comfortable – in the 3 to 4 star range is ideal
- Close to the trails allowing ride in and rode out, or accessing the shuttle service
- Quirky and sense of fun, and aligned to the ‘high country’ theme that Omeo and the region sits within

- Contains bike cleaning and lock up facilities, bike repair facilities, as well as lithium ion battery charging facilities for e-bikes
- Ideally, the accommodation provider is able to speak with riders about their experience, offer suggestions, help with visitor servicing needs and assist with repairs
- Close to good coffee, beer, beverages and restaurants and cafes.

Regional Accommodation Supply

- Swifts Creek and Benambra are both towns located nearby to Omeo and form part of the Omeo region (for the purposes of this report). Further afield, Cobungra, Dinner Plain and Anglers Rest also have accommodation supply. Dinner Plain has significant reserves of rooms and can play an important role in the stock of rooms for visitors and staff alike. To look to Dinner Plain for the shortfall in the longer term is to not capitalise on the potential benefits to Omeo and East Gippsland of the investment.
- Bright and Bairnsdale have some accommodation that can be used to offset the increase in demand for accommodation in Omeo in the short term - although the ideal location for accommodation is in Omeo, Swifts Creek and Benambra close to the Mountain Bike Park.
- Accommodation supply in these towns and other locations nearby (96 rooms and 120 campsites) forms an important regional position whereby the intent of the mountain bike park is to provide benefits beyond Omeo.
- Improved and increased accommodation supply at Swifts Creek, Benambra, and Ensay is constrained by the lack of waste water services, with the towns using septic systems and advice received during consultation that the likelihood of town wide systems is low. Some thought could be put into micro-systems in Swifts Creek where demand would appear to be higher for additional accommodation that Benambra and Ensay for any proposed developments there that may be market led.
- Benambra is also an important part of the region. The Benambra Hotel contains a number of rooms that can be configured into backpacker style

⁹ Omeo Mountain Bike Destination Business Case December 2019 reissued November 2021.

rooms, single occupancy and twin occupancy rooms. Meals are served Tuesday to Sunday.

- Any increase in demand for rooms at Benambra will help the local hotel be more sustainable and offer meals and other services 7 days per week during peak riding season.

Accommodation Demand Increase

The business case undertaken for the Omeo mountain bike park in 2019 and 2021, provides a modelled estimate of the increase in demand for accommodation.

The forecasting is expected to be moderately conservative.

The following table provides the expected increase in accommodation demand for Omeo and region from the bike park investment in year 4 of operations.

Table 12. Increase in overnight visitor numbers – Omeo Mountain Bike Park Derived – Assumed Year 4 Trail Operations

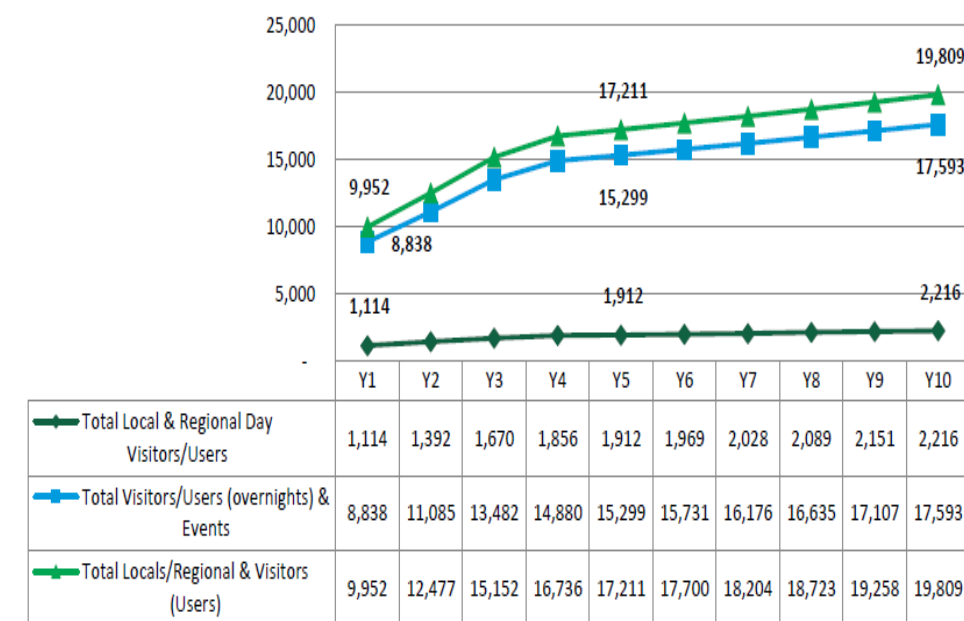
Overnight Visitors / Users	% Using trails	Trail users (no.)	Ave rides (no.)	Trail uses (no.)
Adventure Holiday (assumed 40% of overnight visitors using the trail)		5,952	2 per visit	11,904
Travelling through visitors (assumed 20% of visitors ride the trail)		2,976	1 per visit	2,927
Core mountain bikers (assumed 40% of overnight visitors using the trail)		5,952	2 per visit	11,904
TOTAL Overnight Visitors		14,880		26,784

Source: Business Case Omeo Mountain Bike Destination 2019/2021 for East Gippsland Shire. TRC Tourism. Note numbers do not include day visitors who do not add to overnight demand.

The above projections assume that the current accommodation stock does not dampen demand, and that by year 4 of trail operations – there are enough rooms and accommodation that it is not an inhibitor to demand.

The following figure provides the estimated trail users for Omeo Mountain Bike Destination (Years 1 through 10)

Figure 16. Estimated trail users for Omeo Mountain Bike Park (Years 1 to 10)



Source: MCA modelling and estimates 2019

Shortfall

To estimate the number of rooms this requires, and assuming the existing occupancy rate remains static – we divide the demand per person by 2 (average room occupancy) giving 7,440 additional room nights required.

If we assume this demand will occur through 6 months of the year (assumption) – this gives a relatively conservative room shortfall of derived demand for accommodation of 40 rooms (twin share).

This shortfall in supply could be partially taken up by increasing room occupancy rates of the existing stock and utilising rooms in Benambra and even some stock at Swifts Creek. Even by allowing an increase in occupancy across the 6 busiest months, and assuming some demand is taken up regionally – at least 20 to 30 additional rooms are required to meet the forecast visitor increase due to mountain bike demand.¹⁰



¹⁰ Note – this estimate is provided to illustrate the shortfall in supply of rooms. Investors seeking to invest in accommodation should undertake their own demand and supply forecast as part of their investment case.

5.3 Product and Service Gaps

To support the bike parks' anticipated 17,500 visitors in year 10 of operation, a number of services would ideally support the visitors and work towards increasing visitor experiences.

These might include food and beverage offerings such as café's coffee, beer and other beverages, retail, bike shops and parts, transport services, and other market led services.

Food and Beverage

Omeo currently has 2 hotels that serve meals – for the most part 7 days a week: The Hilltop Hotel and the Golden Age Hotel. In addition, the town has several cafes, a bakery, a brewery and a supermarket.

Nearby Swifts Creek has a hotel (serving meals for events and Tuesday to Sunday evenings) as well as being open Saturday and public holidays for lunch.

Benambra Hotel serves meals for events (such as bike club rides) and from Tuesday to Sunday evenings.

Further afield, the Blue Duck Hotel located at Anglers Rest (approximately 30 minutes north east of Omeo on the Omeo Highway) as well as offering cabin accommodation, offers meals for lunch from Friday to Sunday and evening meals on Friday and Saturday.

Dinner Plain has a number of eating establishments that include the Dinner Plain Hotel. They serve meals 7 days a week.

The charming Little River Hotel at Ensay opens and serves meals although it is quite some distance from Omeo and there is a lack of commercial accommodation nearby.

Food and Beverage Demand

The demand for food and beverage will increase. In a similar way to accommodation, an additional 14,880 visitors will spend a night in Omeo and a further 1,856 visitors will travel to Omeo as a day visit to ride the mountain bike park.¹¹

It is difficult to understand the capacity in the region for meals, and in the survey,¹² it was not highlighted as a significant concern. Only 1 respondent indicated that they were considering opening a café, restaurant or pub (this does not indicate the importance or otherwise in that response).

44 out of 63 respondents to the survey did indicate that the services in the region were insufficient to cater for the increase in demand.

This study concludes that the market will assess the need for food and beverage and respond relatively quickly. Existing providers in the short term can meet the demand shortfall although visitors coming to the region to ride should not be left without the ability to have a meal.

Longer term, demand would most likely support an increase in supply of operators, and an increase in the scale and potentially variety of the existing operators.

Further, increase in demand would have the dual benefit of making the existing operations more financially sustainable assuming that staff can be found.

The roadmap section of this report deals with staffing.

Visitor Servicing

Visitor servicing is a broad term that generally implies how well visitors feel their needs for basic services such as information, signs, toilets, etc have been met.

The recent Omeo streetscape works have gone some way to improving the flow of people and vehicles through Omeo. Livingstone Park and the car park on the western edge of town provide the obvious places to make hubs for mountain

bike visitors. Ease of parking during busy times will likely decrease due to an increase in visitor numbers with cars.

The current visitor centre is staffed during business hours. Adding online visitor information through the Visit Omeo website can alleviate the need for a 7 day a week visitor centre. Meeting the information needs of visitors can be achieved through improved signage, online information and better utilisation of the visitor centre – perhaps in future through the Omeo Justice Precinct outcomes (work in progress at the time of this report's preparation).

5.4 Experiences

The Gippsland Destination Management Plan (DMP) – Towards 2030¹³ among other initiatives proposes a series of hero and supporting experiences for Gippsland that if developed, will help drive interest in the region and attract the target market to visit and spend in the region. These collectively form the strategic priority number 3 – to Develop Gippsland's experiences to encourage new and existing markets to visit, stay and spend.

To support this growth, a number of hero and supporting experiences are listed under 5 themes:

1. World Class Natural Sanctuary
2. Rivers and Coastal Paradise
3. Paddock and Ocean Produce
4. Inspired Adventure
5. Vibrant Local Communities

¹¹ Omeo Mountain Bike Destination Business Case December 2019 / November 2021.

¹² Survey of Businesses in the Omeo Region to identify investment opportunities and constraints in investing.

