



Summary of Key Consumer Research Findings – Visitor Insights – Surveys 1 and 4



November 2022

STRICTLY CONFIDENTIAL



UNDERSTANDING THE DATA

Understating the data

SAMPLE SIZE

Robust

The sample size for this project is $n=1,155$. This gives a confidence level of $\pm 2.8\%$ at the 95% confidence interval.

This representative sample was made up of 385 adult respondents from each of Regional Victoria, Melbourne and NSW. This gives a confidence level of $\pm 4.9\%$ at the 95% confidence interval for each of these sub-samples.

Research participants come from an online permission based panel run by global research provider, Dynata.

ADDITIONAL DATA SOURCE

Visitor database from Yarra Valley Tourism

There were a total of $n=226$ respondents from the visitor database of Yarra Valley Tourism, who live outside the region, which results in a confidence level of $\pm 6.5\%$ at the 95% confidence interval.

ANALYSIS

The main analysis for this Report uses only the online panel sample from Dynata, as this best represents the market, as it is entirely representative and there is no inherent bias, unlike the highly engaged former or potential visitors from the YRT database.

Analysis of differences between these two sample sources is included at the end of the Report.

STATISTICALLY SIGNIFICANT DIFFERENCES

Reported at the 95% confidence level

All findings where there are differences are reported at the 95% confidence level. With this sample size there are sometimes differences that are statistically significant but not meaningful which are not reported.

RATINGS AND INDEXES

Ratings convert to an index

Some questions were asked on a rating of 0 to 10, this is useful but when comparing analysed groups can be difficult to understand. Ratings are either grouped into 'high' (9/10), 'medium' (7/8), and 'low' (0 to 6) or converted to an index which is a score from 0 to 100.

COLOURS IN TABLES

Blue above average and red below average

Some data is shown in tables with colour coding. In these red is above the average, black on the average, and red below average.

Analysis groups (Dynata panel sample)

		%	n
	NET	100	1155
Q2 Residential location	Melbourne	33	385
	Elsewhere in Victoria	33	385
	Sydney	22	257
	Elsewhere in NSW	11	128
Q17 Appeal of region	Appealing	66	763
	Not appealing	34	392
	Visited in last 5 years	45	516
Q4 Visited region	Visited more than 5 years ago	25	283
	Never visited	31	356
Q1 Age group	Under 35	24	279
	35 to 54	26	300
	55 to 70	26	306
	Over 70	23	270
Q38 Gender	Female	54	623
	Male	46	527
	Gender diverse / I'd rather not say	0	5

		%	n
Q39 Household income	Under \$50,000	34	389
	\$51,000-\$89,000	23	266
	\$90,000-\$110,000	12	141
	\$111,000-\$150,000	13	146
	\$151,000-\$200,000	7	82
	Over \$200,000	3	31
	I'd rather not say	9	100
Q40 Household structure	Solo household &-; never had children	13	152
	Couple- never had children	12	137
	Family with mainly pre-school aged children	7	81
	Family with mainly primary school aged children	7	86
	Family with mainly high school aged children	7	86
	Family with children who have left school	8	92
	Couple / Single all children left home	33	384
	Shared household	8	98
	Other / I'd rather not say	3	39



EXECUTIVE SUMMARY

Executive summary

MULTIPLE WAYS OF ARRIVING AT AN ANSWER

Looking at data in different ways

In this analysis there are often two ways of gaining insight. Interest in visiting the Yarra Valley & Dandenong Ranges region (the region) comes from answers to the questions:

- Would you consider visiting the region?
- Rating of interest in visiting the region
- Agreement with a statement that visiting the region for leisure is appealing

Experience preference comes from:

- Likelihood to travel for this experience
- Appeal of each experience

We use all these forms of input to better understand issues from multiple inputs.

UNDERSTANDING LOWER RATINGS

A broad-based tourism market has many elements

In the analysis some experiences, accommodation types and other elements have lower ratings but this does not mean that they will not be used by visitors.

A better way of thinking about this is that the most popular ones should be promoted and others will be discovered.

Executive summary

WHO HAS VISITED THE REGION

A significant amount of previous visitors

Only 31% of all respondents had never been to the region previously.

Not unsurprisingly, almost 60% of NSW residents have never visited, compared to 22% of Regional Victorian residents and only 12% of Melbournians.

In terms of the timing of the last visit, 45% of respondents had visited in the last 5 years while, the remaining 24% visited more than 5 years ago.

MORE DAY TRIPS THAN OVERNIGHT STAYS

The region is seen by many as a day trip destination

Of the 69% of respondents who had visited the region, only 47% of them stayed overnight.

Given the region's proximity to Melbourne, only one third of Melbourne residents stayed overnight in the region, with two thirds only visiting for a day trip.

The main reasons for this, in order, are as follows:

- 'I live close enough that I could get from home / where I was staying and back in one day'
- 'It was easier to just travel to the region for the day rather than stay overnight'
- 'Accommodation was too expensive'

Not unsurprisingly, when NSW residents visit the region they mainly stay overnight.

When visitors do stay overnight in the region, it tends to be for only very short periods.

Over 85% of visitors stay only between one and three nights.

Executive summary

THOSE MOST LIKELY TO VISIT THE REGION

Tourism is always broad-based

A tourism region will always attract a wide range of visitors from all backgrounds, however, the research shows that there are groups more likely to visit the region. This then becomes a lens for market development.

Those most likely to visit are:

- Past visitors
 - Almost all will consider another visit to the region
- Under 55 years of age
 - Over two-thirds of those aged under 35 (69%) have visited in the last 5 years. 47% of those aged 35 to 54 years have also visited in the last 5 years.
 - Older Australians are less likely to have visited in the last 5 years.
 - Visitors aged 55 or over are far less likely to have visited in the last 5 years.
- Skew to families with pre-school and primary school aged children
 - Families with pre-school kids (77%) and primary school kids (57%) are more likely to have visited the region in the last 5 years.

KEY DRIVERS WHICH APPEALED TO VISITORS

Exploration, nature, wineries and VFR are key reasons

Key reasons for visiting the region are:

- Just wanted to explore the region
- Explore nature (i.e. visit a State or National park, etc.)
- Visit wineries
- Visit family or friends
- Seek out places I had not been to before
- Visit the Healesville Sanctuary

There are some minor differences by where respondents live. For example, wineries are a far stronger drawcard for Sydney residents along with 'seeking out places I have not been to before'.

Regional Victorian and regional NSW residents are also more likely to be visiting friends and relatives.

Executive summary

WHAT MAY MAKE VISITORS STAY LONGER?

Clear winners and some surprises at the bottom

Of the 10 options that would potentially encourage visitors to stay longer in the region, there were some clear insights.

Those above the average are:

- Food and wine showcases from local producers (meet the winemaker / brewer / distiller evenings / dinners)
- Evening / night activities / experiences (sound and light shows or similar)
- Garden exhibits
- Night time events

The bottom 3 options were somewhat surprising, as follows:

- Indigenous experiences or education centres
- Network of off-road trails for active recreation
- World-class mountain bike trails

THOSE WHO DO VISIT ARE HIGHLY SATISFIED

The region overwhelmingly satisfies its visitors

88% of all visitors to the region are satisfied with their experience.

The most important reasons for visitor satisfaction are the natural beauty of the region, followed by 'great cafes and restaurants'.

Nature, scenery, open space, food and wine are therefore key drivers of visitor satisfaction.

The findings also show that very few (12%) visitors have a negative experience, which is an excellent result for the region.

Of the 12% who had a negative experience in the region the key reasons are:

- Weather
- Cost
- Lack of things to do.

Executive summary

HIGH SATISFACTION DOES NOT GUARANTEE ADVOCACY

Net Promoter Score (NPS) not incredibly high

The NPS score was 21 (i.e. Promoters minus Detractors).

Those most satisfied with their visit:

- Visited in last 5 years
- Women
- Couple who have never had children

However, families with pre-school kids and primary school kids also have a higher than average NPS.

ASPECTS THAT APPEAL TO VISITORS

More knowledge means potential visitors understand the rich experience the region offers

66% of respondents find the region appealing while the other 34% found the region not appealing.

Appeal is far higher for Victorian residents and lower for NSW residents. This should not discourage NSW marketing, as it simply shows that there is work to be undertaken to make NSW residents more aware of what the region has to offer.

Appeal is also far higher for those who have visited in the last 5 years, and for those aged both under 35 years and 35 to 54 years.

Appeal is higher for those with pre-school aged children and conversely lowest for 'couple / single all children left home' – who would also tend to be an older demographic.

No doubt key experiences such as the Healesville Sanctuary, Puffing Billy and the Yarra Valley Chocolaterie & Ice Creamery skew towards families with younger children.

Executive summary

ASPECTS THAT DO NOT APPEAL TO SOME VISITORS

You cannot appeal to everyone, but education will assist

The reasons the region is not appealing is due to a range of factors with no single barrier found to stand out.

Key differences by place of residence are:

- Melbourne residents are more likely to see region only as a day trip destination (40%)
- Regional Victorian residents are more likely to believe the region is expensive (26%)
- Sydney residents more likely to not know what the region has to offer (25%)
- Regional NSW residents more likely to feel it is too far away and hard to get to (23%)

ASPECTS THAT DO APPEAL TO SOME VISITORS

Highlights the key unique aspects the region has to offer

The reasons the region is appealing are very similar to the positive experiences of visitors.

Wonderful natural scenery and cafes and restaurants are the most important aspect of 'appeal'.

Melbourne residents are also more likely to mention:

- Wineries and cellar doors (41%)
- Easy to get to (43%)
- Unique shops and unique retail (31%)

Executive summary

WHAT DO LEISURE TRAVELLERS WANT?

Top 5 most important considerations & activities

Apart from the obvious No.1 'value for money' requirement, the next most important consideration is 'nature / natural beauty'. This is an excellent finding given that visitors to the region report this as the most compelling part of their visit and it is also the most important aspect of visitor 'appeal' for the region.

'Good food and wine' is the fourth most important aspect, which again is a key selling point in the region. However, indigenous experiences was rated the lowest all of holiday considerations.

Food and dining experiences is the No.1 activity for domestic leisure (56%) visitors. Other key elements are:

- Markets, shopping etc.
- Sightseeing – organised tours, tourism attractions etc.
- Social – visiting friends and relatives, etc.
- Outdoor and nature – hiking, bushwalking, walking, etc.
- Relaxing at a resort
- Wineries, wine tasting, winery tours etc.

Golf, cycling, mountain biking and other active or sporting pursuits are not in the vast majority of visitors Top 5 activities to undertake.

HOW DOES THE REGION RATE AMONGST COMPETITORS

The region is the No.1 Victorian regional destination

The Region is the top ranked destination for both residents of Melbourne and other areas of Victoria, which is an outstanding result against serious local competition.

The region it is still ranked relatively high for both Sydney residents and Regional NSW residents, and the region also ranks above any other Victorian region.

Executive summary

KEY DRIVERS AND BARRIERS TO LEISURE TRAVEL

It's all about needing a holiday but cost is a major issue

The biggest motivation for a holiday is simply 'needing a holiday' (47%)

The findings also show that we are in the post-Covid-19 environment where Australians are seeking to travel and are not as concerned with the pandemic.

At the same time there is a safety factor in domestic travel where becoming ill on holiday is mitigated by Australia's health care system, thus encouraging Australians to holiday more at home.

High cost of travel and lack of affordability are the biggest barriers to travel at present.

This factor also works well for Yarra Valley and Dandenong Ranges with the region being close to Melbourne and relatively easy access from most areas of the east coast of Australia.

TESTING THE APPEAL OF FOUR NEW EXPERIENCES

No outstanding candidates found

Respondents were shown four new potential experiences and asked how likely they were to travel for each, and their level of appeal.

The two experiences with slightly above average 'likely to travel' ratings are:

- Yarra Valley and Dandenong Ranges trails network
- Integrated Wine and Food centre of excellence

The rating for 'appeal' matches 'likely to travel' with the same experiences having more appeal though the 'top 2' switch their order.

- Integrated Wine and Food centre of excellence
- Yarra Valley and Dandenong Ranges trails network

The First Nations Cultural Centre had the lowest levels of 'likely to travel' and 'appeal', while the 'Light Up Yarra Valley and Dandenong Ranges' was third across all measures.

Is there a 'target market' for the region?

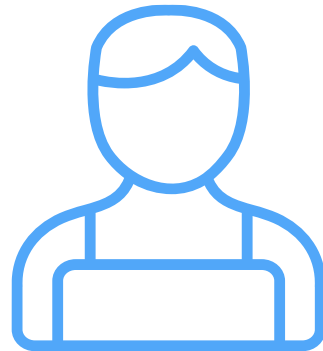
Yes and no...

A broad based leisure destination

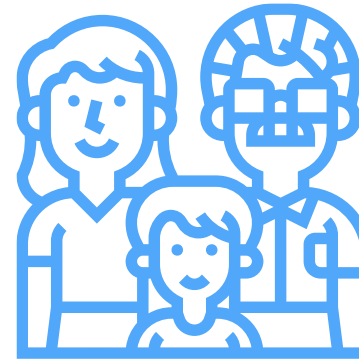
The range of activities and experiences to be found in the Yarra Valley and Dandenong Ranges region means that a specific 'target market' is limiting. However the findings are consistent in showing that there are groups that the region is *more* appealing to. When developing experiences, promotion and other communications materials, and thinking about the audience, the first question should perhaps be, 'how will it appeal to these groups?'.



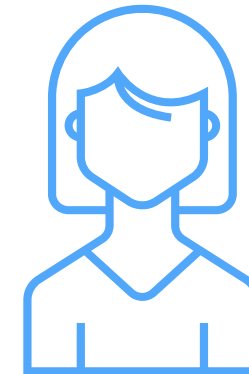
Repeat
visitors



Those under
54 years



Families



Women



KEY RESEARCH FINDINGS

Visits to Yarra Valley and Dandenong Ranges

Two thirds have visited

Few residents of Melbourne and other areas of Victoria have never visited the region.

However, even 42% of Sydney residents and 41% of those living in other areas of NSW have visited the region at some point in time previously.

