



Vision

By 2010 Victoria's tourism industry is recognised for delivering outstanding visitor experiences.

*"Don't lower your expectations to meet your performance.
Raise your level of performance to meet your expectations.
Expect the best of yourself, and then do what is necessary to
make it a reality."*

Ralph Marston



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Chairman's message

Providing quality visitor experiences is essential if Victoria is to maintain and grow its reputation as a desirable tourism destination.

The nature of Australia's business and regulatory environment allows a relatively high degree of freedom when establishing and conducting business in the tourism and hospitality environment. Some perceive this as positive and others as negative, however without a regulatory framework tourism businesses have had to determine their own benchmarks for performance against which they believe market forces will respond. These key influences are generally driven by the desire to receive value for money, be safe and have memorable experiences.

To encourage sound business practices that assist with issues such as measuring performance and the challenge of consistent delivery, the tourism industry established its own voluntary accreditation program in the 1990s. It was realised quickly that accreditation could do much more. It had the capacity to improve levels of professionalism and ensure excellence outputs by individual businesses and across a range of businesses.

The *Tourism Excellence Strategy* strives to go a step beyond tourism accreditation. It is a deliberate attempt to integrate professionalism and an expectation for excellence across all facets of the tourism experience, from the perspective of the individual, the business, the destination, and industry networks, as well as those suppliers and agencies that influence tourism business outputs. It seeks to build a competitive advantage based on exceptional visitor experiences delivered by Victoria's exceptional tourism businesses that maintain standards of the highest quality.

The strategy focuses on the issue of quality, why it is important and how it can be improved. In recognition of the enormity of the scope of this project, its delivery has been grouped into seven key themes. Each theme will have goals, strategies, measures and links to a suite of tools.

Just as the scope of this strategy is enormous we believe the potential return to your business is enormous, and that there is greater risk to your business by not joining us as we travel a new pathway to profitability.

Jeremy Johnson

Chair, Tourism Excellence Steering Committee
CEO, Sovereign Hill



Striving for tourism excellence

Given the increasing competitiveness of the global tourism industry, the capacity to compete, now and in the future, relies on the ability to deliver quality tourism experiences and to develop a reputation for excellence.

Globally, striving for quality visitor experiences is the new minimum standard for tourism businesses. Internationally, this focus has been recognised and adopted by the European Union, Scotland, Wales, Canada and New Zealand. These countries have built a tourism industry that is characterised by its consistency, safety, reliability, efficiency and value for money when delivering a memorable experience.

These characteristics are being demanded by the more sophisticated, well-travelled consumer/visitor.

While businesses in the tourism industry associate good business practices with higher profits, product differentiation and satisfied customers are also crucial, especially in markets where the consumer is being bombarded by an ever-increasing number of marketing messages. Now, more than ever, the power of positive word-of-mouth referrals is a proven cost-effective way to improve business performance.

Victoria's tourism industry has an opportunity to distinguish itself by offering exceptional experiences that deliver high levels of satisfaction to visitors. By meeting or exceeding the expectations of visitors, the industry will enjoy greater repeat visitation and positive word-of-mouth referrals by those satisfied visitors, and build and sustain a competitive advantage.

Significant potential exists to enhance existing business practices and destination services to offer exceptional visitor experiences.

Quality tourism is achieved when back and front-of-house, business practices, local interdependencies and regional cohesiveness, are integrated seamlessly to deliver the promised visitor experience.

The perception of the level of excellence achieved will vary according to the experiences and expectations of the individual visitor.

It is undeniable that striving for tourism excellence needs to be a continual and ongoing process in the promise, offer and ultimate delivery of a quality experience.

Everybody has a role

The Victorian Government, through the provision of infrastructure, legislation, regulations, support and information, plays a pivotal role in providing an environment conducive to establishing and conducting business in our state.

Tourism Victoria, as a responsible marketer, also plays an important role in supporting and encouraging quality tourism experiences so as to ensure the marketing promise is delivered and that Victoria's industry remains competitive.

Amongst other things, industry associations seek to build the prosperity of member businesses by providing programs, independent and relevant information, advice and assistance. Working in partnership becomes a strength of the business, the sector and/or region.

A key role of the peak industry associations, Tourism Victoria and other State Government agencies is to assist those tourism businesses with the ambition to provide quality experiences and the passion to be recognised for their excellence.

The real driver and beneficiary of the *Tourism Excellence Strategy* will be tourism businesses, and the networks (destinations, regions, associations) with whom they are connected.