¹³ Towards 2030. Gippsland Destination Management Plan. A Blueprint for Growth

Omeo and Region has several directly relevant listed experiences (supporting):

Omeo Adventure Hub

This project will see Omeo develop as a nationally recognised alpine and high-country adventure hub. The centre piece will be the Omeo Mountain Bike Hub feeding directly into the town centre. Additional features will include potential to fish, horse ride, raft and do other adventure activities aligned to the high country theme.

The impending completion of the mountain bike park will provide the hero from which other experiences can support the development of the ‘adventure hub.’

The current Visit Omeo website¹⁴ lists a range of activities and experiences that can be undertaken in the region. The main experiences include:

- **Walking in Oriental Claims** – a gold rush era Historic Reserve managed by Parks Victoria
- **Big River Fishing and Outdoors** – a local Omeo business that provides equipment and runs fishing tours and tuition
- **Tambo Valley and Omeo Golf Courses** – high country charming golf courses worthy of a stop for visitors
- **Velo Grammont** – a bike touring, equipment and service shop in Omeo
- **Rafting Australia** – a company based locally in Hinnomunjie that operates white water rafting trips on the Mitta Mitta River.

The essence of the adventure hub has been created. In the following sections, we make recommendations on how to better activate this hub.

Development and marketing of these experiences is required (plus more aligned products and experiences) to ensure the potential meets the market aspirations.

Swifts Creek

The Swifts Creek Nature Based Tourism Study¹⁵ completed in 2025 by TRC Tourism contains a number of recommendations on ways in which Swifts Creek can carve out a niche in adventure touring, cycling, heritage tourism and creative eco-experiences.

The market and cross over for gravel road cycling and back road touring is large Australia wide. Swifts Creek has an opportunity to capitalise on this market and cross over with mountain bike riders. Implementing the report will provide the product to support demand.

Swifts Creek does however lack commercial accommodation and the report lists a number of opportunities including eco-cabins, tiny houses and enhanced camping facilities allowing more visitors to stay in the region. This in turn will aid the Albion Hotel and other providers to remain open during the week.

Touring

The Great Alpine Road is listed as one of Victoria’s and Australia’s great drives on *visitvictoria.com*. The touring route starts in Bairnsdale in the south and travels to Wangaratta in Victoria’s north-east (or vice versa).

A revamp of the story telling, perhaps including an app for travellers would help the experience for people undertaking this breathtaking road trip. Omeo and Swifts Creek are very placed as service towns on the route and provide features for travellers wishing to stop.

The bakeries in Omeo and Swifts Creek could become the High Country duo – a must stop for people to stop and sample the best pies in the east (as an example of cooperative marketing).

¹⁴ [Visitomeo.com.au/visit-category/things-to-do](https://www.visitomeo.com.au/visit-category/things-to-do)

¹⁵ Swifts Creek Nature Based Tourism Study. 2025. TRC Tourism

Events

A number of popular events that are aligned to the experience themes exist in the region. The *visitomeo* website list many of these – including the Omeo and Region Show, the Alpine Rally and the Rodeo in Omeo.

Events are a great way of increasing demand for a region or destination, particularly in the shoulder and off seasons.

A regional events calendar that is supported by the Omeo and Region Business and Tourism Association, and East Gippsland Shire could help attract events to the region.

It is acknowledged that human resources to develop, run and market events are required and that many people in the region are extremely busy operating businesses, and volunteering on several local communities boards or committees.

Equine Tourism

A DRAFT pre-feasibility study has been undertaken by SMA for East Gippsland Shire Council exploring the potential types and opportunities of equine tourism in the high country.¹⁶

The study tests five experiences with a sample of Melbourne residents that had undertaken a nature based tourism experience in the past 3 years.

Respondents preferred camping (supported) over other types of accommodation.

The two highest results (experiences) were mountain cattlemen and brumby immersion and guided brumby spotting / tracking. This suggests the experiences are based on low infrastructure / high immersion and storytelling attributes. Interest in developing these businesses would appear to be real although some support and industry development programs could help potential operators. The businesses suggested fit with the Adventure Hub concept.

¹⁶ Pre-Feasibility Study to develop a High-Country Brumby Tourism Experience for East Gippsland Shire Council, April 2025. SMA Tourism

Making Gippsland Australia's Preferred 4WD Adventure Region

Gippsland has a natural advantage in Victoria and more broadly in Australia with the Australian Alps and foothills providing the perfect terrain, landscape and setting for responsible 4WD adventures, outdoor activities including remote camping, driving, touring and associated activities such as walking.

Partnering with 4 WD Victoria and activating Victoria's Iconic 4WD Adventures¹⁷ will provide a greater level of impetus on the natural advantage of Omeo. Positioned within reach of 3 of these drives, and with multiple self-drive routes available, and with the servicing required to safely access the region, Omeo has much to offer.

Marketing the role Omeo can play in this experience area is lacking and partnering with Parks Victoria and 4WD Victoria would assist.

Experience Gaps

Omeo and Swifts Creek and the broader region have a lot of experiences on offer. Many of them are led by small micro businesses that may operate seasonally.

Further – adding events to the mix and the touring routes that exist, mean that there is a lot on offer. The difficulty appears to be the access to those experiences for travellers. This can imply lack of suitable accommodation, eateries, information available to travellers, or a perception in the market place that these experience do not exist.

Further experience growth can and should occur in line with the direction of the DMP for Gippsland. Operators should be supported in working through the processes of developing businesses and growing experiences by the East Gippsland Shire Council and Destination Gippsland.

¹⁷ 4wdvictoria.org.au/iconic4wd/

Infrastructure

Consultation undertaken to develop this roadmap and prospectus, and previous reports highlighted a number of infrastructure gaps in the region.

These include:

WASTE WATER TREATMENT IN SWIFTS CREEK

Swifts Creek, Benambra and Ensley rely on septic systems and is potentially holding back investment in accommodation in Swifts Creek. It should be noted that some micro systems are available on the market, but these add complexity and potentially costs to the business in a time where capital can easily go to places where these services exist.

OMELO JUSTICE PRECINCT

This precinct has enormous potential to provide a commercial and social hub for community and residents alike. It is acknowledged that East Gippsland Shire are considering how to take this forward and are currently investigating a plan for the precinct.

PARKING

The mountain bike park will create demand for parking in addition to the current demand. It is recognised that the recent streetscape works in Omeo have enhanced the feel of the town.

Long vehicle parking most small destinations is a critical element for growth.

The western car park can serve as the ideal shuttle pick up service for mountain bikes, and in peak demand, further parking needs to be explored.

SIGNS AND INTERPRETATION

Given so much of Omeo and region's visitation occurs through touring routes, reviewing the effectiveness of the existing storytelling, interpretation and product 'feel' for the routes is considered important.

5.5 Barriers to Investment

The survey, interviews, data and TRC Tourism's general understanding of the visitor economy has highlighted several perceived or real barriers to investment. These barriers are discussed further in detail in the investment roadmap section, and include the following:

WORKFORCE AND HOUSING CONSTRAINTS

- A shortage of skilled hospitality and tourism workers.
- A shortage of commercial or residential land on which to build new houses and commercial facilities
- Difficulty attracting and retaining staff due to limited local housing supply, particularly for short-term and seasonal workers.

LACK OF COMMERCIAL TOURISM SERVICES

- Gaps in shuttle operations, bike hire, guiding, and food and beverage services diminish the overall visitor experience and reduce the economic return.

INFRASTRUCTURE AND AMENITY GAPS

- Insufficient trail-connected infrastructure (e.g. changerooms, seating, signage, digital visitor tools).
- Waste water disposal systems in the regional towns including Swifts Creek, Benambra and Ensley.
- Limited availability of bike-friendly accommodation or visitor-focused amenities like gear storage and maintenance areas.

CONNECTIVITY AND ACCESSIBILITY

- Remote location of Omeo (over 5 hours from Melbourne) with limited public transport options reduces ease of access.
- Poor connections between surrounding towns and the mountain bike park reduce opportunities for regional dispersal and overnight stays.

GOVERNANCE AND COORDINATION CHALLENGES

- Absence of a clear governance framework or lead agency to drive MTB-focused tourism development and trail maintenance.
- Fragmented stakeholder roles across public and private sectors hinder coordinated delivery of investment priorities.

DIGITAL AND MARKETING LIMITATIONS

- Low visibility of the destination in key tourism channels and platforms.
- Underdeveloped online trip planning and promotional tools reduce awareness and limit pre-trip decision-making.

ECONOMIC CONDITIONS AND RISK PERCEPTION

- Perception of high investment risk due to small population base, seasonal demand, and the early-stage maturity of the MTB tourism product.
- Limited access to capital for local operators and small-scale entrepreneurs.

COMMUNITY READINESS

- Capacity constraints within local businesses to expand or diversify offerings.
- Need for support and mentoring for emerging tourism ventures.

5.6 Omeo Futures Report

The report Maximising Future Outcomes for the Omeo Region¹⁸ was prepared for the East Gippsland Shire Council in 2020 as part of the resilient futures program run by the State Government.

Many similar themes have emerged during this report preparation as were targeted and considered in the action plan. Based on themes:

1. A shared Omeo region vision, brand and strategic direction that reflects the community, landscape and history

2. A coordinated approach to community engagement and building community governance and leadership
3. Evidence based integrated project planning and investment
4. An enabling environment for growth, and
5. Liveable places for existing and new community members.

The report goes on to list a range of existing and new projects, many of which are relevant to this roadmap, many of which are more in line with community liveability (which has an indirect impact on the experiences visitors have to a town and region).

Adoption of the recommendations in this plan is outside the scope of this report, but many of the actions relate to and feed into the roadmap contained in this report.

5.7 Understanding How Omeo Performs for the New MTB Market Preferences

A world-class trail alone does not make a destination. It is the combination of high-quality trails and an exceptional visitor experience that creates a mountain bike destination that residents value and visitors actively seek out. The characteristics of what makes a great trail destination are benchmarked against Omeo and compared to Blue Derby (TAS) in the below table.

This benchmarking provides insights into a high performing destination based on mountain bike tourism, and Omeo and region in its current state. The comparison is for the purposes of understanding action in the roadmap that can implemented to close gaps between the current state and a high performing destination.

¹⁸ Mosaic Insights 2020. Maximising future outcomes for the Omeo region.