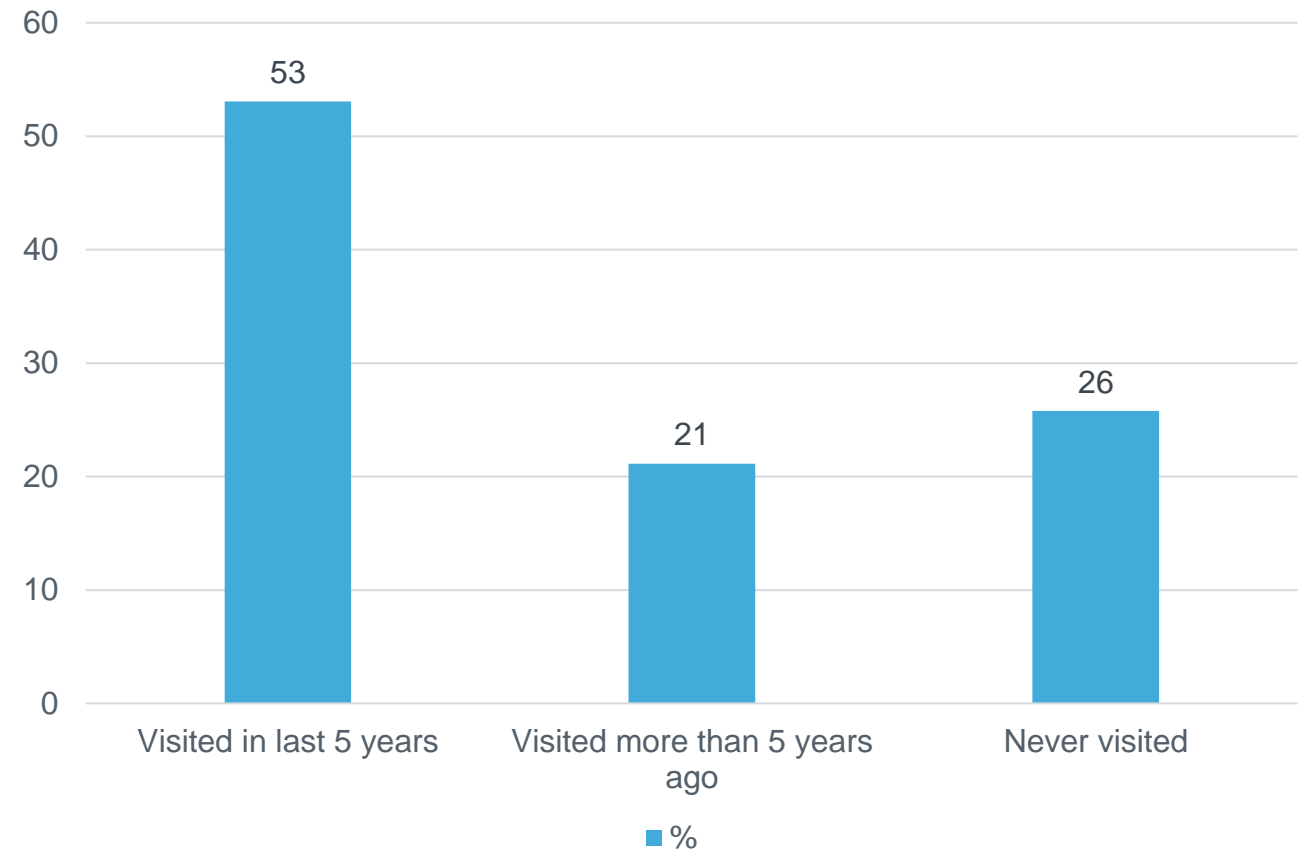
	NET	Melbourne	Elsewhere in Victoria	Sydney	Elsewhere in NSW
2022	17	30	16	6	5
2021	8	9	11	4	1
2020	6	7	6	4	5
2019	9	13	11	5	2
2018	5	4	6	3	5
Prior to 2018	25	25	27	19	24
I have never travelled to the Yarra Valley and Dandenong Ranges	31	12	22	58	59

Q4 When was the last time you travelled for a leisure visit (includes a day or overnight trip) to the Yarra Valley and Dandenong Ranges region?

Base: all research participants n=1,155

A simpler way of looking at the data

A better way of looking at the data is combining visits in the last 5 years, prior to this and never visited.



Q4 When was the last time you travelled for a leisure visit (includes a day or overnight trip) to the Yarra Valley and Dandenong Ranges region?

Base: all research participants $n=1,155$

Visits by residential area

Almost two-thirds (63%) of Melbourne residents and just over half (51%) of those living in Regional Victoria have visited the region in the last 5 years.

Recent visitors from NSW are fewer but still relatively high with 22% of Sydney residents and 17% of regional NSW residents visiting in the last 5 years.

	NET	Melbourne	Elsewhere in Victoria	Sydney	Elsewhere in NSW
Visited in last 5 years	45	63	51	22	17
Visited more than 5 years ago	25	25	27	19	24
Never visited	31	12	22	58	59

Q4 When was the last time you travelled for a leisure visit (includes a day or overnight trip) to the Yarra Valley and Dandenong Ranges region?

Base: all research participants $n=1,155$

Visits by age

Over two-thirds (69%) of those under 35 have visited in the last 5 years, while it is 47% of those aged 35 to 54 years.

Visitors aged 55 or over are far less likely to have visited in the last 5 years.

The region appeals more to those under 54 years of age.

	Under 35	35 to 54	55 to 70	Over 70
Visited in last 5 years	69	47	32	32
Visited more than 5 years ago	10	18	30	40
Never visited	21	35	38	28

Q4 When was the last time you travelled for a leisure visit (includes a day or overnight trip) to the Yarra Valley and Dandenong Ranges region?

Base: all research participants $n=1,155$

Visits by household makeup

Families with pre-school kids (77%) and primary school kids (57%) are more likely to have visited the region in the last 5 years.

	Solo household - never had children	Couple- never had children	Family with mainly pre-school aged children	Family with mainly primary school aged children	Family with mainly high school aged children	Family with children who have left school	Couple / Single all children left home	Shared household
Visited in last 5 years	44	50	77	57	53	38	34	40
Visited more than 5 years ago	28	18	10	14	21	23	34	19
Never visited	28	31	14	29	26	39	32	41

Q4 When was the last time you travelled for a leisure visit (includes a day or overnight trip) to the Yarra Valley and Dandenong Ranges region?

Base: all research participants n=1,155

Top 10 reasons for visiting the region

Key reasons for visiting the region are:

- Just wanted to explore the region
- Explore nature (i.e. visit a State or National park, etc.)
- Visit wineries
- Visit family or friends
- Seek out places I had not been to before
- Visit the Healesville Sanctuary

There are some minor differences by residential area, for example wineries being a far stronger drawcard for Sydney residents along with 'seeking out places I have not been to before'.

There are only minor differences by age and household makeup.

	NET	Melbourne	Elsewhere in Victoria	Sydney	Elsewhere in NSW
Just wanted to explore the region	35	33	35	35	40
Explore nature (i.e. visit a State or National park, etc.)	23	22	26	27	9
Visit wineries	21	23	15	32	13
Visit family or friends	21	15	27	17	28
Seek out places I had not been to before	17	17	11	26	26
Visit the Healesville Sanctuary	17	21	17	6	9
Visit a market	12	14	12	10	8
Yarra Valley Chocolaterie and Ice Creamery	12	14	12	12	6
Have a picnic	12	14	10	10	4
Undertake a Puffing Billy Railway experience	10	7	10	13	17

Q5 What were your main reasons for visiting the Yarra Valley and Dandenong Ranges region?

Base: those who have visited n=799

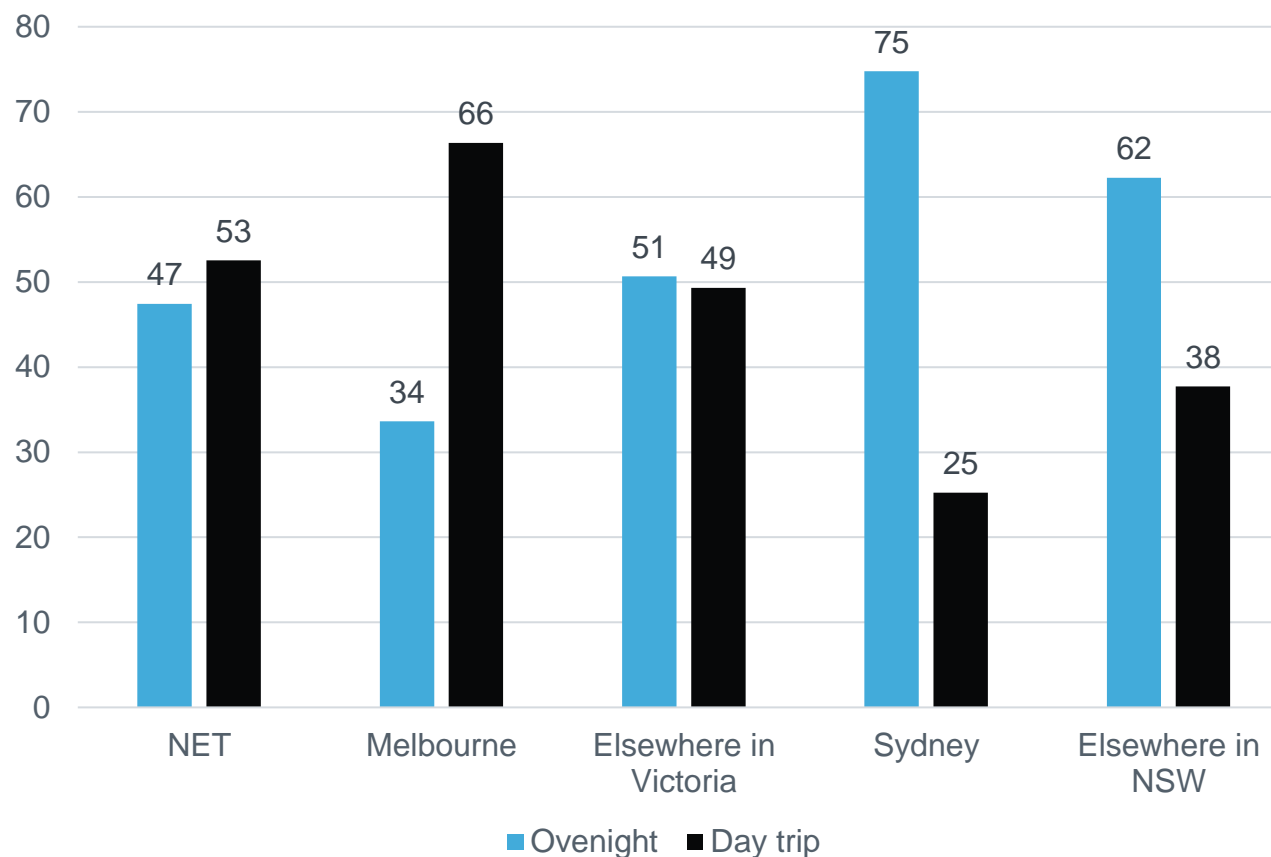
Day trip or overnight stay by residential area

About half have an overnight stay (47%) and a similar number (53%) visit as a day trip.

Given the proximity of the region to Melbourne, two thirds of Melbourne residents only visited for the day.

Overnight stays are much more common for visitors from Sydney (75%) and elsewhere in NSW (62%).

Interstate visitors are therefore much more likely to spend nights in the region, and as a result are a key target for future visitation and maximising visitor expenditure.



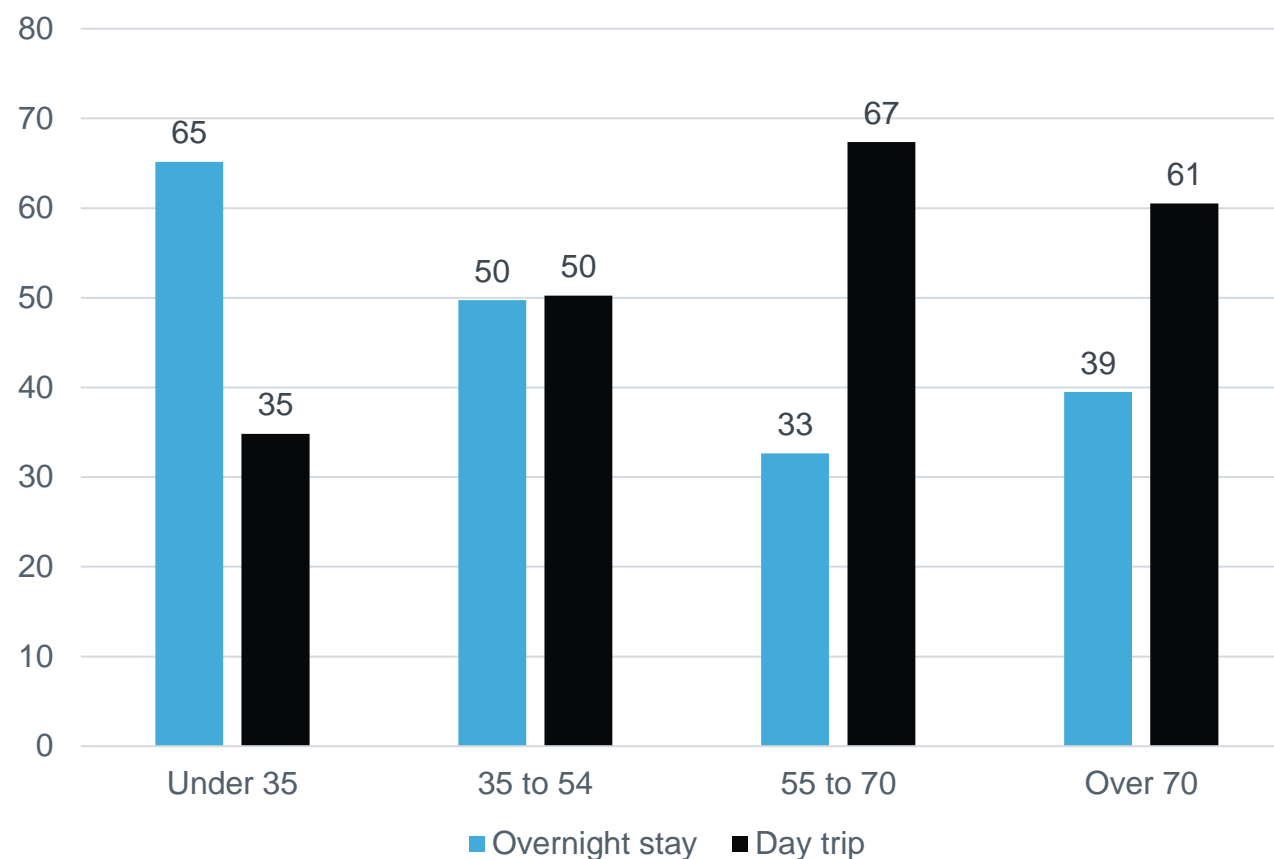
Q6 Did you spend at least one night away from home during your leisure visit to the Yarra Valley and Dandenong Ranges region?