Our approach

Victoria's Tourism Industry Strategic Plan 2002-2006 highlighted the need for discussion about professionalism and standards and proposed a bold objective to create a competitive advantage based on visitor satisfaction.

In 2004 work commenced to develop an integrated strategy about tourism excellence that brought together the many elements (such as customer satisfaction, staff skills and business development) of existing tools (such as accreditation and tourism awards) and identify gaps that need to be addressed.

A small steering committee was established to discuss the significant issues that face the tourism industry in Victoria, with a view to identifying barriers to raising professionalism in the industry.

Some of these issues include:

- low participation rates in joining associations and cooperative marketing programs by operators
- skills shortages and mechanisms to address these shortages
- fragmentation of tourism networks
- scope and effectiveness of training and education of operators and staff

- suitability of professional and business development programs
- cost-benefit of business development tools
- the role of recognition and reward programs
- possible perception by operators that they are performing well, with all the necessary skills and knowledge, while it is other operators that are 'letting the industry down'.

The steering committee, comprised of industry representatives with a range of skills and knowledge, agreed that the task was too large to be considered at one point in time and in one document. To achieve quality visitor experiences it is necessary to consider the individual components that collectively contribute to the complete tourism experience.

Seven key areas have been identified. These are:

- understanding visitor needs and expectations
- people excellence – valuing your people
- business excellence – maximising business performance
- growing destinations – highlighting the complimentary nature of products and services within a destination
- industry participation – working together, contribution to the seamless integration between various tourism products
- fostering innovation – the adoption of innovative practices
- sustainability in tourism – consideration of financial, environmental, social and cultural impact of the business

Because visitor satisfaction is a key marketing objective, the *Jigsaw* was selected as the tourism excellence brand device to represent diversity as well as excellence. This also ensures alignment of visitor experience with the *Jigsaw* campaign.

Seven themes that focus on key ways to achieve overall excellence have been identified as basic components of the *Tourism Excellence Strategy*. Modules will be supported by specific programs and tools as well as the core strategy, which will continue to be developed over the life of the initiative. Each module is represented by a piece of the *Jigsaw*.

Several terms were considered to describe this initiative, including 'professionalism and excellence' and 'quality tourism'. It was decided that quality tourism experiences result from the little things done by the employee and the businesses in each of these seven areas identified. 'Tourism Excellence' was ultimately chosen as the preferred name for the strategy and program.



Recognising the time and resource constraints facing tourism businesses, this strategy has been designed so that you, the business owner, need not participate in each activity sequentially. Instead, our approach is to commit to annually revisit the seven pieces of the Tourism Excellence puzzle over a five-year period, with a view to producing and sharing a wide array of information that may assist in continuing to raise the standard each year.

This approach is intended to allow greater flexibility for businesses to engage in the areas most relevant at a time that is convenient. The approach also provides the opportunity for industry to engage and drive the direction of the Tourism Excellence strategy.

Victoria's peak tourism sector associations have been briefed on the Strategy and have collectively demonstrated their support by individually signing a pledge of support for the program.

Various businesses, associations, destinations and regions that independently expressed interest in the *Tourism Excellence Strategy* were briefed and have committed to become a group of "early adopters" for the modules over the next two to five years.

Both our Industry Association Partners and the Early Adopters have pledged that they will use their best endeavours to collaborate, cooperate and communicate for the purposes of the development of tourism in Victoria. Specifically the parties will collaborate to :-

- Act as an advocate for the *Tourism Excellence Strategy*
- Identify and share opportunities relating to one or all of the seven pieces of the Tourism Excellence Strategy
- Contribute to, use and/or provide feedback on components of the tool kits developed to support each piece of the Jigsaw of Excellence modules
- Share data that will be used to establish benchmarks against which progress will be annually assessed
- Authorise for their organisation to be profiled as an industry association partner or early adopter within collateral, speeches or the website

Module 1: Understanding visitor needs and expectations

This Tourism Excellence module, the first of seven to be developed, focuses on identifying and developing quality visitor experiences that meet and ultimately exceed expectations, by reinforcing the importance of research to enable the setting of benchmarks that measure, encourage and reward ongoing improvement.

While businesses in the tourism industry associate good business practices with higher profits, product differentiation and satisfied customers are also crucial, especially in markets where the consumer is being bombarded by an ever-increasing number of marketing messages.

Measurement tools are extremely important as they have the potential to provide independent feedback from the perspective of the customer. The tools are frequently under-utilised, especially by smaller businesses that have the most to gain.