Table 13. Benchmark Case study – Comparing World’s Best Practice Criteria to both Blue Derby (TAS) and Omeo

CRITERIA: WORLD BEST PRACTICE		DERBY (TAS) RIDEBLUEDERBY.COM.AU/	OME0 (VIC) VISITOME0.COM.AU/RIDE/
Strong brand alignment and imagery	Globally recognised brand with consistent, professional imagery across platforms and aligned with destination identity	Well-established 'Blue Derby' brand with global recognition	Emerging brand, gaining visibility through Destination Gippsland, Visit Omeo and Mountain Bike websites. Ride Omeo and Visit Omeo are the preferred brands.
Appeals to domestic and international markets	Attracts a wide range of international and domestic riders; included in global MTB circuit/tourism rankings	Attracts both domestic and international riders; hosted Enduro World Series (2023) events	Currently appeals mainly to domestic markets, building broader reach. Unlikely to attract a significant international market in the early days but can significantly grow its domestic visitation.
High quality nature and cultural interpretation	Immersive nature and cultural storytelling through interpretation panels, digital tools, and First Nations partnerships	Rich rainforest setting with historic mining features; interpretive signage present	Historic landscape limited interpretive signage currently. Sits within Victoria’s magnificent high country.
Environmental sustainability and cultural stewardship	Certified environmental and cultural sustainability standards (e.g. IMBA, EarthCheck), with visible stewardship programs	Maintained by Blue Derby Foundation with clear conservation focus	Designed sustainably by Common Ground Trails; early-stage stewardship. Maintenance is underwritten by East Gippsland Shire. East Gippsland Shire is an accredited eco-tourism destination – the first LGA in Victoria.
Climate-resilient infrastructure	Purpose-built, all-weather trails with climate-resilient surfacing and infrastructure (e.g., drainage, erosion control)	Durable trails built to international standards	Well-drained, year-round riding conditions; good base infrastructure, trails constructed to IMBA standards
Structured and regular maintenance program	Dedicated trail crew with scheduled maintenance, seasonal checks, and community volunteer programs	Regular maintenance by dedicated foundation and contractors	Maintenance by local government and contractors; scalable approach
Accessible information (pre/post trip)	Seamless digital and physical visitor info (apps, interactive maps, trail alerts, multi-language support)	Extensive website, maps, signage, mobile-ready resources	Trailforks listed, Visit Gippsland and Visit Omeo online info; local signage improving. Not yet formally open.
Accessibility to a range of markets	Design caters to families, youth, seniors, adaptive riders; clear gradings and safe progression zones	Beginner to expert trails; family services and e-bike friendly	Green to black trails, skills area, pump track; e-bike accessible

CRITERIA: WORLD BEST PRACTICE		DERBY (TAS) RIDEBLUEDERBY.COM.AU/	OME0 (VIC) VISITOME0.COM.AU/RIDE/
Connection to local communities	Integrated tourism model with local town; trailhead connected to services, accommodation,	Derby community built around MTB economy; full service support	Integrated with Omeo town; cafes, pubs, services nearby
Commercial operators	Multiple operators offering shuttles, coaching, repairs, tours; certified and quality assured	Multiple operators (Vertigo, MAD) for hire, shuttles, coaching	Some emerging operators: commercial activity still growing
Revenue/yield generation	Measured economic impact; tiered pricing, memberships, event revenues, local business spend data	Strong ROI; visitor spending key to local economy. Accommodation bookings made through the Derby website directly contribute to funding trail maintenance crew / trails	Early economic returns noted; more data post-establishment needed
Event capability	Regularly hosts national championships, UCI events, or stage races; facilities for spectators, media, logistics	Hosted multiple UCI/EWS events	Designed for high-level national/state events; future UCI potential
Wayfinding and signage (incl. digital)	Multi-format signage (onsite, digital, QR code linked); multilingual, weatherproof, IMBA-compliant	Clear, attractive signage and interactive tools	Basic signage in place; digital Trailforks integration used. Brand and images required.
Good governance	Independent governance body or trust managing funding, planning, operations, community engagement	Blue Derby Foundation oversees planning, maintenance and events	Governed by East Gippsland Shire with community partners
Number and length of trails	Network exceeding 100 km; includes loops, technical zones, progression tracks, with trail count transparency	Over 125 km of trails across 35+ individual trails	Approx. 52 km open (as of 2024), targeting 100+ km with future stages
Distance from major population centres	Within 1-2 hrs of international or major regional airport, supported by good roads and public transport	1 hr 30 mins from Launceston (regional airport)	5.5 hrs from Melbourne by car, 2 hrs from Bairnsdale (V/Line rail link), approximately 6 hours from Canberra
Current trail infrastructure	Trailhead hub with shelters, toilets, showers, secure bike storage, wash stations, repair points, parking	World-class infrastructure: signage, trailhead, shuttles, services	Pump track, skills park, trailhead amenities; infrastructure scaling with demand

Source: TRC Tourism. June 2025

Based on the benchmark table (Table 10), and also on the rider preferences discussed in section three of this report, the following gap analysis is presented and provides one of the elements in driving the roadmap in the next section of this report.

Omeo's Mountain Bike Park is emerging as a promising destination but still requires targeted improvements to compete with leading trail centres like Blue Derby in Tasmania.

Areas for enhancement include:

BRAND DEVELOPMENT

Omeo's MTB brand is still gaining recognition. A more cohesive and professionally presented identity -aligned across websites, signage and promotional materials is needed to build visibility both domestically and internationally.

INTERPRETATION AND STORYTELLING

Unlike Derby, which offers immersive environmental and cultural interpretation, Omeo currently has limited signage or storytelling features. Strengthening nature and heritage interpretation, especially through First Nations stories, would significantly elevate the experience.

TRAIL INFRASTRUCTURE AND AMENITIES:

While Omeo offers good base facilities like a skills park and pump track, it lacks the scale and refinement of Derby's fully developed trailhead hub. Investing in high-quality infrastructure such as shelters, bike wash stations, repair stations, and weatherproof signage will improve the rider experience.

COMMERCIAL SERVICES AND EVENTS

Omeo has only a few emerging commercial operators. Growing a network of shuttles, coaching and future guiding services, as well as attracting signature events would stimulate the local economy and enhance destination appeal.

CONNECTIVITY AND YIELD

Omeo's remoteness is a challenge compared to Derby's proximity to Launceston. Strategies to improve access, increase overnight stays, and capture spending (e.g. via integrated accommodation-booking platforms or trail memberships) are critical.

SEAMLESS INFORMATION ACCESS

From planning to riding to post-trip sharing, today's riders demand easily accessible information -including digital maps (e.g. Trailforks), trail statuses, safety alerts, and trip planning tools. Clear trail grading and real-time updates are expected as standard. We acknowledge that Omeo is not yet formally open, but this will need to be factored in.

5.8 Lessons from Destinations

A number of lessons can be learned from other destinations who have had significant investment in services and infrastructure to support experience growth and demand.

These are summarised below.

Private Sector Led

Destinations such as Derby in Tasmania (often held up as the poster child for remote area mountain bike based visitor economy growth and success) did not start as a must do destination. The initial investment if done to a high standard that reflects the terrain, and culture of the region creates a private sector opportunity that the sector will respond to. Mountain biking is fast becoming a main stream product therefor being less risky for investors that it was 10 or 15 years ago.

This report aims to assist the sector in seeing Omeo as an opportunity, but ultimately the investment of private capital must be undertaken at the investor level with an understanding of the risk.

Derby in Tasmania started as a series of well-made mountain bike trails and a local hotel with a resident population that was sceptical on the benefits of the trails. Omeo starts in front of that proposition although competition continues with the development of other trail parks including Warburton in Victoria.

Strong Governance

Strong governance is vital to any destination succeeding and providing some certainty to the private sector on decision making and the sustainability of the destination. Governance implies well maintained tracks, a voice at the table for investors on directions for the destination, revenue opportunities, packaging branding and marketing are all critical for increasing demand, and a view to ensuring supply of services is aligned to the market expectations (or exceeding them).

East Gippsland Shire has taken a strong lead in this area and is likely to be a factor in ensuring success. Derby is similar where the Councils have underwritten the governance and investment in operations and seen a significant regional increase in economic activity as a result of that investment.

Vision and Leadership

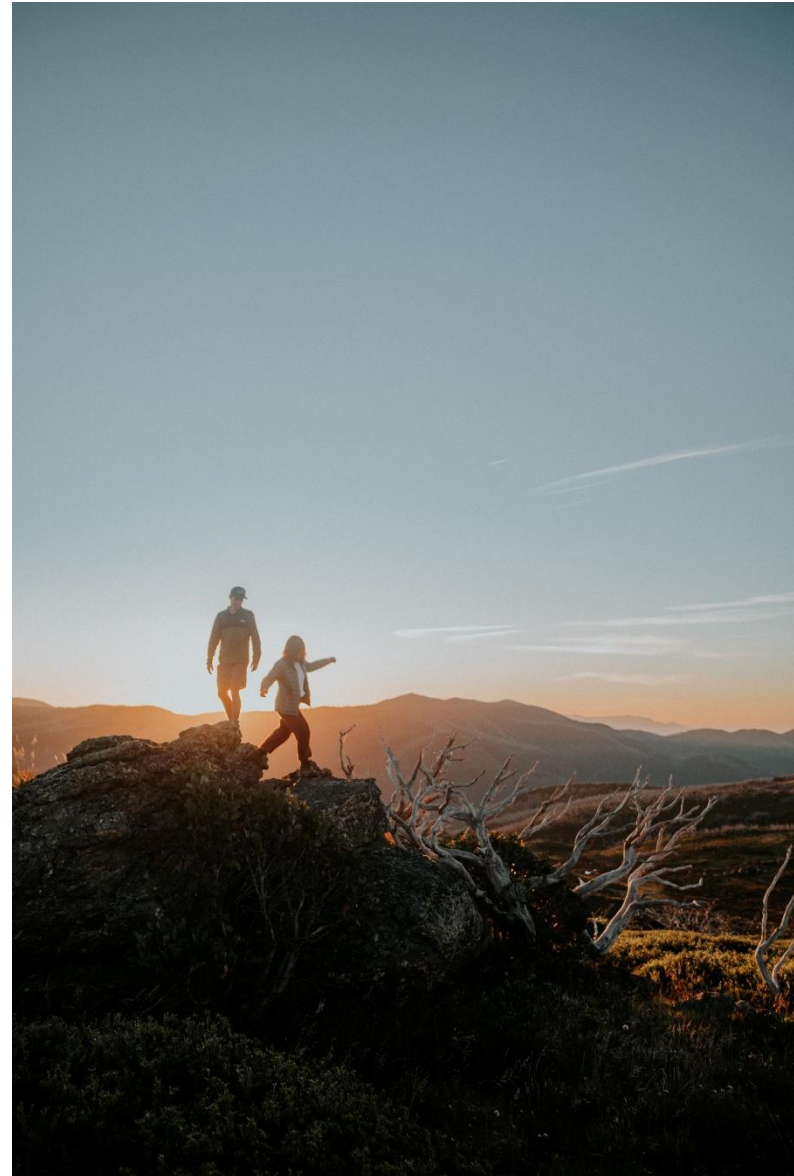
Aligned to Derby and to the impending Warburton, leadership and vision is critical (and aligned with the previous Governance section).