Base: those who have visited $n=799$

Day trip or overnight stay by age

Overnight stays are far more common for those aged under 35 years (65%).

Older visitors are much less likely to stay overnight and only visit the region for the day.

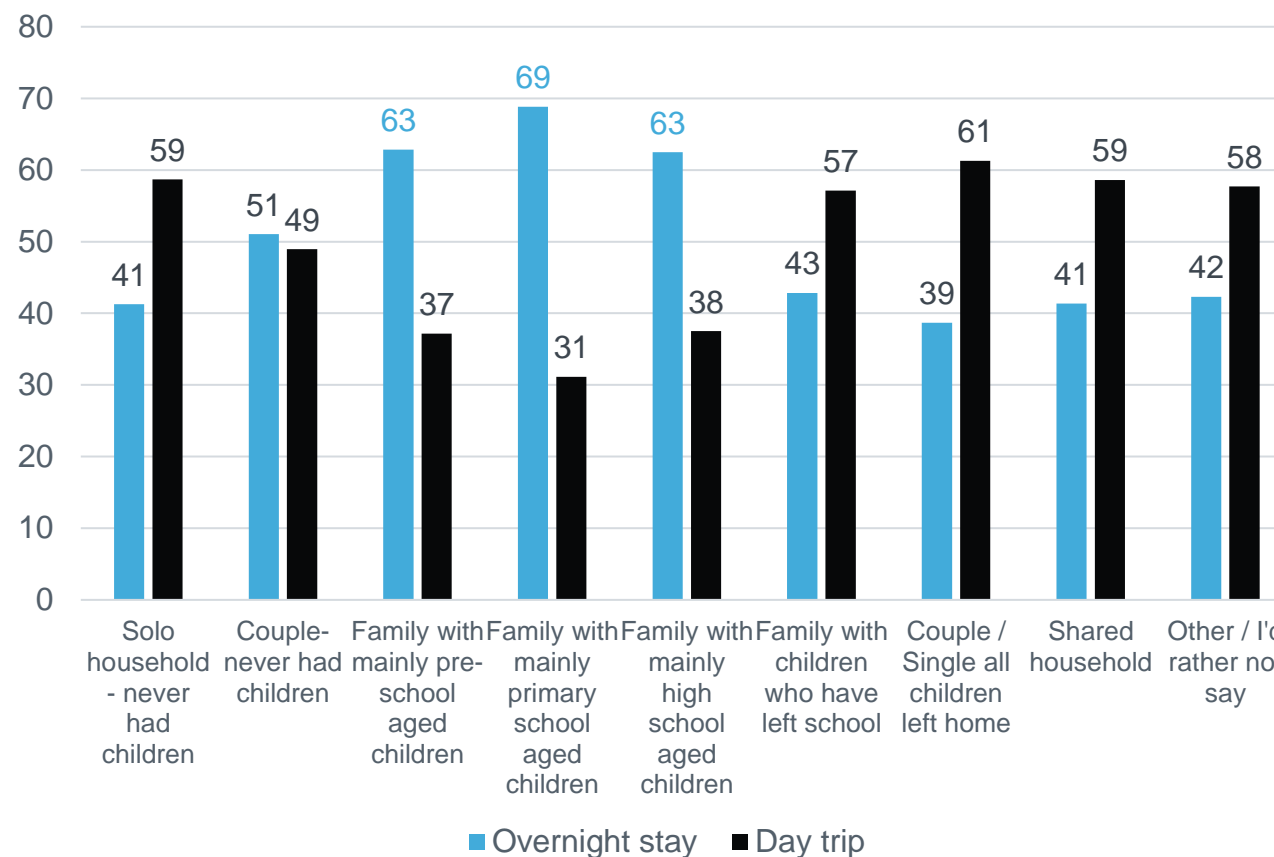


Q6 Did you spend at least one night away from home during your leisure visit to the Yarra Valley and Dandenong Ranges region?

Base: those who have visited $n=799$

Day trip or overnight stay by household makeup

Families with children of any age are far more likely to stay overnight.



Q6 Did you spend at least one night away from home during your leisure visit to the Yarra Valley and Dandenong Ranges region?

Base: those who have visited $n=799$

Why only a day-trip?

Visitors from Melbourne are more likely to undertake a day trip because they live close to the region. This is also a reason for not taking overnight stays for those who live outside of Melbourne.

We can assume this means that many of the Regional Victorian residents were staying in Melbourne and only visited for the day.

	NET	Melbourne	Elsewhere in Victoria	Sydney	Elsewhere in NSW
I live close enough that I could get from home / where I was staying and back in one day	50	56	47	33	35
It was easier to just travel to Yarra Valley and Dandenong Ranges region for the day rather than stay overnight	36	38	36	30	25
Accommodation was too expensive	16	15	20	7	15
I chose to stay overnight outside of the Yarra Valley and Dandenong Ranges region	4	1	2	15	25
I was unsure where to search for accommodation options could not find accommodation in the location I wanted	3	2	1	7	15
Could not find suitable accommodation	3	2	5	0	0

Q7 Why did you only stay for the day in Yarra Valley and Dandenong Ranges region?

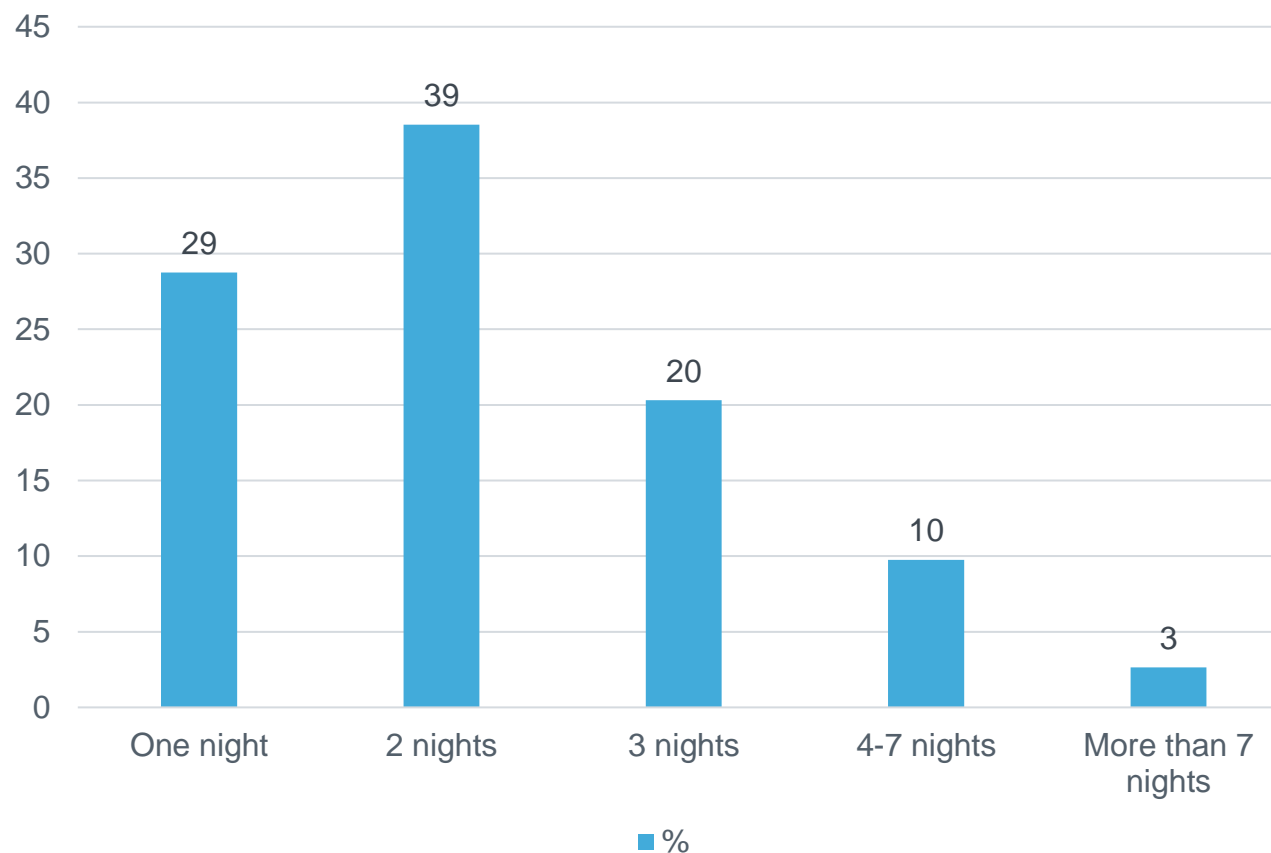
Bae: those who visited region and did not stay overnight $n=420$

Days stayed overnight

When visitors have chosen to stay overnight there is no difference across the analysed groups.

The most common stay is for 2 nights (39%) followed by one night (29%) and three nights (20%).

There is certainly an opportunity to encourage visitors to stay longer in the region.



Q8 How many nights did you spend in the Yarra Valley and Dandenong Ranges region when you last visited?

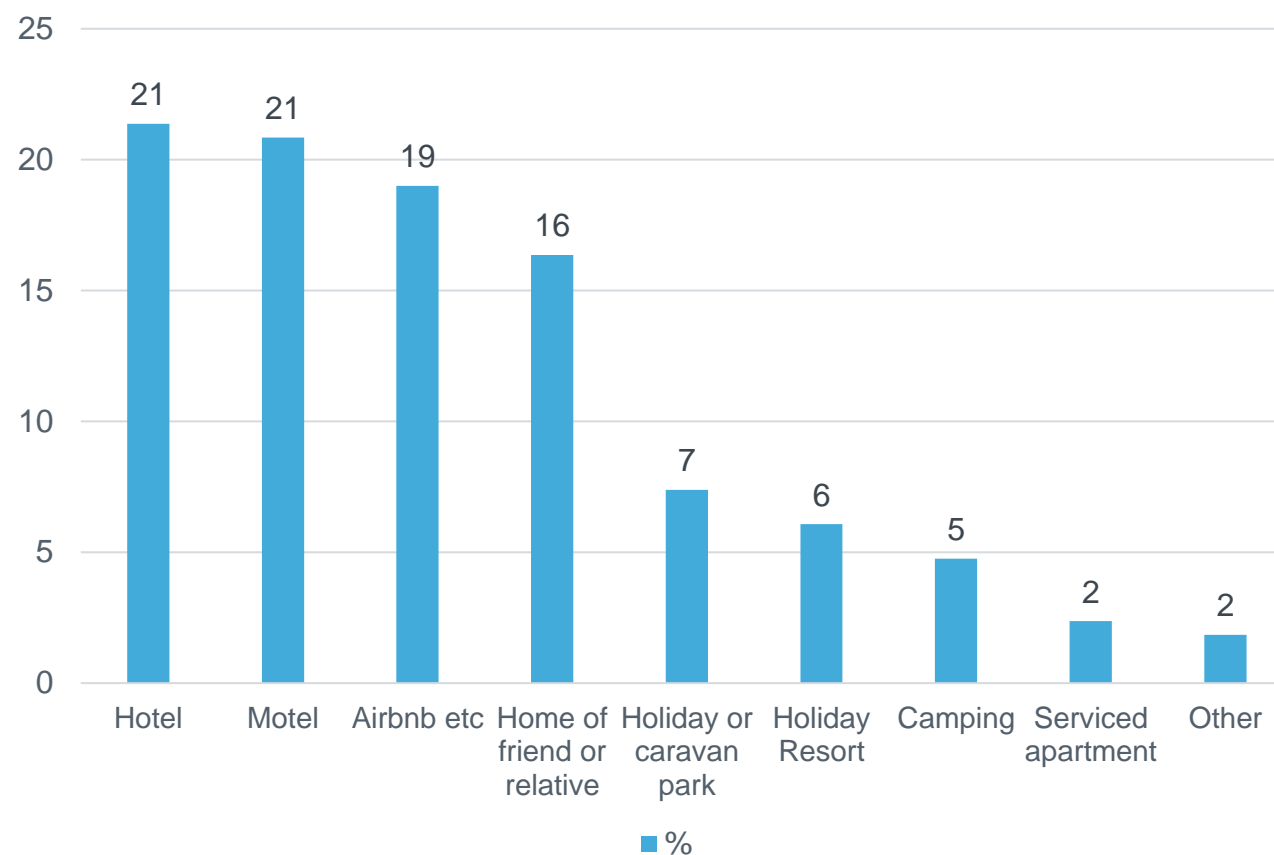
Base: those who had an overnight stay $n=379$

Accommodation type

Accommodation type also has little difference by analysed groups.

The most common forms of accommodation are:

- Hotels
- Motels
- Airbnb and other similar types of accommodation
- Home of a friend or relative



Q10 What type of accommodation did you stay in during your visit to the Yarra Valley and Dandenong Ranges region?

Base: those who had an overnight stay $n=379$

What would make visitors stay longer in the region?

Research participants were given 10 options that would potentially encourage them to stay longer.

Those above the average are:

- Food and wine showcases from local producers (meet the winemaker / brewer / distiller evenings / dinners)
- Evening / night activities / experiences (sound and light shows or similar)
- Garden exhibits
- Night time events

Food and wine events is interesting given that wine is a key reason for Sydney residents to visit the region.

	%		%
Food and wine showcases from local producers (Meet the winemaker / brewer / distiller evenings / dinners)	37	Art installations, exhibition and experiences	17
Evening / night activities / experiences (sound and light shows or similar)	27	Indigenous experiences or education centres	11
Garden exhibits	24	Network of off-road trails for active recreation	9
Night time events	23	World-class mountain bike trails	4
More family attractions	20	Other	3
Wellness resorts or experiences (spas, meditation retreats, forest therapy, nature experiences)	20	Don't know	22

Q11 What other experiences / attractions would potentially make you stay longer or visit the Yarra Valley and Dandenong Ranges region again?

Base: those who had an overnight stay n=379

What would make visitors stay longer in the region?

This analysis shows the experiences and attractions that would make visitors stay longer by those who have visited in the last 5 years v. those who visited longer ago.

Almost all of the experiences and events are more motivating for more recent visitors. This shows that a key target market for these experiences and attractions is to focus on recent visitors to the region.