One of the harsh realities of business is that not everyone has 20/20 foresight or an infallible instinct for making the right decision. Being informed and having accurate information will enhance your chances of success.

Successful marketing requires timely and relevant market information. Although the expense may be a deciding factor for many small businesses, there are significant cost benefits offered through the insight market research can offer. An inexpensive research program, based on questionnaires given to current or prospective customers, can often be a good starting point.

Market research also identifies trends that affect sales and profitability. Population shifts and local economic situations should be monitored to quickly identify problems and opportunities. It is also important to keep up with competitors' market strategies.

Do you know your customer?

Excellent visitor experiences are often underpinned by exceptional customer service. The concept of customer service standards will vary based upon your life experiences.

Customer service is often described as meeting, if not, exceeding customer expectations. Whilst there are fundamentals that underpin the delivery of quality customer service in all industries, tourism has an exceedingly high component of face-to-face contact over long hours (7 days a week, 24 hours a day) sometimes leading to inconsistency of service/

Striving for tourism excellence needs to be a continual and ongoing process in the promise, offer and ultimate delivery of a quality experience.

If it is so important, why don't some businesses undertake research?

Many tourism businesses owners believe that they already provide excellent visitor experiences, resulting in a low level of engagement with their visitors. Also, time and resource pressures are barriers to business owners and managers wanting to address this issue.

There is also a perception that measuring the visitor experience is too hard, will cost too much and "won't show me anything I don't already know", therefore is not worth doing.

There are many tools to aid businesses understand visitor needs and expectations. This Tourism Excellence module assists businesses choose the right tools for them.

So where is Victoria heading?

1. Victoria intends to create a competitive advantage through offering exceptional visitor experiences
2. Increase industry awareness that the provision of excellent visitor experiences positively impacts on the bottom line of the business
3. Assist businesses, regions and destinations gather meaningful data to measure current levels of visitor satisfaction and establish benchmarks
4. Victoria will improve packaging of information to create a tool kit to enable businesses better understand visitor needs and expectations
5. Encourage and profile Victorian businesses and/or destinations that deliver quality visitor experiences that meet or exceed expectations and create memorable experiences.

How do we achieve this?

1. Provide a tool kit for businesses that:
 - a. Explains the value of research, how to use and access it.
 - b. Outlines practical case studies.*Responsibility – Tourism Victoria*
2. Support the development and implementation of independent customer audit programs, industry “mystery shopper” programs such as Tourism Audit Services and Hotel Evaluations (Praise)
Responsibility – Steering Committee, Early Adopters
3. Develop a program of visitor research forums tailored for tourism businesses
Responsibility – Tourism Victoria supported by VTIC and associations
4. Provide regular communication with businesses
Responsibility – Associations, Tourism Victoria, Early Adopters
5. Investigate further statewide specific research through the CRC for sustainable tourism on visitor needs and expectations.
Responsibility – Tourism Victoria

Desired outcomes

An increasing number of tourism businesses surveying their customers.

An increasing number of tourism businesses including specific references to visitor experiences in their annual business plans.

More data relating to visitor experiences will be gathered to allow comparisons and benchmarks to be established for the benefit of all in our state.

Want to know more?

Visit the Tourism Excellence website containing toolkit, case studies and other relevant material to help achieve **our vision.....** tourismexcellence.com.au

Module 2: People excellence

This module aims to foster an innovative and creative workforce by attracting and retaining the right people and by providing a professional career path within the tourism industry.

Challenges

There appears to be limited recognition of the cost of recruiting new staff for a business.

The cost of training and retaining existing staff is often not compared to the cost of training new staff.

Many businesses do not consider staff professional development as a high priority and as a result it is often postponed (indefinitely).

Awareness of the training and skill development programs available is low.

The remoteness of many businesses is a barrier to tourism operators tapping into the population of graduating students.

Many people remain in the tourism industry for a short period of time.

Key directions

Review and assist businesses to improve recruitment processes, particularly in small and medium size enterprises, to attract the right people.

Reinforce the importance of people, and share the means/strategies by which you retain the right people.

Support the role of Service Skills Victoria by facilitating annual meetings between tourism operators and educators to consider the issue of creating career paths from entry level through to professional skill development.

Encourage students and those in the workforce to capitalise on the changing methods of delivery for many tourism courses eg remote and online learning.

Desired outcomes

Increased staff retention rates.

Tourism businesses show positive results in relation to the process of attracting the right people to work for them.

Survey results show a positive growth in the allocation of budget to cover professional development activities.

Less people leaving the tourism industry per annum.

Annual forums that bring together educators and tourism operators.