Derby and other successful MTB destinations had strong leadership and a vision to create something special.

We see Omeo as having the potential for that X factor. It will require leadership across not only Council, but the community as well. One concern is that like most small communities, Omeo and the broader region has a capacity issue with community leaders being volunteers in many of the broader community functions such as fire brigades, school councils etc.

Incentives

Many successful destination's LGAs may provide incentives for appropriate development, This can be in the form of fee relief for permits and applications, business concierge services. Other forms of incentives could also be considered for investing in services and assets that support a growing destination including rate considerations, infrastructure provision (i.e. power, water etc), ATDW listing, reducing and derisking approvals processes and various other forms of incentive. These can send signals to investors that a region is 'open for business' and is something East Gippsland Shire could consider.



6 Visitor Economy Investment Roadmap

Unlocking the potential of the Omeo Region for investment based on the Omeo Mountain Bike Park asset and opportunity will take time, business confidence, good governance and the right leadership and programs.

There is no doubt that the bike park will attract a range of visitors previously not attracted to Omeo. Ensuring the visitor leaves with a positive experience will in part depend on how the private sector, supported by enabling government policies and processes respond.

The timeframe of the opening of the bike park suggests that it is likely that the initial wave of visitors, in many respects similar to that of Derby when the trails

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opened, will find services and accommodation limited. Responding to the increase in demand as quickly as possible will help the region capitalize on the opportunity before it.

There is no magic bullet to providing the best possible environment for business to succeed. Rather a series of actions and elements can help provide the right environment for business investment.

This section provides a series of actions defined by the following categories.

Further, a summary table of the roadmap is contained following the detailed recommendations.

TIMEFRAME:	IMPACT	TYPE
<p>The following suggested timeframe descriptors can be applied to each action, or group of actions.</p> <p>Short Term – work can and should start now given the impending opening of the park in late 2025</p> <p>Medium Term – the initiative can wait for one or two years while the immediate actions are undertaken. Planning can commence sooner as resources allow</p> <p>Longer Term – work can commence within 3 to 5 years – but outcomes will be achieved earlier if the planning commences, or the initiative commences earlier.</p> <p>These proposed timeframes are a guide only and as resources allow, initiatives can start as soon as practically possible.</p>	<p>The following suggested impact statements can be applied to each suggested action of theme in the roadmap.</p> <p>High – highly impactful in reducing barriers to investment or in encouraging investment</p> <p>Moderate – has some impact in reducing barriers to investment or in encouraging investment</p> <p>Low – has minimal impact in reducing barriers or in encouraging investment</p>	<p>The following three categories are used to define the action type.</p> <p>Action – the recommendation can be directly actioned by the partners to this plan.</p> <p>Influence – the accountability lies outside the accountability of the partners to this report, but they can seek to influence the outcome.</p> <p>Partner – the accountability will involve a partnership approach.</p> <p>The roadmap is presented in a summary format at the end of this section, each of the actions is defined by a goal and presented in a table</p>



6.1 Roadmap in Detail

Governance and Leadership

Table 14. ROADMAP - Governance and Leadership Actions

DRIVER	ACTION	DESCRIPTION	OUTCOME	TIME FRAME	IMPACT	ACTION TYPE
Strong destination governance and leadership underpins many of the reasons destinations do not perform to their potential or succeed in their stated vision. This was highlighted in the Action Plan completed in 2020 ¹⁹ that provides a pathway to maximising future outcomes for the Omeo region. Omeo Region Business and Tourism Association (ORBTA) is a small volunteer led organisation that has limited resources. The Mountain Bike Park will provide a driver for growth. A shared vision and improved governance arrangements will assist destination growth and coordinated leadership	G1	<p>Establish a governance group comprised of Council staff (MTB Park staff, Eco Dev, Omeo based customer service staff) and ORBTA to drive outcomes and assist with decision making</p> <p>ORBTA is a volunteer run organisation. Having them implement actions in this plan will be difficult from a capacity perspective.</p>	<p>A reviewed and fit for purpose governance structure with the capacity and skills to partner with and lead industry and government.</p> <p>Implementing a range of initiatives including those listed in this report require capacity and skills.</p>	<p>Short Term</p> <p>Many of the actions in this roadmap require leadership and capacity</p>	<p>Potentially High</p> <p>Council staff from the relevant areas of Council work collaboratively with ORBTA to deliver outcomes for the region.</p> <p>ORBTA is able to continue to deliver the services it is accountable to its members for.</p>	<p>Action and Partnership</p> <p>EG Shire in partnership with ORBTA.</p>
	G2	<p>Organise famils/events featuring external experts in destination management and seek growth for regional businesses.</p> <p>It appears from consultation that this rarely occurs. Industry partnerships and a destination approach will aid performance.</p>	<p>The collaboration between business, government, and community is essential for delivering a seamless experience to visitors in destinations with limited capacity.</p>	<p>Short - Medium Term</p> <p>May require the capacity boost recommended -G1 to proceed</p>	<p>Medium</p> <p>Builds a sense of one destination working together to provide outstanding visitor services.</p>	<p>Action</p> <p>East Gippsland Shire and ORBTA.</p>
	G3	<p>Data is critical for informed business investment and growth decisions.</p> <p>Improve the flow of market based data to businesses through ORBTA and the EG Shire.</p>	<p>Businesses and the community will have useful data about markets, visitors, experiences, etc., so they can make smart choices.</p>	<p>Short - Medium Term</p> <p>May require the capacity boost identified in G1</p>	<p>Medium</p> <p>Some businesses will have customer data for their operation – but this is aimed at sector wide data on how the destination is performing.</p>	<p>Action</p> <p>ORBTA, East Gippsland Shire in partnerships with DGL.</p>

¹⁹ Maximising Future Outcomes for the Omeo Region. Mosaic Insights for East Gippsland Shire Council. 2020



Housing Development

Table 15. ROADMAP - Housing Development Actions

DRIVER	ACTION	DESCRIPTION	OUTCOME	TIME FRAME	IMPACT	ACTION TYPE
Fundamental to the successful attraction, recruitment and retention of staff in a remote location like Omeo, Benambra, Swifts Creek and other towns is the ability to house workers, managers and business owners. Consultation with businesses and the outcomes of the survey all point to a lack of suitable rental housing and even houses for purchase across the broader region.	H1	Undertake a social housing investment strategy and action plan. The plan should include options for smaller dwellings, relocatable homes, repurposing existing buildings that may not be fit for purpose and utilising existing properties that may be empty.	An innovative plan that drives both private and public sector investment in social and staff housing for the workers that will be required to service the new businesses and expanded businesses.	Short to Medium Term Other destinations Australia wide are trying to understand how to deliver this outcome – learnings from them can assist.	High The strategy itself will not produce the housing to reduce the shortfall but the actions from it if practical and implementable may.	Action East Gippsland Shire can lead this piece of work with business investment support.
	H2	Undertake a review of the land zoning in Omeo through the impending Structure Plan review. With a view of freeing up land for residential and commercial development and providing for traffic flow etc..	Some land within the township by not fault other than history is zoned rural and not available for housing or commercial development. Proceed with the Structure Plan review scheduled for 2025 through the East Gippsland Shire that will also look at traffic flows etc.	Short to Long Term Changes to planning zones take time and a process, but if not started, it will remain a barrier.	Potentially High Assuming the review is undertaken, and some land is rezoned – it would provide an incentive for construction and supply of suitable houses and potentially commercial development.	Action East Gippsland Shire can begin this dependent upon Council and resources.
	H3	Shared housing between State Government departments. During the consultation, it was disclosed that state government-owned houses are not accessible to other government agencies or hospital staff. Arrange for vacant government houses to be rented to other agencies.	State government housing is available for some departmental staff. We understand that these are from time to time vacant and could be used by staff from other government departments, or even business such as the hospital. Greater utilisation of the existing stock could be the result.	Short to Long Term Seek to understand the issues with each Department and put in place an agreement.	Medium It may or may not be possible depending on rules within each bureaucracy.	Partnership Seek to partner with the Shire and State Government Departments.



Staff Recruitment and Retention

Table 16. ROADMAP – Staff Recruitment and Retention Actions

DRIVER	ACTION	DESCRIPTION	OUTCOME	TIME FRAME	IMPACT	ACTION TYPE
The business survey undertaken as part of this plan indicated that 50% of visitor economy based businesses in the region had significant or severe impacts in recruiting and retaining staff. For those in the accommodation sector, it was as high as 100%. Aligned to this was a lack of skills applicable to the role (25%) and the limited access to training for staff in the sector (25%). This problem is exacerbated by the lack of suitable and available housing identified in the section above.	S1	Develop a formal partnership with a training provider (s) on behalf of the entire destination to provide staff training. Including various aspects such as customer service, RSA certification, barista skills, and coffee making. Businesses and some staff feel that the location means a lower level of staff training opportunities without the expense of sending them to Bairnsdale.	Staff feel more empowered and provide an improved level of service.	Immediate	Medium to High	Action ORBTA and East Gippsland Shire can action directly with EG Tafe or another provider.
	S2	Investigate how more backpackers and overseas people working on temporary visas can work in Omeo and District. It is understood that the remote area category that allows for some visa types does not apply to Omeo and region. If this is the case, lobbying for change can assist the supply of casual and seasonal staff,	More temporary and seasonal workers can live and work in Omeo. The Bike Park will also provide an impetus for younger people to want to visit and work in the region.	Immediate	Medium This approach can address the needs of seasonal and short-term workers. In numerous remote regions, such workers are used to supplement permanent staff.	Influence If visa types fall outside the Omeo region, the Member for East Gippsland should seek boundary changes through the Federal Government.
	S3	Create a staff attraction prospectus outlining the benefits of living and working in the high country. Ancillary services are important when a family or partner is considering whether to move and invest in Omeo and Region. This includes the available schooling, transport, connectivity (internet), health services, nearby experiences and recreation opportunities. Use case studies as appropriate.	Skilled and unskilled potential employees may not have realised the beauty and opportunities of living and working in the region. Promotes a positive community approach.	Medium Term	Medium Most people would do due diligence before they moved to a remote location.	Action East Gippsland Shire and ORBTA can jointly action this prospectus.