	Visited in last 5 years	Visited more than 5 years ago
Food and wine showcases from local producers (Meet the winemaker / brewer / distiller evenings / dinners)	43	26
Evening / night activities / experiences (sounds and light shows or similar)	31	20
Garden exhibits	26	21
Night time events	28	14
More family attractions	24	14
Wellness resorts or experiences (spas, meditation retreats, forest therapy, nature experiences)	25	11
Art installations, exhibition and experiences	20	12
Indigenous experiences or education centres	12	8
Network of off-road trails for active recreation	11	5
World-class mountain bike trails	6	1
Other	2	5
Don't know	13	39

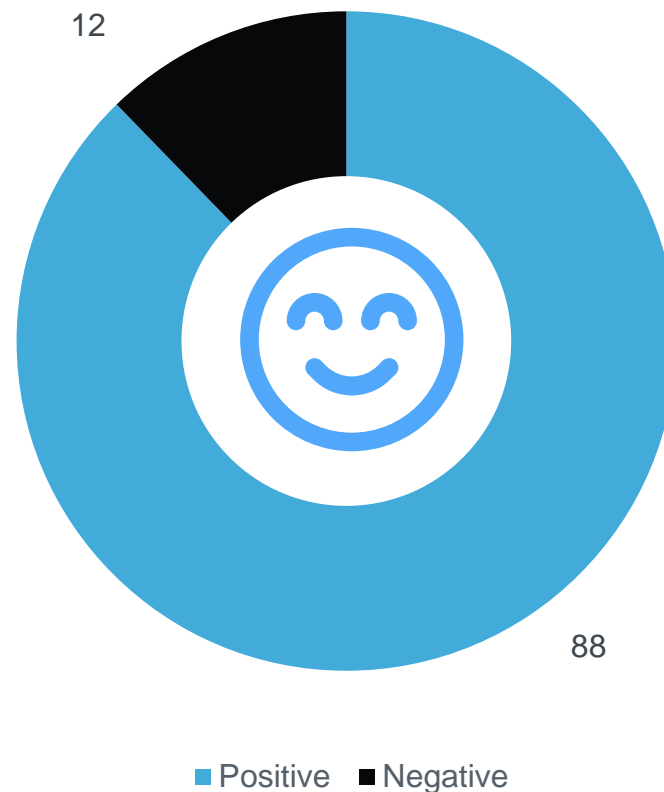
Q11 What other experiences / attractions would potentially make you stay longer or visit the Yarra Valley and Dandenong Ranges region again?

Base: those who had an overnight stay n=379

Satisfaction with visit

Satisfaction with their visit was rated on a 0 to 10 scale. For simplicity this has been grouped into negative (rating of 0 to 5) and positive (rating of 6 to 10).

The findings show that few (12%) visitors have a negative experience, which is an excellent result for the region.



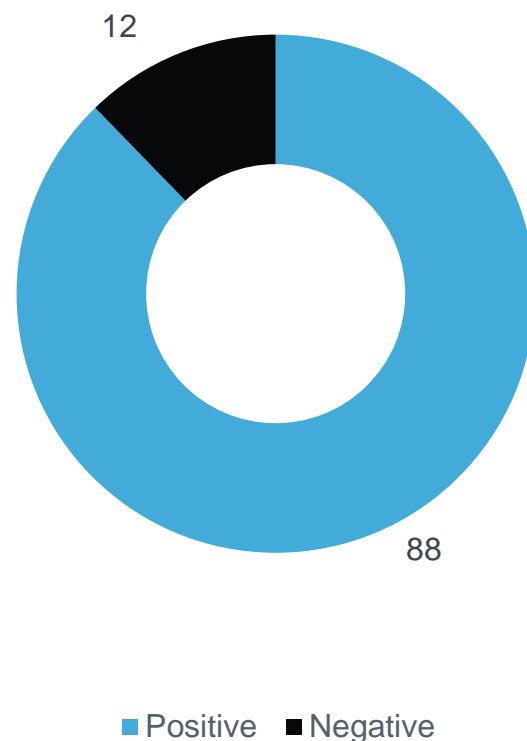
Q12 Satisfaction with visit

Base: those who had an overnight stay $n=379$

Reasons for dissatisfaction

Of the 12% who had a negative experience in the region the key reasons are:

- Weather
- Cost
- Lack of things to do.



	%
Weather	21
Everything was expensive	21
Nothing much to do	15
It is simply too big an area to explore properly	12
Too remote	9
I did not know what to visit or where to go	9
Not enough accommodation, or the type I was after	7
The places I wanted to go to were booked out	6
Lack of public transport options	6
Many businesses were closed	6
The quality of the food and/or wine	6

Q12 Negative experiences

Base: those who had an overnight stay and were dissatisfied with their visit $n=98$

Positive experiences

For the 88% of visitors who had a positive experience in the region, there are many reasons that made their experience positive.

The most important of these are the natural beauty of the region followed by 'great cafes and restaurants'.

Nature, scenery, space, food and wine are therefore key drivers of visitor satisfaction.

	%
The natural beauty is incredible	57
Great cafes and restaurants	45
Lots of open space, lack of crowds and felt like an escape	37
Easy to get around, little traffic	36
Friendliness of locals	33
There is so much to do and see	32
Weather	30
Great wineries and cellar doors	28
Excellent and unique places to shop	23
Great quality of service	22
I could undertake adventure activities I like (bushwalking, hiking, running, fishing etc.) other than mountain biking or cycling	18
Lots of paid and/or free activities that I enjoy	15
I could undertake a range of cultural activities (i.e. markets, museums, galleries etc.)	13
Unique indigenous experiences	4
Cycling	4
Mountain biking	2
Other	3

Q14 Positive experiences

Base: those who had an overnight stay and were satisfied with their visit n=701

Net promoter score (NPS)

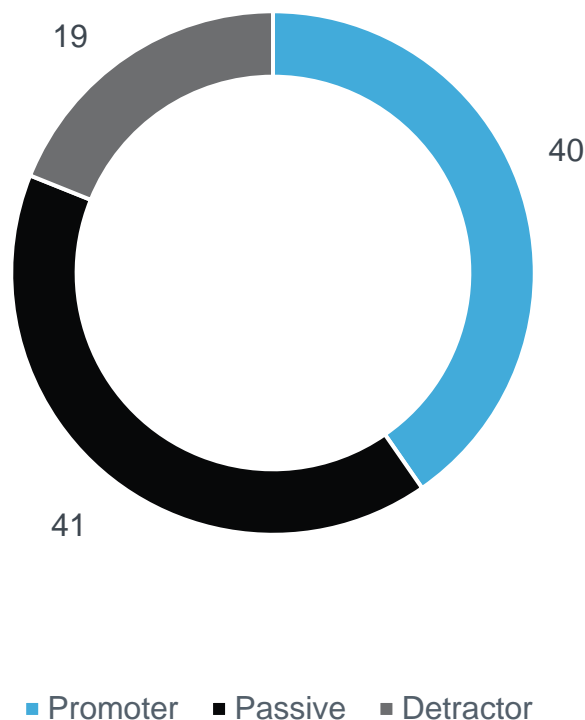
The Net Promoter Score (NPS) shows differences by analysed groups. Blue is above average and red below average.

The NPS score was 21 (i.e. Promoters minus Detractors).

Those most satisfied with their visit:

- Visited in last 5 years
- Women
- Couple who have never had children

However, families with pre-school kids and primary school kids also have a higher than average NPS.



NPS

- All visitors 21.4
- Visited in last 5 years 33.2
- Visited longer ago 0
- Women 28
- Men 12.6
- Couple never had children 36.2
- Families with pre-school kids 31.4
- Families with primary school kids 36.7

Q15 Yarra Valley and Dandenong Ranges NPS
Base: all those who have visited region n=798

Awareness of the region's key experiences

Over 50% of all respondents are aware of the Puffing Billy Train experience and the Healesville Sanctuary, however the rates of awareness are far higher for Victorian residents than NSW residents.

'Wineries and cellar doors' and 'State and National Parks' are the next most known activities in the region, again with far higher awareness levels by Victorian residents, although 'wineries and cellar doors' are far more known by Melbourne residents than Regional Victorian residents.

Given the quality of the region's mountain bike trails, the levels of awareness of this experience, particularly by Victorian residents, is somewhat concerning and an area which perhaps is in need of significant promotion, if it is to become a key focal point for the region.

	NET
Puffing Billy Train experience	58
Healesville Sanctuary	53
Wineries & cellar doors	41
State and National Parks	37
Walking and hiking trails	32
Yarra Valley Chocolaterie and Ice Creamery	32
Gumbaya World	31
Sky High Mount Dandenong	25
Lake Alpine Resort	17
Mountain Bike Trails	13
Diamond Valley Miniature Railway	13
Art Centre	9
Tarrawarra Museum of Art	9
None of these	19

Q16 Are you aware of any of these Yarra Valley and Dandenong Ranges experiences?

Base: all research participants n=1,155

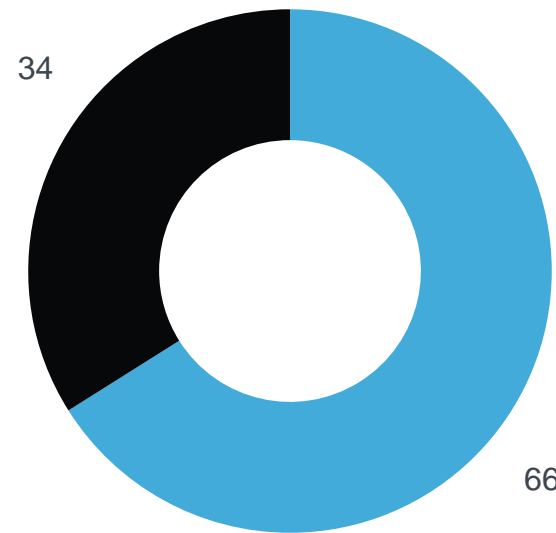
Appeal of the Yarra Valley and Dandenong Ranges

Overall appeal of the region was rated on a 0 to 10 scale. For simplicity this has been grouped into negative (rating of 0 to 5) and positive (rating of 6 to 10).

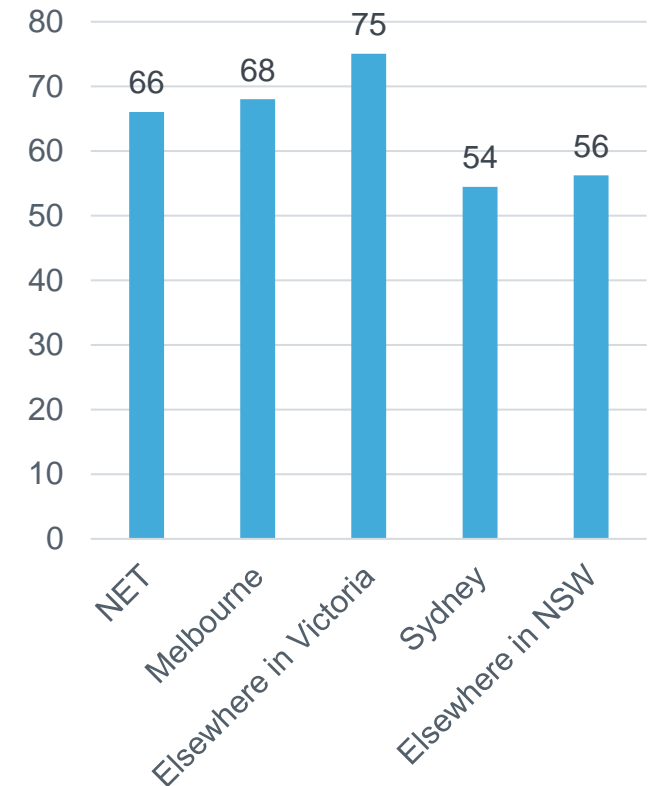
66% of respondents find the region appealing and 34% not appealing.

Appeal is far higher for Victorian residents and lower for NSW residents.

This should not discourage NSW marketing, as it simply shows that there is work to be completed in making NSW residents more aware of the region. We also know the NSW residents are more likely to stay overnight, stay longer and spend more money on average than Victorian residents.



■ Appealing ■ Not appealing



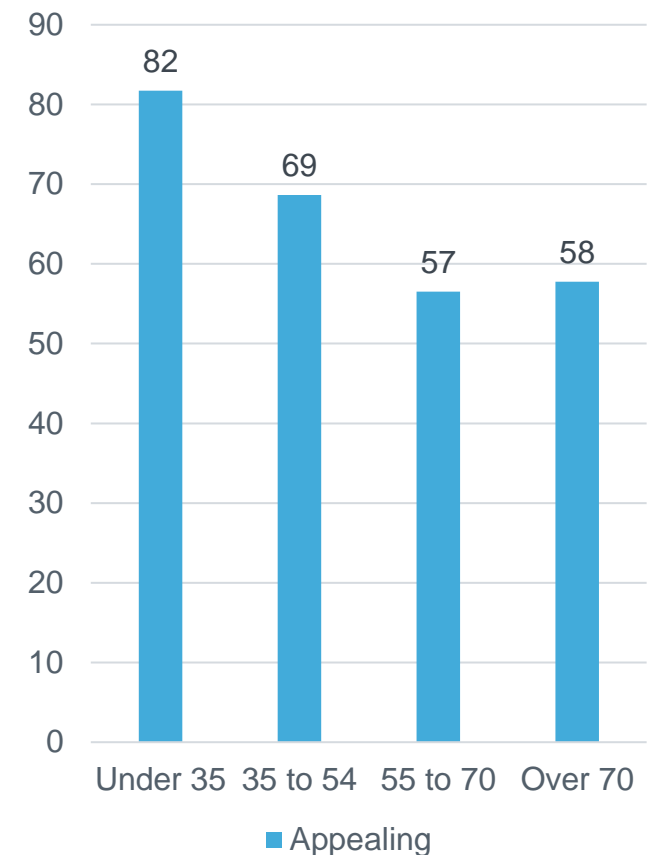
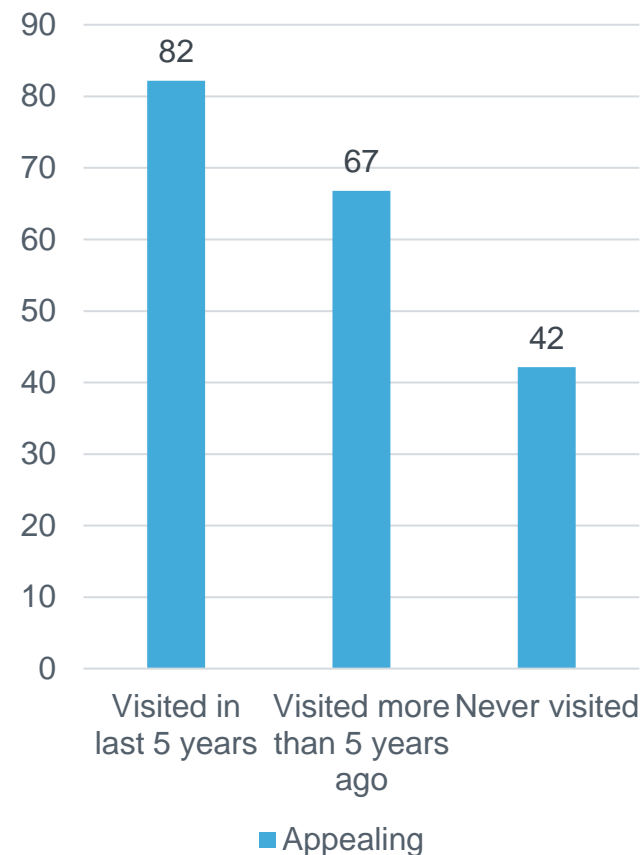
■ Appealing

Q17 How do you rate your agreement with this statement? "The Yarra Valley and Dandenong Ranges region is a destination that appeals to me as an overnight leisure visit destination"

Base: all research participants n=1,155

Appeal of the Yarra Valley and Dandenong Ranges

Appeal is far higher for those who have visited in the last 5 years and those aged under 35 years and 35 to 54 years.