Further details will be released in late 2006

Module 3: Business Excellence

This module aims to facilitate the development of accessible and sustainable business development tools, and provide operators with the skills to improve standards and achieve long-term business sustainability through continuous improvement.

Challenges

The widespread nature of tourism businesses and the extended hours of operation make it difficult to provide an ideal time or location for widespread engagement in business development programs.

The perception that business development tools such as Tourism Accreditation, training programs and Tourism Awards are too costly, too time consuming or inaccessible.

The perception that business downturn and poor planning are not related.

Key directions

Encourage industry associations and training providers to work together to disseminate information that will impact on business practices.

Ensure that managers of business development tools work collectively to avoid duplication, increase synergies between the tools, and provide excellent cost-benefits.

Encourage operators to look at the complete lifecycle of their business – from start-up, through the growth and development of the business, to exiting the business.

Make comparisons with the competition: establishing benchmarks and measuring performance.

Desired outcomes

Increased take-up of business development tools by tourism business operators.

A more cohesive/collective approach to the running of tourism-related business development courses in Victoria, resulting in less duplication and a greater openness as to who may attend.

Ongoing support for quality business development initiatives such as Accreditation, Tourism Awards, Starting in Tourism, Succeeding in Tourism, Staying in Tourism, etc.

A reduction in the number of new tourism businesses that fail within the first 24 months of operation.

Further details will be released in late 2006

Module 4: Growing destinations

The focus of this module is to provide the tools and mechanisms to plan for the growth of Victoria's regions and destinations. This will be achieved by engaging the local community, selling the idea of the significance of tourism to them and fostering cooperation amongst tourism operators to deliver the complete visitor experience.

Challenges

The consumer requires a 'seamless' experience when visiting a town or region. If there is any part of the visitor experience that is less than satisfactory, then the reputation of the whole town or region might be tarnished by that poor experience.

For a number of years, Victoria's regions have had difficulty educating businesses that do not identify as primarily tourism businesses that they have an impact on the visitor's overall experience.

Many businesses continue to view other businesses in the same destination as competitors, rather than partners.

Key directions

Develop and implement a specific strategy designed to promote the significance of tourism at the state government and local council level.

Provide examples and techniques for engaging the whole community in tourism.

Provide best-practice examples of destination development.

Encourage mature destinations to mentor less mature destinations.

Desired outcomes

Achieve incremental increases in the number of tourism businesses that actively participate in Business and Tourism Associations (BTA), Local Tourism Associations (LTA) or Regional Tourism Associations (RTA).

Achieve incremental increases in the number of businesses that do not identify as primarily tourism businesses that actively participate in BTA, LTA or RTAs.

Increased council recognition and support for tourism (not relevant to all regions).

Further details will be released in early 2007



Module 5: Industry participation

This module aims to create an environment that nurtures the development of industry leaders, provides effective structures and encourages improved industry networks, participation and engagement.

Challenges

A lack of industry leadership has been identified and discussed at various workshops.

The majority of tourism businesses are small and operators often lack the time and/or resources to participate in industry-lead education and networking activities.

It is difficult to reach and educate businesses that view networking, participation and engagement as non-core to their day-to-day operations.

Many business operators have a non-business or tourism industry background.

Key directions

Identify methods to improve connections within our industry.

Continual improvement of the structure of Victoria's tourism industry.

Encourage increased participation and engagement with industry associations.

Reinforce the value of standards for our industry, through codes of conduct and self-regulated programs.

Identify ways and achieve increased industry engagement.

Desired outcomes

Increased participation and engagement of operators in the industry.

Stronger, more representative industry associations.

Increased cohesiveness within the industry.

Increased sharing of information between all stakeholders who have an impact in the visitor experience.

Development of a state-wide register of all tourism businesses.

Further details will be released in early 2007

Module 6: Fostering innovation

This module aims to inspire innovation and creativity within the industry by enhancing the capacity to challenge assumptions and foster reinvention, resulting in the development of innovative products and better use of available technology.

Challenges

Gain broader acceptance that innovation requires systematic approaches to continual improvement.

Raise Awareness of the positive relationship between the willingness to take risks and being innovative.

Remove the perception that being innovative is too hard.

Overcome the perception that if it's not new, it's not innovative.

Key directions

Encourage industry forums to include sessions that identify innovative approaches to problem solving and to encourage the audience to challenge assumptions.

Disseminate information about cutting-edge technology that has the potential to improve efficiencies.

Encourage businesses to continually improve through innovation.