	S4	Seasonal Workforce Sharing. Dinner Plain and Mount Hotham are close to Omeo and the other towns in the region. They have a high demand for seasonal staff in the winter. The majority of the seasonal demand for mountain biking will be in the non-winter period. An opportunity to share staff, housing and other infrastructure and services exists.	Opens the possibility of having staff live at Dinner Plain or Omeo for the year, splitting their time between winters at Mount Hotham and non-winter periods in Omeo.	Medium Term	Medium	Partnership. Seek to develop a partnership with Dinner Plain and Mount Hotham through Alpine Resorts Victoria and the Alpine Shire.
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Destination Marketing and Promotion



Table 17. ROADMAP – Destination Marketing and Promotion Actions

DRIVER	ACTION	DESCRIPTION	OUTCOME	TIME FRAME	IMPACT	ACTION TYPE
Identified by businesses as a significant area that would assist businesses capitalise on the investment in the Omeo Mountain Bike Park (See Figure 15). Improved destination management, governance and leadership is in some ways a pre-cursor to this action being able to be successful. To increase marketing and promotion and increase demand when the supply of services and products may not be ready may be counter intuitive.	M1	Develop and implement a marketing strategy targeting markets that are aligned to outdoor active and the concept of the Omeo Adventure Hub. Undertaking a small branding exercise (as recommended in the Action Plan (2020)) that can be commenced immediately. This action may best be completed as a medium term project when other capacity and business elements are implemented.	Improved and targeted marketing and promotion of the Omeo and Region offering.	Short to Medium Term Implement improved governance and leadership recommendations.	Medium The bike park will market itself on social media and other informal means without a formal strategy.	Partnership Work with DGL and MTB specific channels to develop and implement.
	M2	Tactically, partner with Tourism NE in the ‘Ride High Country’ brand and promotions. The average consumer would see Omeo as part of the High Country. Partner with TNE and DGL in promoting Omeo as a part of the Ride High Country Brand.	Piggy back on an already successful product strength and campaign for the High Country. Benefits both TNE and DGL by expanding the suit of products strengthening the brand.	Short Term. Meet on site with the CEO’s of DGL and TNE to develop a partnerships.	High. An already existing market position, product strength and brand can be utilised for Omeo	Partnership. Between EGSC, DGL and TNE.



Business Development and Support

Table 18. ROADMAP - Business Development and Support Actions

DRIVERS	ACTION	DESCRIPTION	OUTCOME	TIME FRAME	IMPACT	ACTION TYPE
Identified through several sources including the survey. Figure 15 of this report identifies two areas from the survey results that these recommendations seek to address at least partially. Working with business to help overcome barriers to their continued growth and investment is critical to the destination growing as seamlessly as possible.	B1	<p>Aligned to recommendation G1 – increase access for businesses in the region to business development support.</p> <p>The Shire and ORBTA collaborate in a series of business activities including training, mentorship and other elements sought by business,</p>	Businesses can access support including training, mentorship, and strongly aligned to action G1.	<p>Short to Medium Term</p> <p>Can be undertaken in coordination with G1.</p>	High	<p>Action and Partnership.</p> <p>The East Gippsland Shire can partner with providers in the region.</p>
	B2	<p>Business finance support.</p> <p>This has been identified in the survey as a barrier to investment. Bank and non-bank lending to tourism and visitor economy based businesses can be difficult. Work with the banks to undertake finance lending education services to ORBTA and businesses in the region.</p>	Having formal education sessions with banks and non-bank lenders about the types of things lenders are looking for can help businesses with loan applications.	<p>Ongoing</p> <p>This could be an annual opportunity in the region.</p>	Medium	<p>Partnership.</p> <p>East Gippsland Shire ORBTA and the banking sector.</p>
	B3	<p>Business Attraction</p> <p>Develop a series of investment incentives for business. This may include a business concierge service to shepherd planning applications through the process, or waiving fees for businesses investing in Omeo.</p>	Business often sees hurdles in the process of application for planning approvals – a support service helping business understand what it can do as opposed to what it cannot do may help investors.	<p>Short to Medium Term</p> <p>Can be aligned to the soon to be launched new East Gippsland Investment Strategy – ties in well together.</p>	Medium	<p>Action.</p> <p>East Gippsland Shire led.</p>



Enabling Core Infrastructure

Table 19. ROADMAP – Enabling core infrastructure - Actions

DRIVERS	ACTION	DESCRIPTION	OUTCOME	TIME FRAME	IMPACT	ACTION TYPE
Core infrastructure is essential to attracting businesses and visitors alike. This can be in the form of water, sewage, roads, connectivity (telecommunications), parking, toilets, parking etc. Businesses have identified this as an area for improvement. We also recognise the rate capped environment in which Council works and the investment that has occurred to date.	I1	Justice Precinct Development. Continue to plan for the adaptive use of the Justice Precinct in Omeo as a potential commercial and community hub.	A key site in Omeo is used adaptively to provide opportunities for the community and business. An ‘adventure hub’ similar to Queenstown, NZ should be considered in line with the High Country Adventure theme.	Short to Medium Term Work has commenced.	High	Action East Gippsland Shire is leading this currently.
	I2	Swifts Creek, Benambra and Ensay currently rely on septic systems for the treatment of waste water. Providing options for businesses to grow and expand and also provide the foundation for more housing should demand require is important.	The Structure Plan that Council has commenced for Swifts Creek will look at alternative waste water systems. Barriers to septic systems at Ensay and Benambra are not considered as high as Swifts Creek, reducing the impact of the possible treatment systems on investment.	Medium Term	Medium Options exist now but are more expensive and complex.	Council action through the Structure Plan underway.
	I3	Review the performance of the Council owned Caravan parks at Omeo and Swifts Creek. To ensure the best level of service is provided. Various performance issues were raised during the consultation for this report. Work with the commercial operator to understand what improvements can be made.	Improved visitor services and increased occupancy are possible.	Medium Term	Medium They are currently open for business.	Action
	I4	Walking Tracks. Consider implementing the trail projects including the trail from Omeo to the Caravan Park and Golf Club as critical walking and cycling track infrastructure.	Build the experiences and products aligned to the existing plans and ‘positioning’ of the region and expand the list of experiences that non mountain bikers can participate in while staying in the region.	Medium to Long Term	Medium Will expand the product suite.	Action

	I5	Signage and Wayfinding and Public Toilets Improvements. These are linked together as they form the basics of any successful destination. Good wayfinding and interpretation and clean and safe public toilets continue to underpin good visitor services.	<p>People know where to go for services, and directions are clear, public toilets that are clean and safe are critical for good visitor servicing.</p> <p>Visitor information is readily available through a variety of means including online, signs, and in person when available.</p>	Short to Long Term Continual improvement is required.	High	Action
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Experience Development



Table 20. Roadmap – Developing Experiences as an attractor to the region

DRIVERS	ACTION	DESCRIPTION	OUTCOME	TIME FRAME	IMPACT	ACTION TYPE
Experience development is a key driver in creating demand for a region. Omeo and region have some strong hero experiences, and enhancing some and providing further support experiences will improve visitor length of stay and visitor spend.	E1	Aligned to the Destination Management Plan for Gippsland, seek to work with operators on the development of experiences in the outdoor adventure and nature based themes. The DMP for Gippsland targets Omeo as the region's adventure hub.	Further experiences support the increase in demand for existing visitors to stay longer and increase yield, and for new visitors to be attracted to the region.	Ongoing	Medium	Influence East Gippsland Shire actively engages with industry and DGL to drive experience development.
	E2	Equine Tourism Development Further develop the equine tourism opportunities identified in the pre-feasibility report undertaken in 2025 for East Gippsland Shire Council and work with potential operators.	Potential experiences offered in the market place based on the high country themes of cattlemen, horses and brumbies.	Short to Medium Term	Medium	Influence. East Gippsland Shire Council to support operators.
	E3	Swifts Creek Nature Based Tourism Implement the Swifts Creek Nature Based Tourism study recommendations including development of trails and cycle routes	Builds experiences outside Omeo and develops the region more broadly. Supports Swifts Creek as a nature based tourism destination.	Short to Medium Term	Medium	Action. East Gippsland Shire Council leads the implementation of the plan.

6.2 Summary

The following table provides a summary of the roadmap. It should be read in conjunction with the recommendations contained in the previous pages.