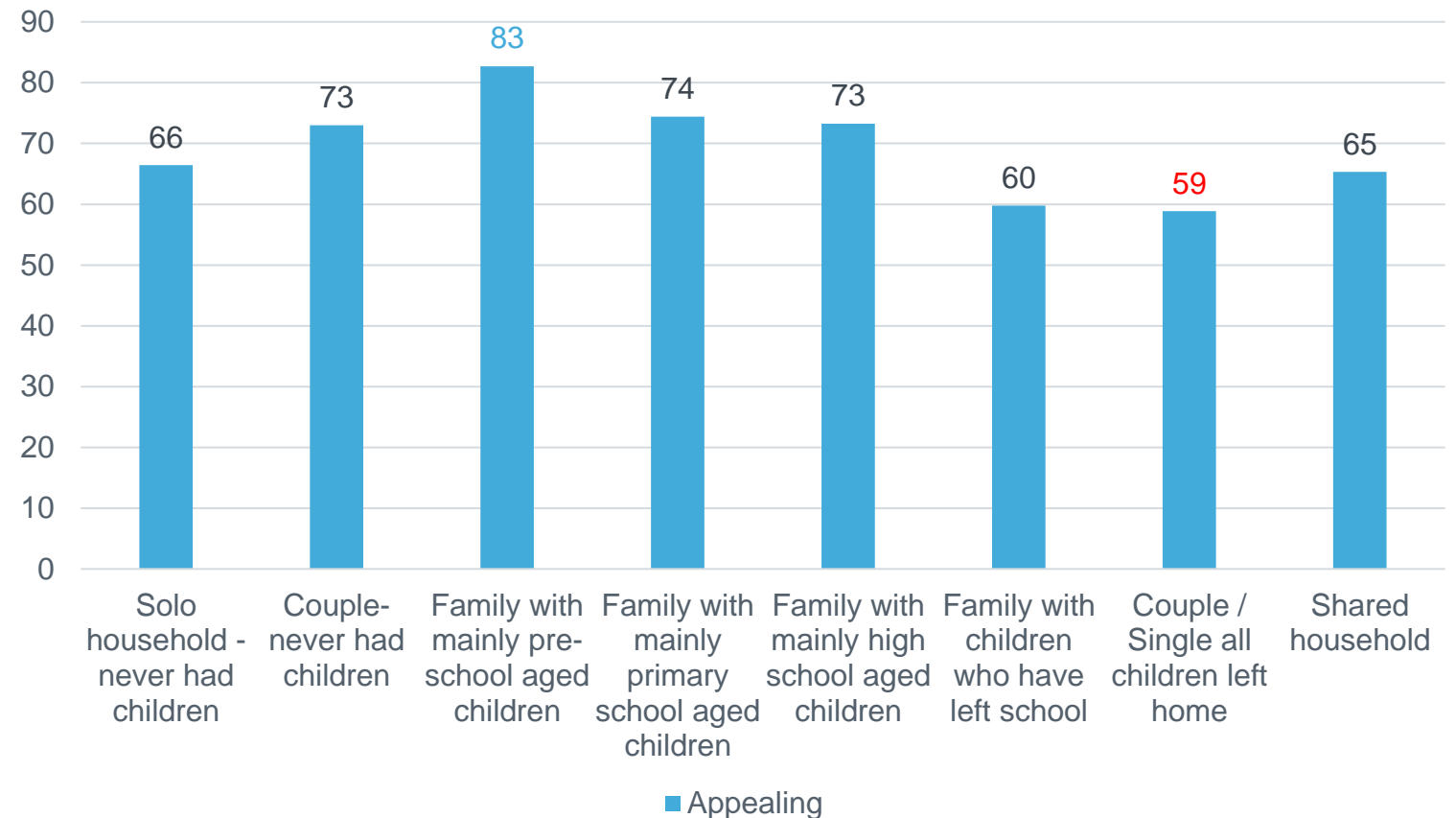
Q17 How do you rate your agreement with this statement? "The Yarra Valley and Dandenong Ranges region is a destination that appeals to me as an overnight leisure visit destination"

Base: all research participants $n=1,155$

Appeal of the Yarra Valley and Dandenong Ranges

Appeal is higher for those with pre-school aged children and conversely lowest for 'couple / single all children left home'.

This group is likely to be older, so this supports the findings for age.



Q17 How do you rate your agreement with this statement? "The Yarra Valley and Dandenong Ranges region is a destination that appeals to me as an overnight leisure visit destination"

Base: all research participants $n=1,155$

Reasons why the Yarra Valley and Dandenong Ranges does not appeal

The reasons the region is not appealing range is to due a range of factors with no single barrier found to stand out in the research.

Differences by region are:

- Melbourne residents are more likely to see region only as a day-trip (40%)
- Regional Victorian residents are more likely to believe the region is expensive (26%)
- Sydney residents more likely to not know what the region has to offer (25%)
- Regional NSW residents more likely to feel it is too far away and hard to get to (23%)

Of all these findings the results for Sydney are most interesting with a quarter of those who do not find the region appealing only needing more information on what there is to see and do.

	%
It is just not on my list of potential holiday destinations	27
It is too far away and hard to get to	23
It is only a day trip destination	19
It is too expensive	18
There are other destinations I would prefer to go to before visiting there, but I would like to go some day	17
I prefer coastal holiday destinations	14
It does not offer the type of activities I like to do	8
It is too remote	8
Nothing much to do	8
Climate does not appeal	6
It is too overwhelming to organise a holiday there	4
It is not a destination for families	2
I do not know what experiences it has to offer	14
Other	9

Q18 Why doesn't the Yarra Valley and Dandenong Ranges region appeal to you as an overnight leisure visit destination?

Base: those rating 0 to 5 in Q17 n=392

Why the Yarra Valley and Dandenong Ranges appeals

The reasons the region is appealing are very similar to the positive experiences of visitors.

Great scenery and cafes and restaurants are the most important aspect of 'appeal'.

- Melbourne residents are more likely to mention
 - Wineries and cellar doors (41%)
 - Easy to get to (43%)
 - Unique shops and unique retail (31%)

	%
The natural scenery and sights are fantastic	53
Great cafes and restaurants	45
I like open space, lack of crowds and a place to escape	41
There is so much to see and do	37
Wonderful wineries and cellar doors	35
It is easy to get around	35
It is easily accessible and easy to get to	34
I really like exploring new and unique destinations like this	33
Lots of activities that I enjoy	30
I could undertake a range of cultural activities (i.e. markets, museums, galleries etc.)	30
Unique shops and retail offerings	26
I could undertake adventure activities I like (bush walking, hiking, running, fishing etc.) other than mountain biking or cycling	23
It is a 'bucket list' experience I have always wanted to do	10
I could undertake unique indigenous experiences	8
Mountain biking	5
Cycling	4
Other	1

Q19 What specifically appeals to you about the Yarra Valley and Dandenong Ranges region as an overnight leisure holiday destination?

Base: those rating destination as 6 to 10 in Q17 *n*=763

Top 5 domestic holiday considerations

Apart from the obvious 'value for money' requirement, the next most important consideration is 'nature / natural beauty'.

This is an excellent finding given that visitors to the region report this as the most compelling part of their visit and it is also the most important aspect of visitor 'appeal' for the region.

'Good food and wine' is the fourth most important aspect, which again is a key selling point in the region.

Indigenous experiences was rated the lowest of all of holiday considerations.

	%		%
Value for money	61	History and heritage	23
Nature / natural beauty	42	Family friendly	21
Quality accommodation	38	Friendly locals	18
Good food and wine	38	Shopping	16
Safety and security	31	Remoteness / getting away from it / uncrowded	15
A range of tourist attractions	30	Bushwalking / walking / hiking trails	15
Water, coastal or pristine beaches	26	Access to State or National parks	12
A range of unique experiences	25	Sports and adventure options	6
Wildlife	23	Indigenous experiences	5

Q28 Which of the following factors do you consider are your Top 5 considerations when selecting a domestic [INTRASTATE/INTERSTATE] leisure destination?

Base: all research participants n=1,155

Top 5 activities for domestic leisure travel

Food and dining experiences is the No. 1 activity for domestic leisure (56%) visitors.

Other key elements are:

- Markets, shopping etc.
- Sightseeing – organised tours, tourism attractions etc.
- Social – visiting friends and relatives, etc.
- Outdoor and nature – hiking, bushwalking, walking, etc.
- Relaxing at a resort
- Wineries, wine tasting, winery tours etc.

Golf, cycling, mountain biking and other active or sporting pursuits are not in the vast majority of visitors' Top % activities to undertaken on a domestic leisure trip.

	%		%
Dining out, restaurants, food experiences etc.	56	Theme parks	9
Markets, shopping etc.	45	Fishing	7
Sightseeing – organised tours, tourism attractions etc.	45	Spectator – attend major sporting events	7
Social – visiting friends and relatives, etc.	40	Music concerts or festivals	7
Outdoor and nature – hiking, bushwalking, walking, etc.	34	Indigenous experiences	6
Relaxing at a resort	26	Participant events – organised active sporting events	4
Wineries, wine tasting, winery tours etc.	25	Golfing	3
Family activities	21	Cycling	2
Arts & cultural activities – theatre, ballet, symphonies, museums, art galleries etc.	15	Mountain biking	2
Wellness – massage, day spa, etc.	15	Other active or sporting pursuits	4
Ocean or inland water-based activities (surfing, paddleboarding, swimming, etc.)	14	Other	3

Q35 Which of these activities do you normally prioritise during your leisure visits.

Base: all research participants n=1,155

Top 5 destination types for leisure travel

It is not surprising that the most popular destinations are 'beach /costal destinations' (55%).

The region is obviously not on the coast, however, it does clearly deliver on the next three most popular destination types:

- Food and wine region
- Historic / heritage
- Nature focused

	%
Beach / coastal destinations	55
Food and wine regions	38
Historic / heritage destinations	37
Nature focussed destinations (e.g., State or National parks)	36
Capital cities	31
Inland rivers and lakes	27
Reef / island destinations	21
Remote wilderness areas	20
Arts & cultural destinations	19
Theme park destinations	16
Snow / skiing destinations	7
Other destinations	9

What type of destinations do you primarily travel to for domestic leisure visit purposes?

Base: all research participants $n=1,155$

Top 5 destination types for leisure travel by region appearing or not appealing

Those who find the region appealing also find almost every type of destination more appealing.

This speaks to the type of visitor that the Yarra Valley and Dandenong Ranges will appeal to:

- Seeking new experiences
- Looking for interesting and engaging domestic locations
- Engaged by nature and natural beauty

	Appealing	Not appealing
Beach / coastal destinations	58	50
Food and wine regions	46	22
Historic / heritage destinations	40	31
Nature focussed destinations (e.g. State or National parks)	42	23
Capital cities	32	29
Inland rivers and lakes	31	19
Reef / island destinations	23	17
Remote wilderness areas	24	11
Arts & cultural destinations	22	13
Theme park destinations	18	11
Snow / skiing destinations	8	5
Other destinations	5	16

What type of destinations do you primarily travel to for domestic leisure visit purposes?

Base: all research participants $n=1,155$

Motivations for leisure travel

The biggest motivation for a holiday is simply needing a holiday (47%) which becomes 50% for those who find the region appealing.

The findings also show that we are in the post-Covid-19 environment where Australians are seeking to travel and are not as concerned with the pandemic.

At the same time there is a safety factor in domestic travel where becoming ill on a holiday is mitigated by Australia's health care system, thus encouraging Australians to holiday more at home.

	NET	Appealing	Not appealing
I just really need a holiday	47	50	40
Australia is relatively safe to travel in and I will have access to high quality medical care should I fall ill	38	42	29
I want to visit friends or family	32	33	32
It is now possible to travel giving the easing of COVID-19 restrictions	27	31	18
COVID-19 is no longer a major concern for me	21	22	17
I would not feel safe travelling overseas at present due to COVID-19	18	18	17
There are some excellent travel deals at present	15	18	11
I am frustrated by COVID-19 and need to travel again	11	13	8
I have saved up money during COVID-19 and want to spend it on travel	8	10	4
I have excess annual leave and need to use some	7	8	5
I need to use travel refunds / vouchers I was unable to use during COVID-19	4	5	3
Other	5	2	9

Q31 What are your key motivations for wanting to travel within Australia for leisure visit purposes?

Base: all research participants n=1,155

Barriers to domestic leisure travel

High cost of travel and lack of affordability are the biggest barriers to travel.

This works well for Yarra Valley and Dandenong Ranges with the region being close to Melbourne and easy access from most areas of the east coast of Australia.

	%
High cost of travel at present	48
I cannot afford to travel at present	30
I am not thinking about travelling at present	21
COVID-19 restrictions can be implemented at any time and may impact my travel	15
COVID-19 is a major concern for me generally	14
The places I wish to travel to are booked up	13
I do not have enough annual leave	9
The destination appears difficult or overwhelming to organise a trip	8
I will be unlikely to receive a refund due to border closures / COVID-19	8
I am unable to use travel refunds / vouchers I received due to COVID-19	4
Other	8

Q32 What are the key barriers which may prevent you travelling in Australia for leisure visit purposes?

Base: all research participants n=1,155

Ranking of similar regional destinations

The Region is the top ranked destination for both residents of Melbourne and other areas of Victoria, which is an outstanding result against serious competition.

However, the region it is still ranked relatively high for both Sydney residents and Regional NSW residents, and is rated above any other Victorian region.

Competing regions for both Sydney and Regional NSW residents are the Barossa, Margaret River and the Hunter Valley.