Identify innovative product development possibilities by searching for best-practice examples, within and outside the tourism industry.

Source and disseminate a series of case studies that reinforce the value of continuous improvement.

Desired outcomes

See an increase in the number of forums that encourage thinking outside the square.

An increased number of businesses adopting new technologies and programs that will improve efficiencies, and report on the results.

Operators undertaking interstate or overseas study trips to learn about innovative products and destinations, and sharing what is learnt with the industry.

Further details will be released in mid 2007

Module 7: Sustainability in tourism

The module aims to encourage the adoption of sustainable financial, cultural and environmental practices by Victoria's tourism industry.

Challenges

More businesses need to understand that the way they conduct their business through investment, production, employment and marketing decisions is an important component of the impact of tourism on the environment and local communities.

Many businesses are not aware that by reducing energy consumption, minimising waste and cutting transport costs they can save money and so increase profits.

Only a small proportion of Victoria's tourism enterprises have adopted sustainable practices. They are mainly small nature-based business or large multi-national organisations in the aviation and hospitality sectors.

Key directions

Raise awareness of the business benefits of good environmental practice, including the development and promotion of success stories and case studies, and by Tourism Victoria leading by example.

Provide practical assistance, guidance and tools to tourism enterprises to help them reduce their environmental and social impact.

Provide incentives to accelerate the adoption of sustainable practices.

Reward and recognise excellent sustainable practices.

Identify the needs/barriers to tourism enterprises adopting sustainable practices.

Influence change by embedding sustainability into mainstream improvement measures.

Desired outcomes

Increased use of environmental best practice programs and tools.

Employment of a dedicated sustainable tourism project officer at Tourism Victoria to assist industry improve sustainable practices.

A dedicated website resource on sustainable tourism, including fact sheets, success stories, links and other tools.

Research reporting on the barriers to tourism enterprises adopting sustainable practices.

The establishment of a sustainable tourism advisory and advocacy body (Sustainable Tourism Partnership).

Further details will be released in mid 2007

Measuring success

Two key objectives of this strategy are raising the level of professionalism and increasing visitor satisfaction. There are difficulties, however, associated with measuring these goals, as quantifying these concepts is unavoidably subjective and influenced by individual experiences and expectations – what may represent an excellent experience to one person could be considered average by another.

The modular approach chosen for this strategy aims to make it easier to set actions and measures related to each of the themes. Some directions will support long-term aspirations. These will be balanced by short-term goals and measures that will be used to influence the direction of the second, third, fourth or fifth year of the development of a module.

Setting the scene - Victoria's tourism industry in 2004

In 2004, Victoria's tourism industry was surveyed and asked where it thought Victoria sat in comparison to other Australian tourism locations. Some key results were:

- Survey respondents felt that Victoria was on par with the rest of Australia (58 per cent), whilst 25 per cent thought we were somewhat ahead.
- Survey respondents felt that the top 3 barriers that inhibit the achievements of higher levels of professionalism were: 1) money and time to attend training, 2) lack of commitment by industry, 3) lack of awareness and access to relevant courses.
- Survey respondents identified the top 3 actions that have the potential to raise the level of professionalism as: 1) accreditation, 2) greater integration of industry (networks), 3) subsidised training (this contradicts evidence that even when subsidised training was offered in 2004, most programs were cancelled due to lack of numbers).
- Issues exist in the areas of attracting the right staff, providing career paths to retain staff, ensuring professional development tools such as training providers/educational programs are adapted to meet the needs of the changing environment, continually improving the business, identifying performance evaluation tools with which to assess your business, and how to truly measure the visitor experience.



The way forward

The success of the Tourism Excellence Strategy depends upon the active engagement and participation of individuals and businesses from all sectors of Victoria's tourism industry, from both our local and regional communities.

The strategy's implementation has been structured to allow industry to influence the direction of each module, by annually revisiting each module for a minimum of five years. Everyone will have the opportunity to provide input based on what has been learnt from the previous 12 months. Each year the review should expand the circle of engagement and encourage raising the bar higher.

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Tourism Industry Association Partners

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Australasian Spa Association (ASpa)
Australian Camps Association, Victoria (ACA)
Australian Hotels Association (AHA)
Backpacker Operators Association of Victoria (BOAV)
Boating Industry Association of Victoria Inc (BIA)
Caravan Industry Australia (CIA)
Clubs Victoria Inc. (CV)
Cultural Tourism Industry Group (CTIG)
Hospitality Sales & Marketing Association (HSMA)
Hotel Motel and Accommodation Association Victoria (HMAAV)
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