Table 21. Summary Roadmap (Plan on a Page)

ACTION	DESCRIPTION	IMMEDIATE		TIMEFRAME			IMPACT
				SHORT TERM	MEDIUM TERM	LONG TERM	
GOVERNANCE AND LEADERSHIP							
G1	Implement a fit for purpose governance model comprised of relevant Council staff and ORBTA reps to drive outcomes.			<input checked="" type="checkbox"/>			POTENTIALLY HIGH
G2	Organise famils/events featuring external experts in destination management, and growth for regional businesses including the destination as a whole.		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		MEDIUM
G3	Improve the flow and use of market based data at a destination level for decision making and performance reporting.		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		MEDIUM
HOUSING							
H1	Undertake a social housing investment strategy and action plan to assist with the creation of staff housing for workers in the visitor economy and other areas.		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		HIGH
H2	Undertake a review of the land zoning and traffic movement in Omeo as part of the impending Structure Review for Omeo.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		POTENTIALLY HIGH
H3	Seek to improve shared housing between State Government departments when vacancies arise.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		MEDIUM
STAFF RECRUITMENT AND RETENTION							
S1	Develop a formal partnership with a training provider (s) on behalf of the entire destination to provide staff training.		<input checked="" type="checkbox"/>				MEDIUM TO HIGH
S2	Investigate how more backpackers and overseas people working on temporary visas can work in Omeo and District.		<input checked="" type="checkbox"/>				MEDIUM
S3	Create a staff attraction prospectus outlining the benefits of living and working in the high country.				<input checked="" type="checkbox"/>		MEDIUM
S4	Investigate seasonal Workforce Sharing with Mount Hotham to provide year round work.				<input checked="" type="checkbox"/>		MEDIUM
DESTINATION MARKETING AND PROMOTION							
M1	Develop and implement a marketing strategy targeting markets that are aligned to outdoor activities and the concept of the Omeo Adventure Hub. Include a short term branding exercise.			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		MEDIUM
M2	Develop a partnership with Tourism NE and Destination Gippsland to expand the ‘Ride the High Country’ brand and product to Omeo.			<input checked="" type="checkbox"/>			HIGH
BUSINESS DEVELOPMENT AND SUPPORT							

ACTION	DESCRIPTION	TIMEFRAME					IMPACT
		IMMEDIATE		SHORT TERM	MEDIUM TERM	LONG TERM	
B1	Increase access for businesses in the region to business development support. Aligned to G1.	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		HIGH
B2	Work with lenders to support businesses in the region on understanding how to finance projects and borrow capital.	ONGOING					MEDIUM
B3	Develop a series of business investment attraction incentives aimed at supporting businesses to grow, expand and invest in the region.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			MEDIUM
ENABLING CORE INFRASTRUCTURE							
I1	Justice Precinct Development Planning and Development. Work with the EGSC on the finalisation of the plan and implementation.			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		HIGH
I2	Investigate waste water treatment options at Swifts Creek through the Structure Plan review as it has been identified as a barrier to investment and consider improvements at Ensay and Benambra.				<input checked="" type="checkbox"/>		MEDIUM
I3	Review the performance of the Council owned caravan parks at Omeo and Swifts Creek. Seek performance improvements from the existing operator at Omeo.				<input checked="" type="checkbox"/>		MEDIUM
I4	Implement the Swifts Creek Nature Based Tourism Strategy completed in 2025.			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MEDIUM
I5	Continue to improve Signage and Wayfinding and Public Toilets in the region including visitor servicing requirements.	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	HIGH
Experience Development							
E1	Develop experiences based on the outdoor active and nature based themes aligned to the Omeo Adventure Hub proposal from the Gippsland DMP	ONGOING					MEDIUM
E2	Equine Tourism Development as outlined in the pre-feasibility assessment prepared for East Gippsland Shire Council	ONGOING					MEDIUM
E3	Swifts Creek Nature Based Tourism Study Implementation	ONGOING					MEDIUM

7 Conclusion

The investment made by the East Gippsland Shire Council, the State and Federal Governments is coming to fruition with the Omeo Mountain Bike Park set to open officially later in 2025. Word is already circulating in the mountain bike community that Omeo Bike Park could well be one of the best in nation.

The business case completed in 2019 and reviewed in 2021 provides a range of estimates of uses from local and regional visitors to domestic and international visitors. The business case was undertaken on the presumption that supply of services such as accommodation and food and beverage would not dampen demand. That is there is an adequate supply of services provided by the private sector to support the ongoing increase in visitors.

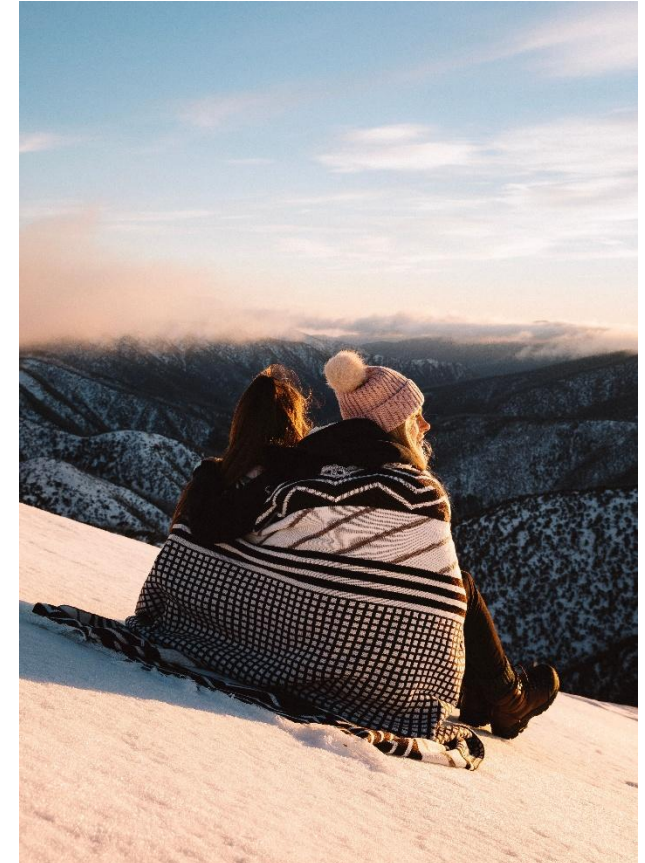
This tourism ecosystem mapping project undertaken for the East Gippsland Shire Council provides a snapshot into the current services and supply of among other things accommodation. This report has been compiled using desktop research, a survey of business and community in the Omeo Region (including Swifts Creek and Benambra), industry knowledge and past reports.

The investment roadmap finds that there will be a shortage of accommodation and most likely a shortage of staff to supply the growing business needs in the region. A series of recommendations are made as part of the road map that aim to:

- Support investors in making decisions
- Aid businesses to grow and work together
- Market the region effectively to support business investment and growth
- Provide the necessary governance and leadership framework for the destination, and
- Ensure the regional infrastructure is fit for purpose.

The report provides these recommendations knowing that to overpromise is to under deliver. Accordingly, the recommendations are not seen as overly costly but will provide a greater level of capacity to deliver, and greater partnerships around the offering, as well as greater support to investment.

Omeo and the broader region have a strong future, and the Mountain Bike Park will help drive economic and social success.



Appendix A – Benchmark Case Studies: Lessons for Omeo

In the following pages, we highlight several mountain biking destinations – ones that Omeo can aspire to and learn from. Below is a summary of those learnings.

Learnings for Omeo

Omeo can carve out a distinctive place-based trail identity by combining its alpine terrain, character, natural beauty, and access to nearby experiences and touring routes. By adopting best practices from Derby's maturity and Atherton's strategic ambition, Omeo can position itself as a sustainable, community-led and high-quality Australian mountain bike destination.

As Omeo grows its mountain bike destination credentials, key lessons from other mountain bike trail destinations offer powerful insights particularly around:

- Identifying gaps in the existing product, services and experience offering that would be required to accommodate increased visitation, and
- Identifying commercial investment opportunities that would establish the Omeo Region as a world-class tourism destination and any barriers to investment.

These insights include:

1. POSITION TRAILS AS THE HEART OF A MULTI-DAY EXPERIENCE

Other trail destinations have proved that mountain biking alone can attract high-yield visitors — but coupling it with nature, culture, wellness, food and boutique stays increases both length of stay and visitor spend. Omeo should similarly promote trail-based experiences that link to lakes, lookouts, heritage walks, local food, and other activities within the region.

2. INVEST EARLY IN TRAILHEAD AND VISITOR FACILITIES

Investment in trailhead amenities — including parking, toilets, signage, bike services (hire/retail), and shuttles can pay off. For Omeo, building an engaging, accessible, and family-friendly trailhead precinct will be critical to first impressions, day-visitor conversion, and overall rider satisfaction. Investment in interpretation and cultural storytelling is an important factor to include.

3. EMBRACE EVENTS AND SEASONALITY

Signature events can assist to maintain relevance, brand and boost mid-week trade. Omeo should pursue competitive and recreational events suited to its terrain and calendar — especially during shoulder seasons when accommodation is available, and the town is quieter.

4. ENGAGE THE COMMUNITY AND PLAN FOR GROWTH

Many successful mountain bike destinations were built on strong community visioning and grassroots energy. Omeo can draw from this by ensuring local businesses, residents and Traditional Owners help guide decision-making — and by investing in shared infrastructure that benefits both locals and visitors.

5. MANAGE GROWTH SUSTAINABLY

Mountain bike destinations, as they expand, can face growing pains including trail wear, congestion at peak times, and managing diverse users. Omeo can prepare for future growth by implementing a sustainable governance model early, securing ongoing trail maintenance funding, and planning for visitor dispersal during high-traffic periods.

Equally important is addressing accommodation mix and capacity — offering a diverse range of options from budget-friendly cabins to boutique lodges will ensure Omeo can meet the needs of different visitor segments and capitalise on extended stays.

1. Benchmark Case Study: Blue Derby Mountain Bike Trails, Tasmania

AN ESTABLISHED MOUNTAIN BIKE DESTINATION

Derby's experience exemplifies how targeted investment in adventure tourism can rejuvenate a rural economy and community. The success of the Blue Derby trails underscores the potential for sustainable tourism to drive economic growth, social cohesion, and international recognition for small towns.

SUMMARY

- Proximity to markets and access: 1.5hrs drive from Launceston / Airport – strong brand and quality trails drives the destination)
- 125kms of trail network, 100-800m vertical, 56 trails. Additional 45kms of trails are in development
- 30,000 visitors per year²⁰
- Lifting, shuttle service
- Accommodation is available
- Dorset Council (in 2022) handed over operations to the Blue Derby Foundation with the council retaining management of construction and ongoing maintenance. The Blue Derby Foundation operates as an independent charity, managed by a volunteer Board of Directors. The Foundation currently has 90 members and aims to raise funds to maintain the Blue Derby trail network.
- The trails are located across multiple land tenures – Dorset Council (Local Government), Sustainable Timbers Tasmania (permanent timber production) and Crown land (managed by the Tasmanian Parks and Wildlife Services).
- Additional experiences – link to longer mtn bike journeys trails (Derby to the Sea at St Helens), some wellness experiences nearby (Floating Sauna), natural beauty, breweries and nearby vineyards
- Trails are free to ride though paid shuttles can be booked through private operators.

²⁰ <https://admin.platform.auscycling.org.au/uploads/mtb-resource-rise-of-blue-derby-case-study.pdf>

BACKGROUND

Originally established in the late 19th century as a tin mining hub, Derby experienced economic decline following the closure of mines and associated industries. By the early 2000s, the town faced dwindling population and limited economic prospects. In response, local authorities sought to revitalise the area through tourism, leading to the development of the Blue Derby Mountain Bike Trails.