	NET	Melbourne	Elsewhere in Victoria	Sydney	Elsewhere in NSW
Yarra Valley and the Dandenong Ranges	9.3	9.8	9.8	8.3	8.2
Mornington Peninsula	8.8	9.6	9.1	7.7	7.8
The Barossa	8.1	7.8	8.0	8.7	8.7
Daylesford & Macedon Ranges	8.1	9.3	8.8	6.1	6.5
Margaret River	8.1	7.6	7.7	9.0	9.2
Geelong and the Bellarine Peninsula	8.0	8.7	8.5	6.7	7.1
Hunter Valley	8.0	6.8	7.4	9.9	9.4
Bright and Rutherglen region	7.7	8.5	8.5	5.9	6.8
Ballarat and Bendigo region	7.6	8.3	7.5	6.9	7.4
Adelaide Hills	7.5	6.9	7.7	7.6	7.9
Clare Valley	6.3	5.8	6.1	7.1	6.9
McClaren Vale	6.1	5.9	5.8	6.8	6.4
Coonawarra	5.9	5.7	5.7	6.4	5.7
Mudgee	5.4	4.3	4.3	7.7	7.0

Q37 Please rank the following regional destinations in terms of appeal as a leisure visit destination – higher number the more appealing

Base: all research participants n=1,155

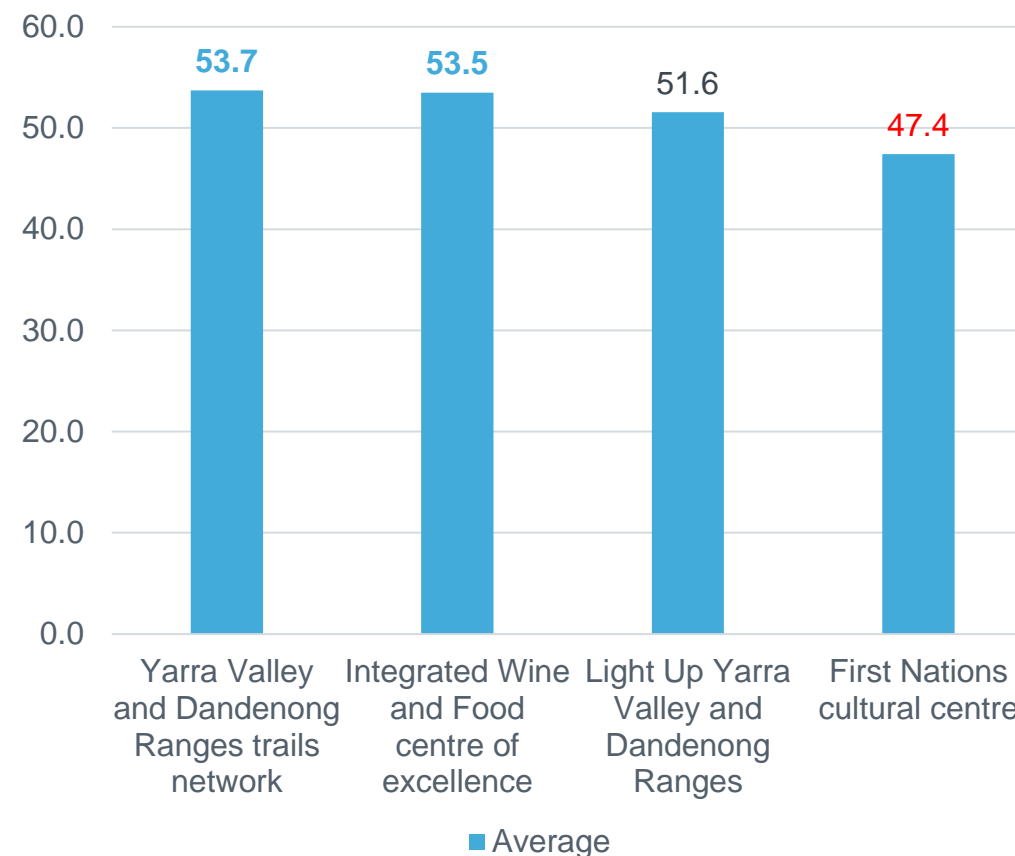
Experiences – Likely to travel (index)

Respondents were shown four experiences and asked how likely they were to travel for each and their level of appeal.

This was rated on 0 to 10 scale which has been converted to an index (score from 0 to 100) for this report.

The two experiences with slightly above average 'likely to travel' ratings are:

- Yarra Valley and Dandenong Ranges trails network
- Integrated Wine and Food centre of excellence

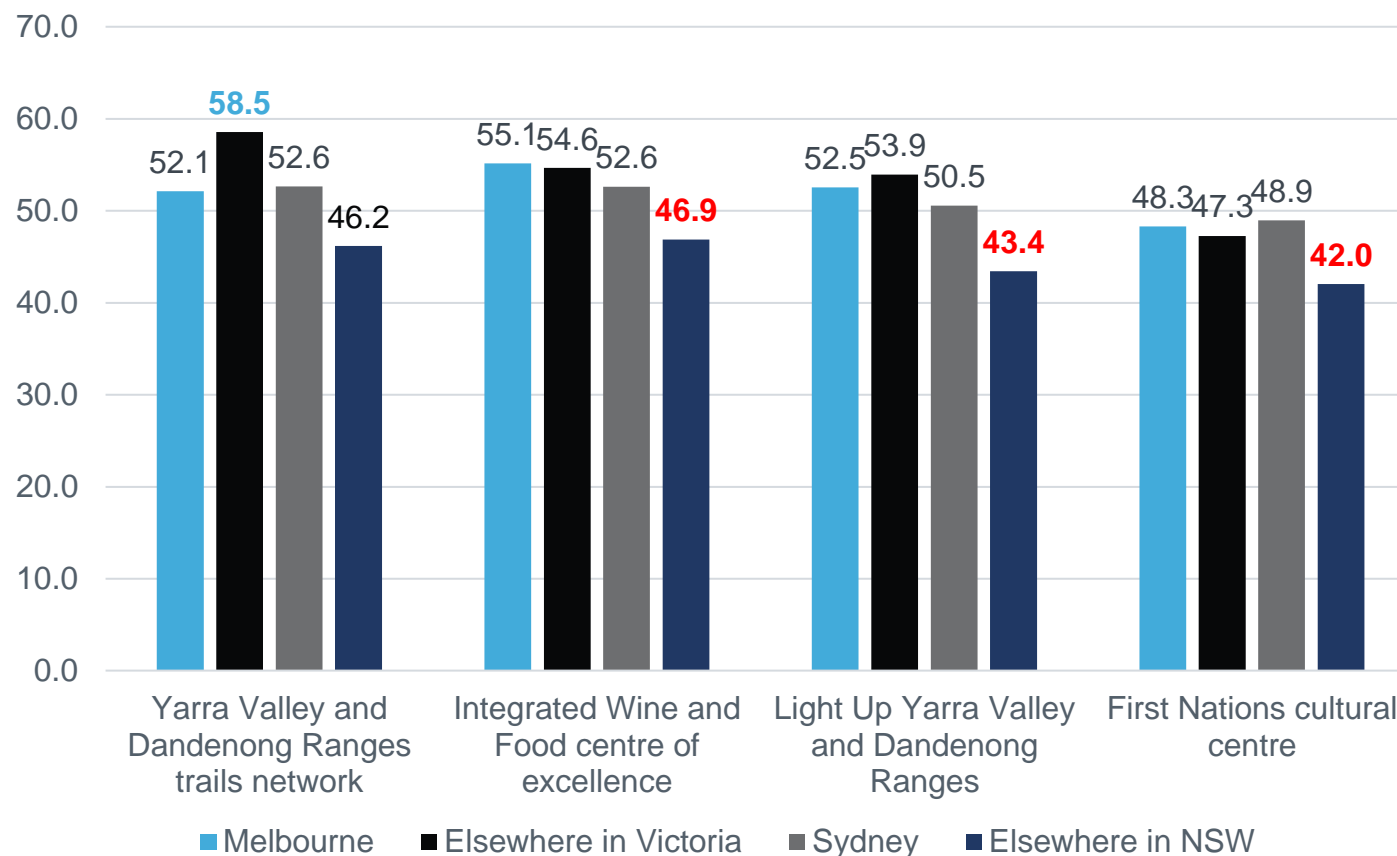


Q44 How likely are you to travel to the Yarra Valley and Dandenong Ranges region for this experience?

Base: all research participants $n=1,155$

Experiences – Likely to travel (index)

Residents of Regional Victoria are more likely to travel for the Yarra Valley and Dandenong Ranges trails network.



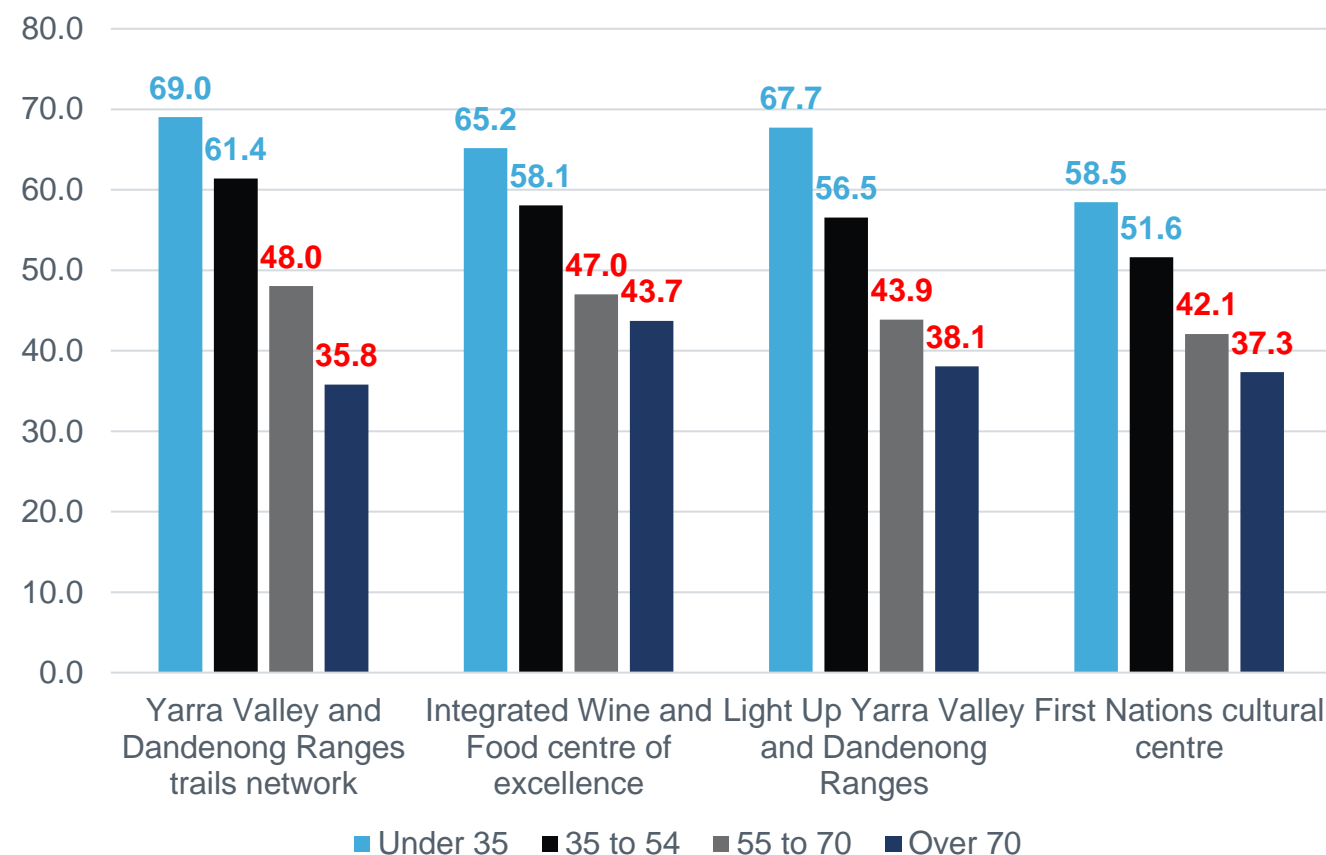
Q44 How likely are you to travel to the Yarra Valley and Dandenong Ranges region for this experience?

Base: all research participants n=1,155

Experiences – Likely to travel (index)

As found earlier in the report, those under 35 years and those aged 35 to 54 years are far more likely to travel for all experiences.

Those 55 years and over are much less likely to travel for any of the four experiences.

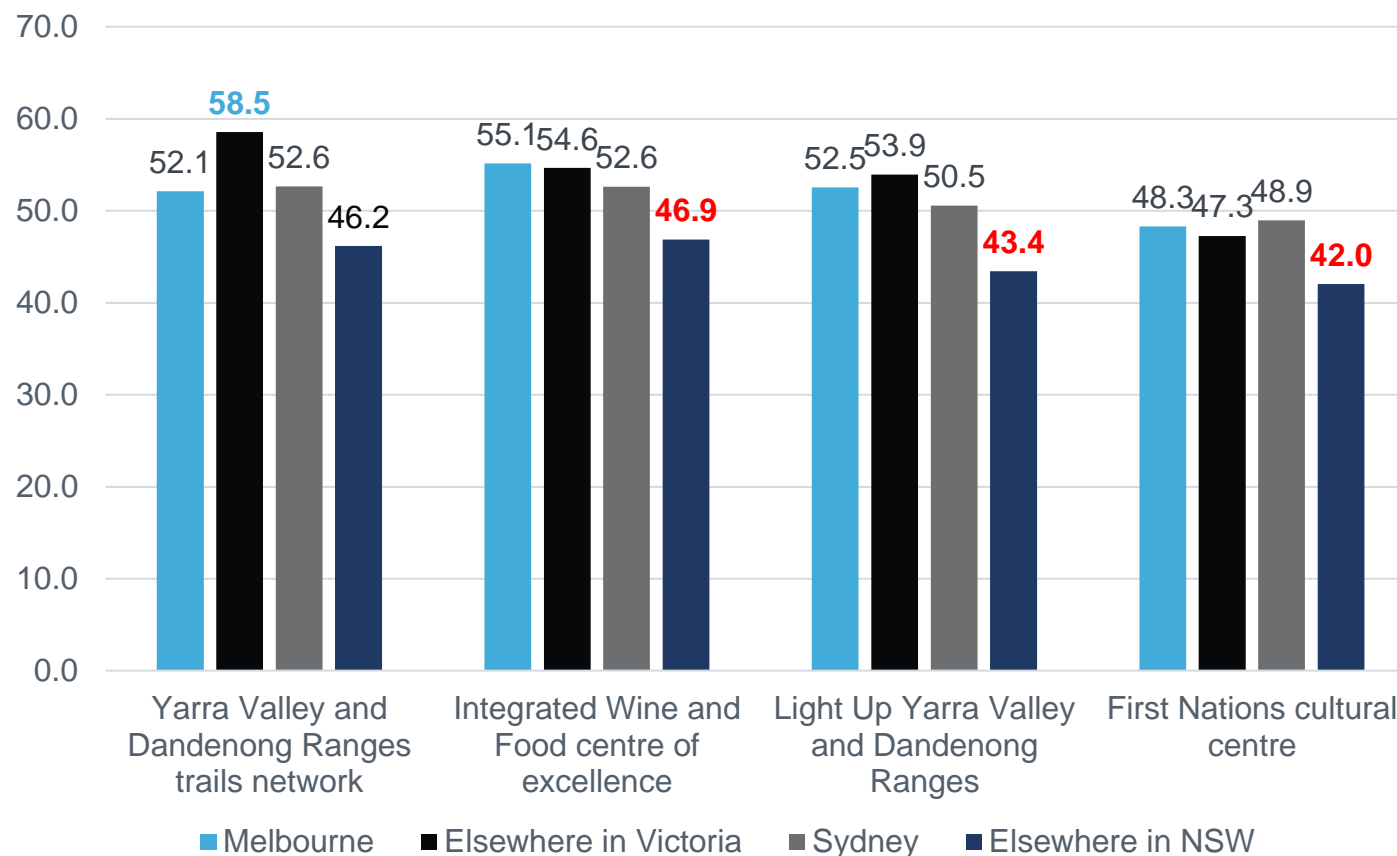


Q44 How likely are you to travel to the Yarra Valley and Dandenong Ranges region for this experience?

Base: all research participants $n=1,155$

Experiences – Likely to travel (index)

Regional Victorian residents are more likely to travel to the region for the Yarra Valley and Dandenong Ranges trails network.

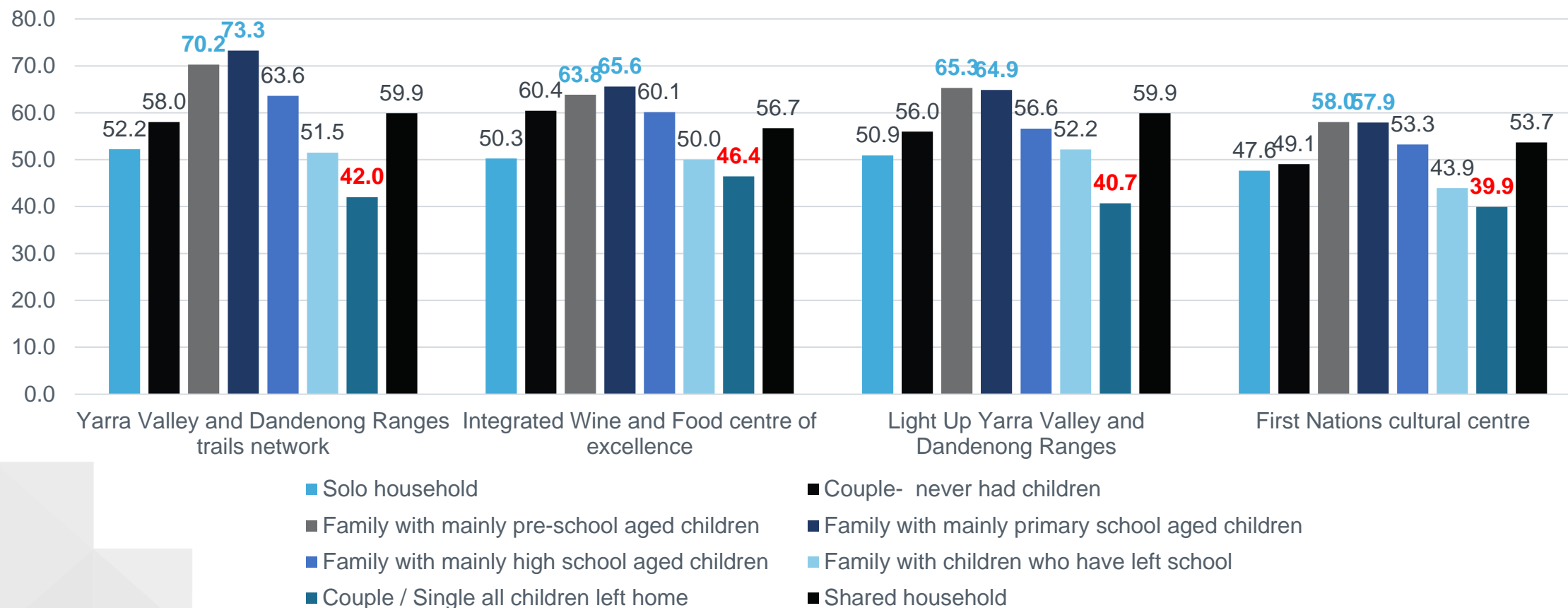


Q44 How likely are you to travel to the Yarra Valley and Dandenong Ranges region for this experience?

Base: all research participants $n=1,155$

Experiences – likely to travel (index)

Families are most likely to travel



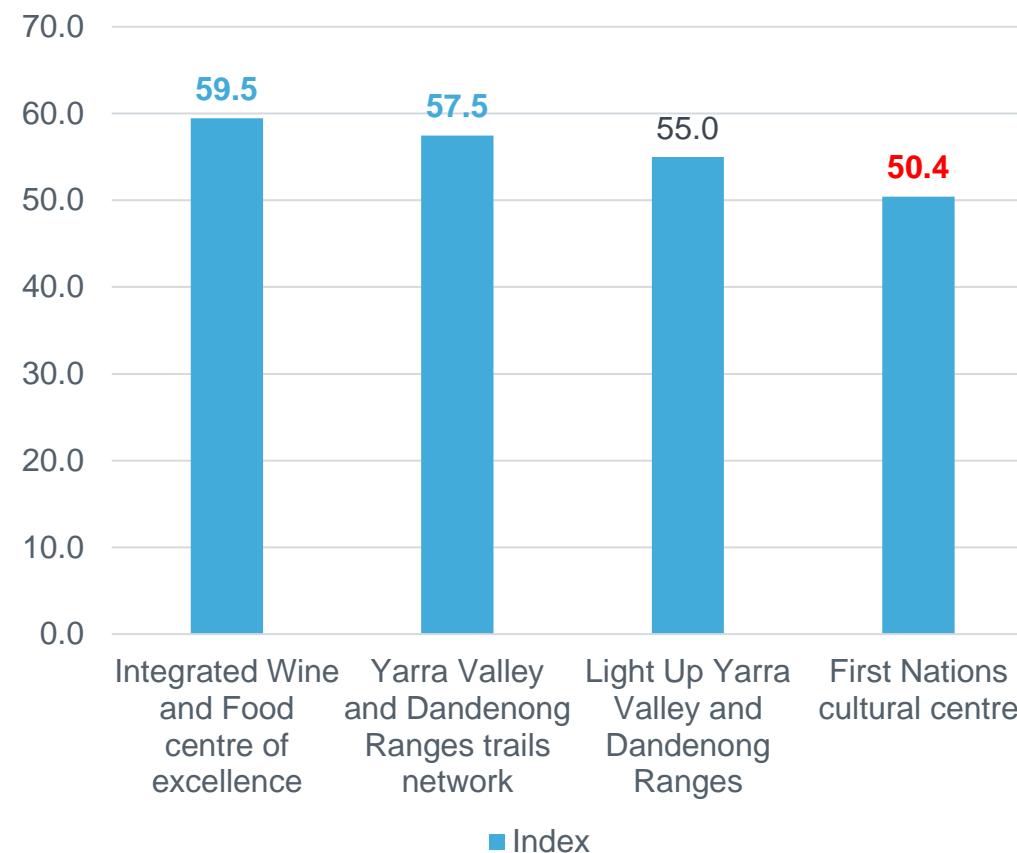
Q44 How likely are you to travel to the Yarra Valley and Dandenong Ranges region for this experience?

Base: all research participants n=1,155

Experiences appeal rating (index)

The rating for 'appeal' matches 'likely to travel' with the same experiences having more appeal though the 'top 2' switch their order.

- Integrated Wine and Food centre of excellence
- Yarra Valley and Dandenong Ranges trails network.

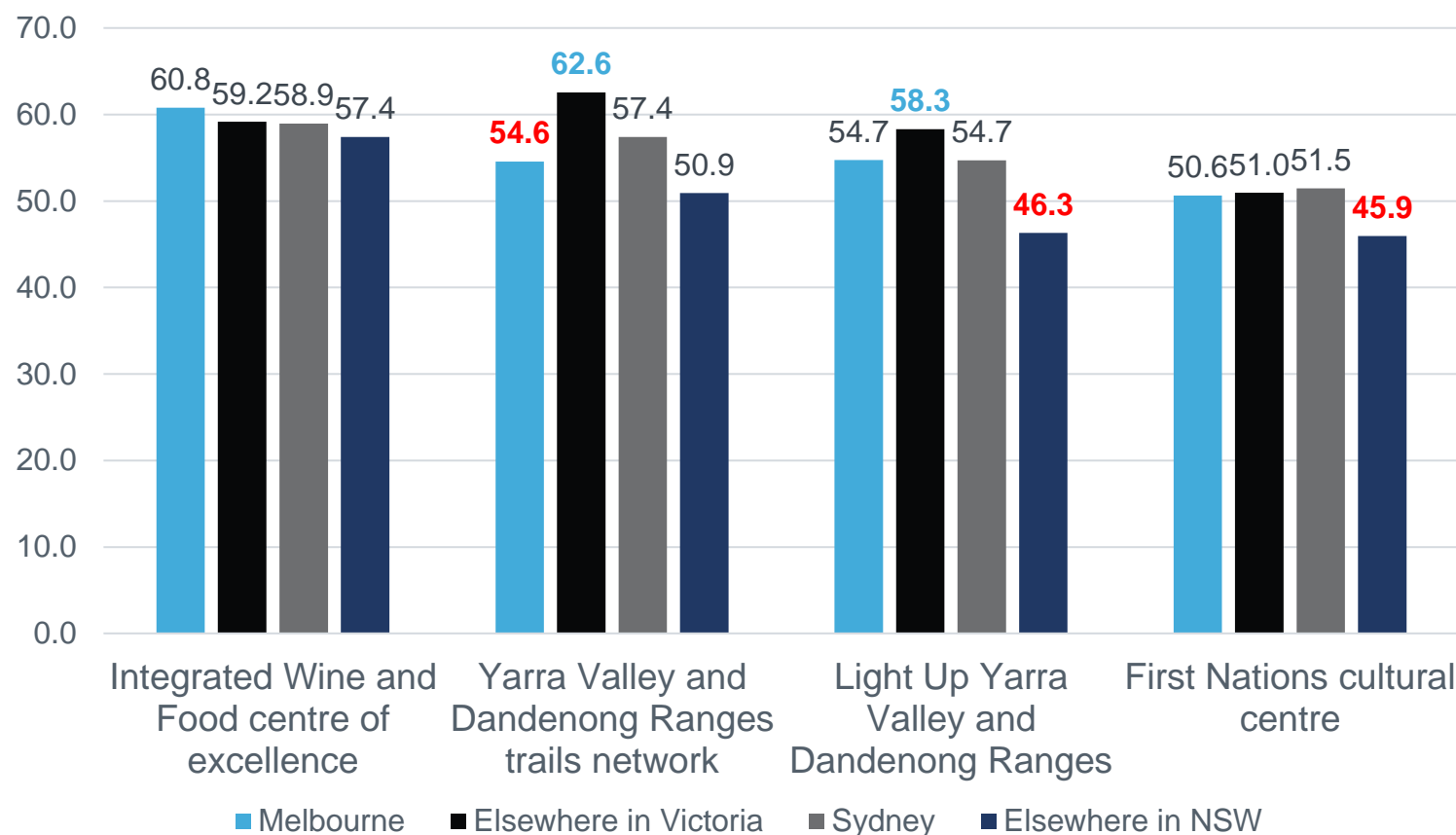


Q45 How appealing do you find this experience?

Base: all research participants $n=1,155$

Experiences appeal rating (index)

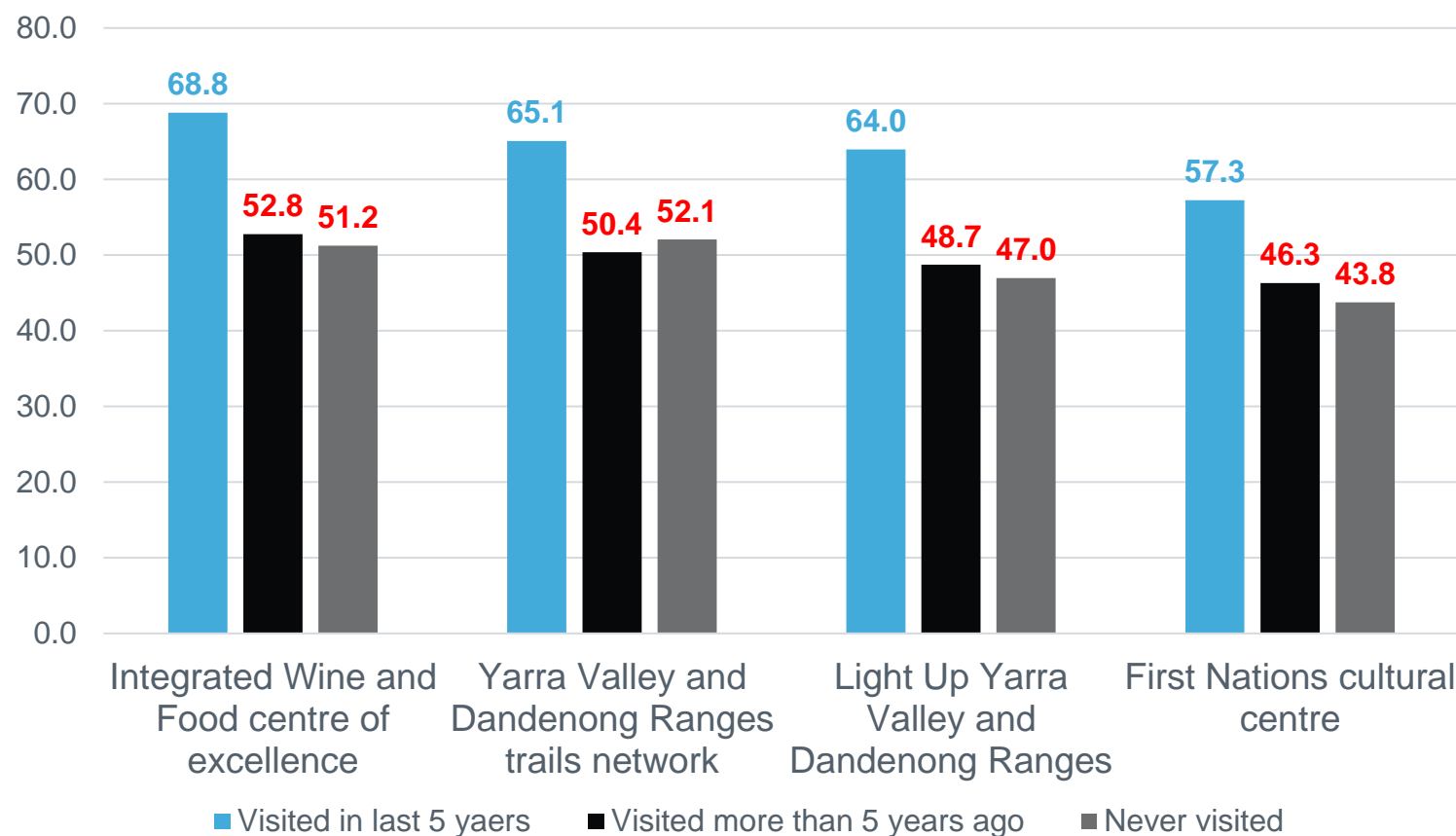
Residents of Regional Victoria find the 'trails network' and 'Light Up' experiences more appealing than others.