TRAIL DEVELOPMENT AND MAINTENANCE

In 2015, the Blue Derby trail network was inaugurated with an initial investment of approximately \$3.1 million, funded in part by a \$2.5 million grant from the Federal Government's Regional Development Australia Fund. The project aimed to create a world-class mountain biking experience by constructing over 80kms of purpose-built trails through temperate rainforest and rugged terrain. The trails cater to riders of varying skill levels, offering a diverse range of experiences.

A community Master Planning project is currently awaiting funding to continue - with a Concept Plan (Jan 2022) currently available with the objectives to:

- Support operational sustainability for multiple use
- Balance the needs of multiple stakeholders and user groups
- Position Derby as an iconic mountain biking destination

AMENITIES AND ACCOMMODATION

The town of Derby supports the amenities including bike hire and retail and repair workshops, shuttle services, pump track, sightseeing tours, restaurants (2), cafés (2), bar (2), skills coaching and group skills sessions, and a range of tours.

On the official website accommodation listings have dropped from 14 properties in 2022, to 11 in 2025. Some Derby accommodation businesses tallying more than 300 nights per year.²¹

²¹ <https://northeasternadvertiser.com/featured-articles/council-cashes-in-on-commission>

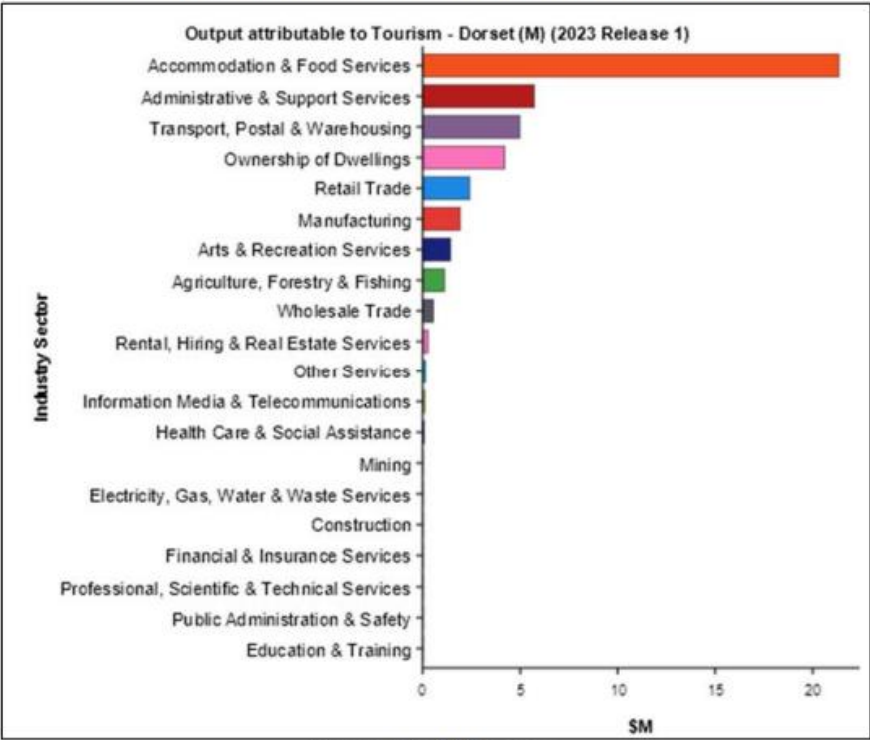
There are 4 free camping locations nearly by, and a \$10 camping fee at Derby Park right in town.

ECONOMIC IMPACT

The introduction of the Blue Derby trails has had an economic impact on the region:

- **Visitor Numbers:** By 2017, the trails attracted approximately 30,000 visitors annually, with riders spending an average of four to five nights in Derby and additional nights elsewhere in Tasmania.²² The rider market is considered to be families, beginners and professional mountain bikers seeking leisure and technical trails.
- **Financial Contribution:** The Derby Structure Plan 2024-2044, adopted by Council 24 June 2024 states that there is no specific economic data available for Derby. Notwithstanding this, there is economic data that specifically relates to the tourism sector within Dorset which is likely to correlate with Derby on the basis that it is a significant MTB tourism destination. The tourism sector is responsible for contributing approximately \$44.1m to the total gross revenue which equates to 4.9% of the total revenue generated by industry sectors within the Dorset LGA. Almost 50% of the revenue that is attributable to the tourism sector is within accommodation and food services (refer to Figure 17). The tourism sector also contributes to 10.5% of all jobs within Dorset with the majority employed within accommodation and food services sector. Overall, the tourism sector is estimated to contribute \$22.78m, or 5.8%, of the total value-added contribution industry sectors make to the Dorset economy which is fifth behind the agriculture, ownership of dwellings, construction and manufacturing sectors (refer to Figure 18).

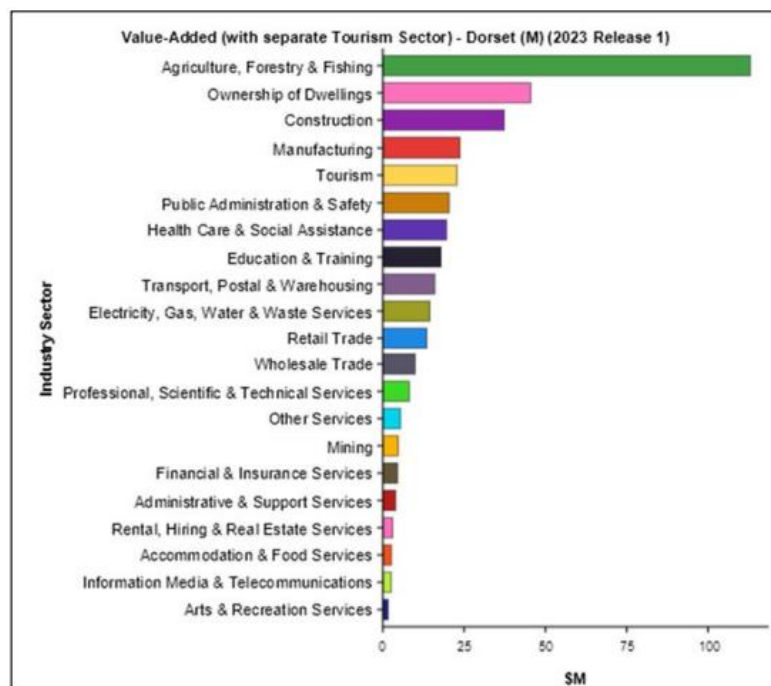
Figure 17 - break down of revenue by service within the tourism sector.



Source: REMPLAN Economy

²² <https://admin.platform.auscycling.org.au/uploads/mtb-resource-rise-of-blue-derby-case-study.pdf>

Figure 18 - contribution to value-added sector within Dorset.



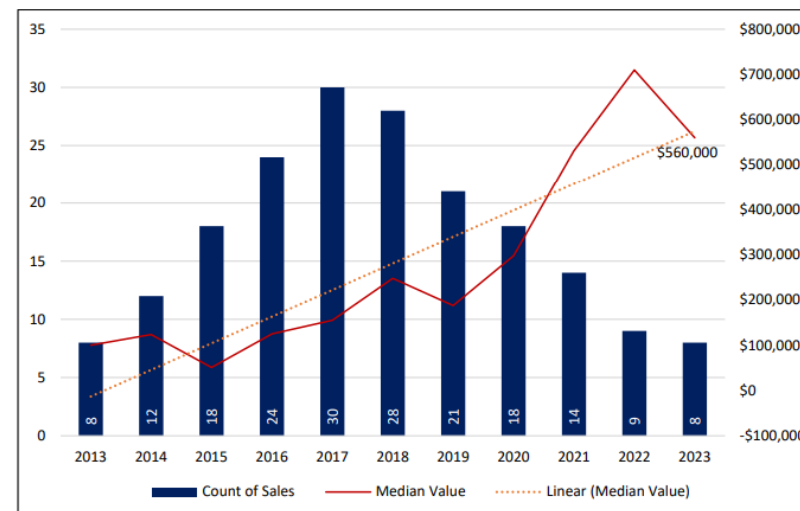
Source: REMPLAN Economy

- **Property value:** The Derby Structure Plan 2024-2044 identifies the following property trends:
 - The median residential property value in Derby is \$560,000.
 - Derby has recorded substantial growth in values. Since 2013, the median value has increased by \$360,000 which is a 460% increase over the 10 year period.
 - On average, the median residential property value has increased by approximately 19% per annum since 2013.

²³ <https://admin.platform.auscycling.org.au/uploads/mtb-resource-rise-of-blue-derby-case-study.pdf>

- Derby has recorded an average of 17 property sales per annum over the past decade. The volume of sales has declined year on year since the peak of 30 sales in 2017, to a 10-year low of 8 sales in 2023.
- Over the past 3 years, the median value has grown by an average of 23.5% per annum and peaked in 2022. The median value fell from a peak of \$710,000 in 2022.
- The upward trend in value growth in the past 3-years occurred alongside a lower volume of sales, indicating buoyant demand conditions, but with less stock available to the market
- **Revenue:** Blue Derby Trust (merchandise, partners) donations, event income and sponsorships. In FY 19-20 Dorset Council received \$190,000 in revenue from the trails (45% sponsorship, other Council contribution 13%, shower revenue 10%, waste levy 11%, merchandise 11%, donations 2% and hire of trails 1%). Expenses are unknown.
- **Business Growth:** The surge in visitors spurred the establishment of new businesses, including cafes, accommodation providers, bike shops, and shuttle services, revitalising the town's commercial landscape.²³

Figure 22 - Residential property sales and values in Derby between 2013 and 2023 (financial year)



Source: Residential property sales, DPI/PWE, 2013-23.

SOCIAL AND COMMUNITY IMPACT

Beyond economic benefits, mountain bike tourism has fostered significant social changes:

- **Population Growth:** The revitalisation attracted new residents and entrepreneurs, reversing population decline and injecting fresh energy into the community.
- **Youth Engagement:** Local youth have found employment opportunities in tourism-related businesses, promoting skill development and community involvement.
- **Events:** Derby has hosted international events such as the Enduro World Series (3 times), enhancing community pride and global recognition.²⁴
- **Marketing**
 - Google: 4.8 stars, 617 reviews
 - Facebook: 21K likes, 23K followers
 - Instagram: 23.9k followers

CHALLENGES AND CONSIDERATIONS

While the transformation has been largely positive, it has presented challenges:

- **Resource Management:** Balancing tourism growth with environmental sustainability and resource industries like forestry has required careful planning and community consultation.²⁵
- **Infrastructure Strain:** The rapid increase in visitors has placed pressure on local infrastructure, necessitating ongoing investment and development.²⁶

- **Financial Risks:** The park faces financial risks associated with maintaining its extensive trail network due to its reliance on various revenue streams e.g. merchandise and event profits can vary year to year.
- **Environmental Risks:** Soil erosion from heavy use, extreme weather events as experienced with a landslide in 2022 that took out 3 trails and impacted the season opening. Native logging in areas close to the trail network impact on trail experience and potential erosion issues.

²⁴ <https://web.archive.org/web/20180808173434/http://www.enduroworldseries.com/ews-2019-round-2-and-its-back-to-tasmania/>

²⁵ <https://www.abc.net.au/news/2017-12-26/mountain-bike-trails-driving-major-change-in-derby/9276384>

²⁶ <https://www.ambmag.com.au/feature/derby-then-and-now-581841/>

2. Benchmark Case Study: Atherton Forrest Mountain Bike Park, QLD

A GROWING MOUNTAIN BIKE DESTINATION

The proposed expansion of the Atherton Forest Mountain Bike Park (AFMBP) aims to transform the park from a regionally significant facility into one of national importance.

Stage 2 represents a transformative opportunity for the region— driving tourism, economic growth, job creation and cultural engagement. With its proximity to major transport links, strong governance support, and a clear strategic vision, the park is well-positioned to become one of Australia’s top-tier mountain biking destinations.

Information provided here was sourced from the Atherton Forest Mountain Bike Park Stage 2 Business Case report.

SUMMARY

- Situated in Far North Queensland, about 1,800 km north of Brisbane and 100 km west of Cairns (and Cairns airport)
- Stage 2 of planning will increase the trail network from 55km to almost 100km – with the aim to transform the region to a nationally significant park under the Auscycling Australian Mountain Bike Trail Guidelines
- Features a network of 17 single-track trails that cater to riders of varying skill levels
- Currently managed and operated by Tablelands Cycle Sports an Incorporated Association representing cycle sports enthusiasts in the region
- Unaudited figures and assumptions suggest that between 10,000 and 20,000 users for the park per annum.

BACKGROUND

The Atherton Forest Mountain Bike Park has been in existence since 2013 when government grants to build the park were provided to Tablelands Cycle Sports. Coincidentally, the park was created at roughly the same time as Derby in Tasmania. Current Park success is attributed to strong community support, being part of a broader regional approach to mountain biking, meeting market demand, trail head located close to the centre of town and offering parking, information and

other trail head facilities in addition to new commercial opportunities currently in development.

The concept plan, if implemented, will deliver Atherton a nationally significant trail park and subject to developing appropriate community support and implementing appropriate governance arrangements, a sustainable and highly attractive economic and tourism driver for the region that aligns with the strategic context of the region.

AMENITIES AND SERVICES

The park is equipped with facilities to ensure a comfortable visit, including bike rental services and informative signage throughout the area. Local businesses, such as Atherton Bike Hire, offer a range of bicycles to fit all sizes and styles of riders, allowing visitors to park their cars at the hire shop and explore the trails conveniently.

Additionally, the nearby NRMA Atherton Tablelands Holiday Park provides accommodations with amenities tailored for mountain bikers, including a bike wash and service bay.

ECONOMIC PROJECTIONS

- Trail usage is expected to grow from 24,259 users in Year 1 to 40,974 users by Year 10
- Visitor spending in the Tablelands LGA will rise from \$4.7 million in Year 1 to \$8.4 million in Year 10
- Over the 10-year period, total spending is projected at nearly \$70 million, including:
 - \$7.08M on food, accommodation, and services in Year 10
 - \$1.3M on bike hire and related recreation services in Year 10.

JOB CREATION AND INDUSTRY DEVELOPMENT

The expansion is expected to be a key regional economic stimulant, especially in the tourism and service sectors:

- 15.6 FTE jobs during the 2-year construction phase
- 26.1 FTE jobs in Year 1, growing to 46.1 jobs by Year 10, primarily in:
 - Accommodation and hospitality

- Retail and local services
- Recreation (e.g., bike hire, shuttles, and guiding)
- Over the 10-year operational period, \$35 million in regional income is projected, representing direct and indirect employment, business profits, and tourism service revenue.

CATALYST FOR ACCOMMODATION AND SERVICES

While Atherton is already known as a cycling destination, the expansion will significantly boost demand for accommodation and supporting tourism infrastructure:

- Increased overnight stays are anticipated to support new market-aligned accommodation development
- Growth in hospitality demand will provide impetus for expanding cafes, restaurants, local produce offerings, and family-friendly experiences
- Proximity to Cairns International Airport (1.5 hours by road) enhances Atherton's accessibility for national and international visitors.

The Stage 2 development will also stimulate ancillary business opportunities, including:

- Bike repair and retail
- Event management for local and national mountain biking competitions
- Cultural and ecological tours in collaboration with Traditional Owners

SOCIAL, HEALTH AND COMMUNITY BENEFITS

Beyond economic impacts, the expansion contributes to the social and environmental wellbeing of the region:

- AFMBP benefits from strong community involvement, with local volunteers dedicated to maintaining the trails
- Encourages active lifestyles across all demographics, including older residents through programs like the Sixty and Over (SAO) cycling group
- Enhances community pride and liveability, attracting younger residents and families

- Supports volunteerism and local training programs, such as trail stewardship traineeships for youth, creating pathways to employment and regional engagement.

CULTURAL PARTNERSHIPS AND ENVIRONMENTAL STEWARDSHIP

The partnership with the Tablelands Yidinji Aboriginal Corporation (TYAC) forms a core part of the park's development. TYAC's involvement spans branding, cultural overlays on trails, and participation in governance—highlighting the project's role in reconciliation and cultural tourism.

Additionally, the trail network is designed to respect environmental and cultural values, with single-direction trails, minimal crossovers, and sustainable construction practices.

CHALLENGES AND CONSIDERATIONS

While AFMBP has seen significant advancements, it faces challenges similar to those experienced by other mountain bike destinations:

- **Infrastructure Maintenance:** Ensuring trails and facilities are consistently maintained to meet safety and quality standards requires ongoing investment and community support
- **Environmental Impact:** Balancing trail development with the preservation of natural ecosystems is crucial to maintain biodiversity and prevent degradation of the landscape
- **Sustainable Funding:** Developing a financial model that supports long-term operations, including potential revenue streams from events, sponsorships, and user contributions, is essential for sustainability.

3. Benchmark Case Study: Forest Mountain Bike Trails, VIC

A GROWING MOUNTAIN BIKE DESTINATION IN THE OTWAY RANGES

Forrest, located in the Otway Ranges of Victoria, has transformed from a declining timber town into a vibrant hub for mountain biking and nature-based tourism. The development and continuous enhancement of its mountain bike trail network have played a pivotal role in this transformation, attracting visitors and stimulating the local economy.

In the early 2000s, the Victorian Government and the community invested in formalising and upgrading mountain bike trails to reposition the town as a nature-based tourism destination. Initial funding of \$500,000 was used to transform informal trails into a strategic asset. The area now serves as a key trailhead within the broader Great Otway National Park experience and continues to evolve through integrated planning and events.

SUMMARY

- **Location:** Approximately 160 km southwest of Melbourne and 84 km west of Geelong
- **Trail Network:** Nearly 100 km of singletrack across 36 trails, catering to all skill levels
- **Recent Upgrades:** The Forrest Mountain Bike Revitalisation Project, completed in October 2023, included new trails, a pump track, skills park, and upgrades to existing trails
- **Visitation:** The upgraded trails are anticipated to attract up to 50,000 visitors annually
- **Management:** Collaborative efforts between the Forrest community, Colac Otway Shire Council, and the Victorian Government.
-

AMENITIES AND SERVICES

Forrest offers a range of amenities to support visitors:

- **Accommodation:** Various options, including guesthouses and rentals. Including boutique and group accommodation, campgrounds, cabin stays and eco-lodges
- **Dining:** Local establishments like the Forrest Brewing Company and Platypi Chocolate provide dining experiences featuring local produce
- **Recreation:** Beyond mountain biking, visitors can enjoy nature walks, hiking trails to destinations like Stevensons Falls and Lake Elizabeth, wildlife spotting, camping, fishing, and horse riding
- **Bike hire and shuttle services** are increasingly available as the trail network grows.

ECONOMIC AND TOURISM IMPACT

- **Visitor Attraction:** The trail network has become a significant drawcard, hosting events like the Otway Odyssey and attracting thousands of visitors annually
- **Economic Stimulus:** The influx of tourists has revitalised local businesses, leading to the establishment of new enterprises and boosting the hospitality sector. Forrest is estimated to attract tens of thousands of visitors annually for mountain biking, particularly during key events like the Otway Odyssey
- The revitalisation of the trail network in 2023 was designed to boost local economic activity and draw return visitation
- The growth in trail tourism has supported local business development in accommodation, F&B, bike servicing, and guiding
- As one of the earliest purpose-built mountain bike destinations in Victoria, Forrest helped prove the model for trail towns across the state.

COMMUNITY AND ENVIRONMENTAL CONSIDERATIONS

- **Community Engagement:** The Forrest community has been actively involved in planning and decision-making processes, ensuring developments align with local values and sustainability goals.
- **Environmental Stewardship:** Efforts have been made to ensure that trail development and tourism activities are conducted sustainably, preserving the natural beauty and biodiversity of the Otway Ranges
- The trail network sits within the Great Otway National Park, demanding careful integration of sustainable practices
- Local engagement remains a cornerstone of Forrest's success, particularly through community consultation and local volunteer support.

CHALLENGES AND OPPORTUNITIES

- **Competition:** With the emergence of other mountain biking destinations in Victoria, Forrest faces competition in attracting visitors. Continuous investment in trail maintenance and marketing is essential to maintain its appeal
- **Infrastructure Needs:** As visitation increases, there is a need for further development of infrastructure, including accommodations (high-end) and amenities, to cater to tourists' needs
- Forrest is working to better integrate its wider tourism offerings, such as wellness and food, with the cycling product