Q45 How appealing do you find this experience?
Base: all research participants n=1,155

Experiences appeal rating (index)

Those who have visited the region in the last 5 years are far more likely to find all the experiences more appealing than those who have visited some time ago, or who have never visited the region.

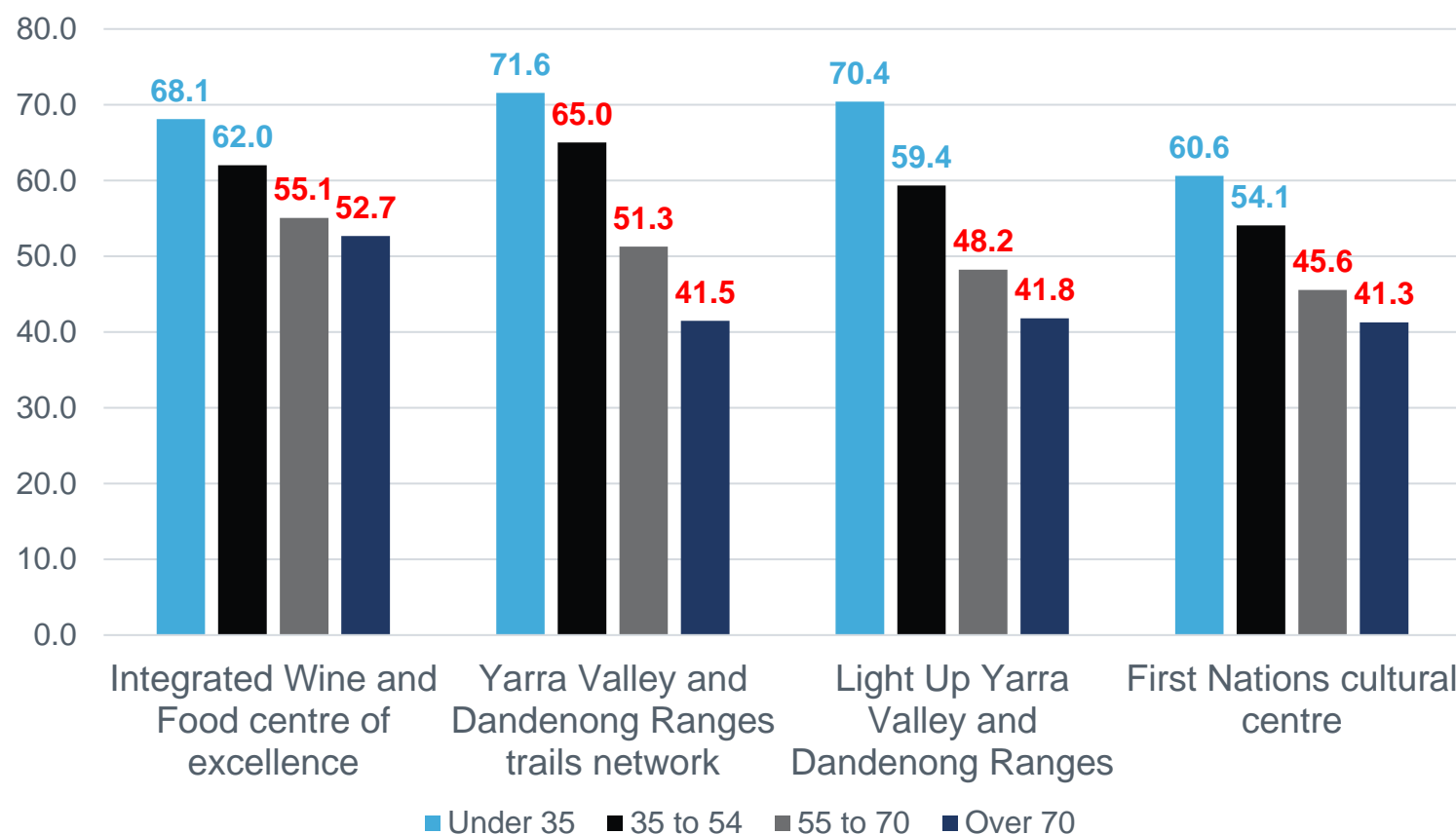


Q45 How appealing do you find this experience?
Base: all research participants n=1,155

Experiences appeal rating (index)

Those aged under 35 years find all of the four experiences much more appealing than others.

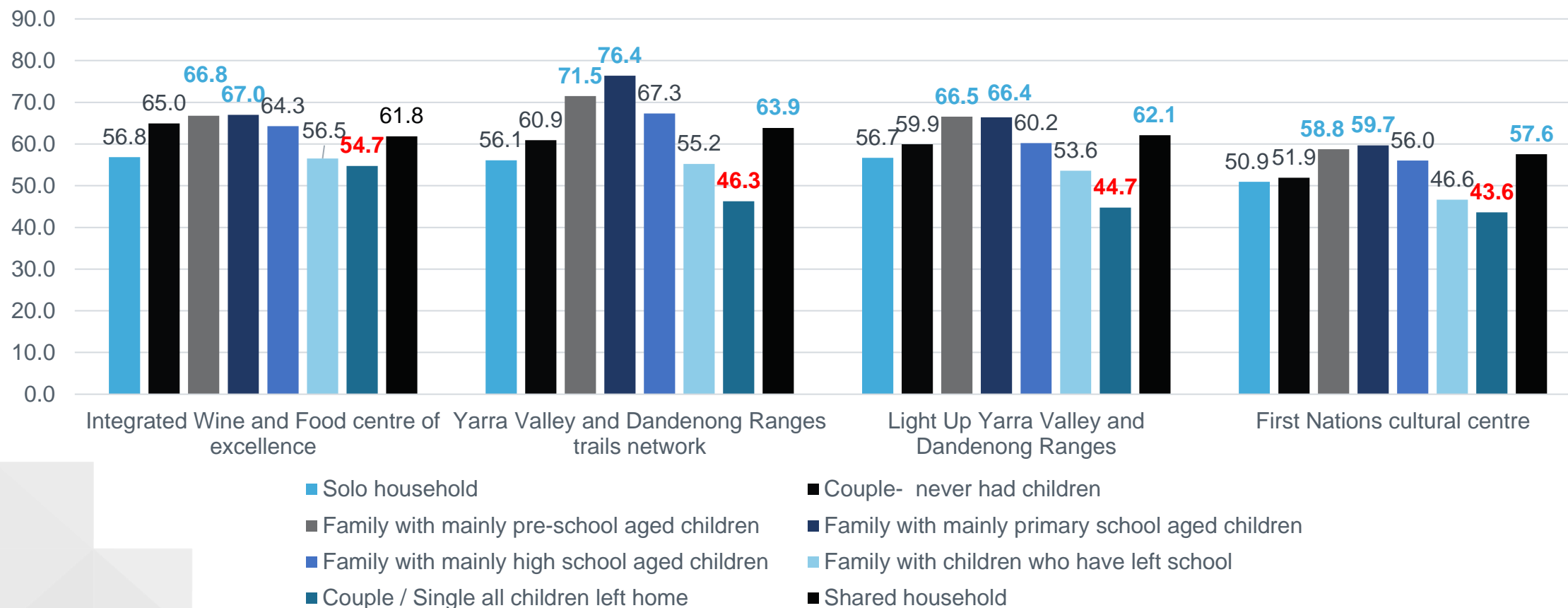
Those aged 35 to 54 years also find all of the experiences more appealing.



Q45 How appealing do you find this experience?

Base: all research participants n=1,155

Experiences most appealing to families and shared households

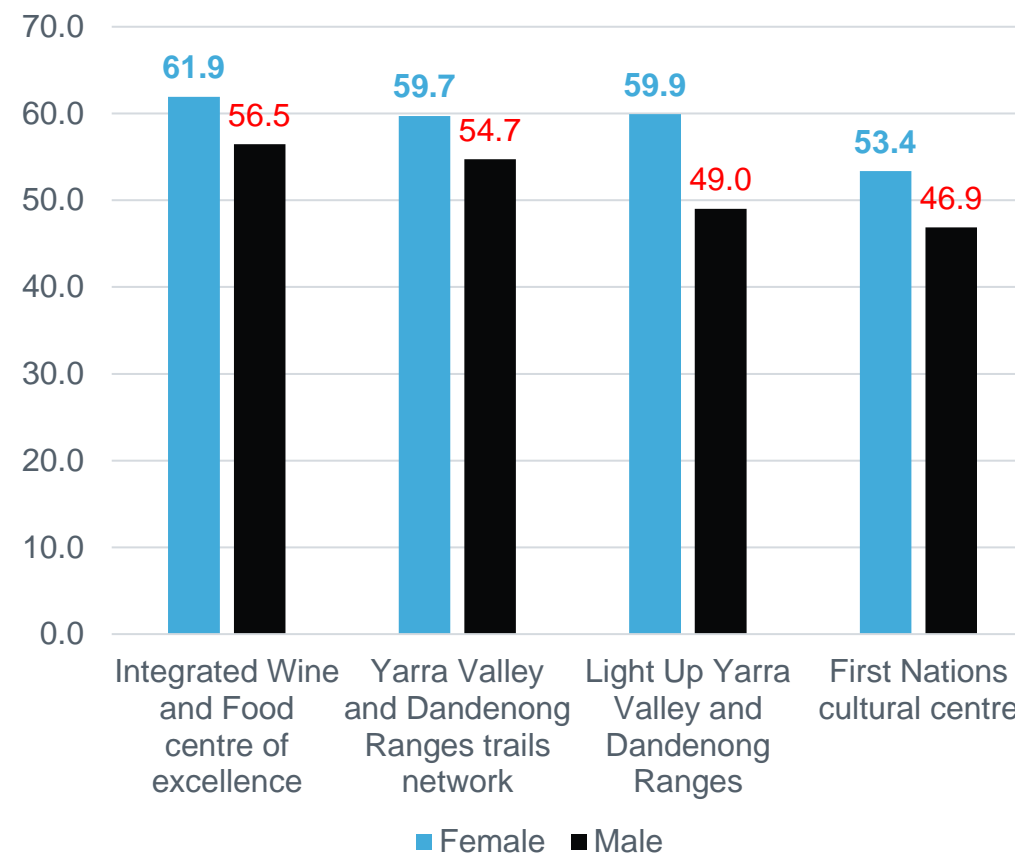


Q45 How appealing do you find this experience?

Base: all research participants n=1,155

Experiences appeal rating (index)

All experiences are more appealing to women than men.



Q45 How appealing do you find this experience?
Base: all research participants n=1,155



DIFFERENCES BY SAMPLE SOURCE

Differences by sample source

ONLINE REPRESENTATIVE PANEL – 1,155 RESPONDENTS

Fewer visits, more likely to stay overnight, less satisfied with visits

- **Less likely to visit region**
 - 45% visited in last five years
- **More likely to stay overnight**
 - 47% overnight stay
- **Visitors have slightly lower satisfaction**
 - Index of 78.7 for visit
- **Lower NPS for visit**
 - Score of 21.4
- **Lower awareness of all experiences**

YRT DATABASE – 226 RESPONDENTS

More engaged, local, and higher satisfaction when visiting

- **Much more likely to visit region**
 - 96% visited in last five years
 - 74% visited in 2022
- **Less likely to stay overnight**
 - 34% overnight stay
 - 71% of those who do not stay overnight live nearby
- **Visitors have higher satisfaction**
 - Index of 89.9 for visit
- **Far higher NPS for visit**
 - Score of 77.4
- **Higher awareness of all experiences**

Differences by sample source

ONLINE REPRESENTATIVE PANEL – 1,155 RESPONDENTS

Less keen travellers

- **Less likely to stay in:**
 - AirBnb 22%
 - B&B 20%
 - Serviced apartment 18%
 - Caravan park 18%
- More likely to visit region in Summer (21%) than all year round (29%)
- More likely to travel by themselves (20%)
- More likely to consider 'value for money' when choosing a destination (61%)
- Less likely to prioritise food and dining out when travelling (56%)

YRT DATABASE – 226 RESPONDENTS

They like to travel

- **More likely to stay in:**
 - AirBnb 53%
 - B&B 34%
 - Serviced apartment 28%
 - Caravan park 23%
- Less likely to visit region in Summer (9%) and visit all year round (47%)
- Less likely to travel by themselves (12%)
- Less likely to consider 'value for money' when choosing a destination (49%)
- More likely to prioritise food and dining out when travelling (74%)

Differences by sample source

ONLINE REPRESENTATIVE PANEL – 1,155 RESPONDENTS

Lower interest in new regional expediencies

- **Lower index scores for new region experiences**
 - Integrated Wine and Food centre of excellence 59.5
 - Yarra Valley and Dandenong Ranges trails network 57.5
 - Light Up Yarra Valley and Dandenong Ranges 55.0
 - First Nations cultural centre 50.4

YRT DATABASE – 226 RESPONDENTS

Higher interest in new regional experiences

- **Higher index scores for new region experiences**
 - Integrated Wine and Food centre of excellence 70.8
 - Yarra Valley and Dandenong Ranges trails network 64.7
 - Light Up Yarra Valley and Dandenong Ranges 66.0
 - First Nations cultural centre 59.7