



YARRA RANGES TOURISM

Community Survey of Local Residents

MARCH 2023

Community Research Undertaken by JMP Consultants for ODIN360



Approach and methodology

Approach and methodology

SAMPLE SIZE AND CONFIDENCE LEVEL

Excellent sample size

The final sample size is $n=491$. This gives a confidence level of $\pm 4.4\%$ at the 95% confidence level

- 931 commenced the survey
- 20 were screened out from the survey
- 420 discontinued answering the survey after commencement

Fieldwork period

Fieldwork commenced on 1 February 2023 and concluded on 11 March 2023.

SAMPLE

Sample source and representation of local residents

This survey was distributed by Yarra Ranges Tourism, along with Manningham, Yarra Ranges, Nillumbik and Cardinia Councils across a multitude of channels. These includes newsletters, websites, internal communications, bulletins, Instagram and numerous different Facebook pages.

Limitations of this research

The sample source used '**self-selection**'. This is where only those who choose to participate are interviewed. Typically this skews to those who are more positive and more negative with those who do not care choosing to not participate in the survey.

The **ability to participate** in the research is limited to the channels used to recruit research participants. Local residents not aware of these channels could not answer the survey.

Understating the data

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.

Rounding error

All numbers in the data are calculated to nine decimal points.

Charts and tables show numbers rounded to the nearest whole number. For example, 51.1 to 51.4 are shown as 51 while 5.5 to 51.9 are shown as 52.

In adding together data we have used the full nine-digit number to calculate the addition. In some cases, this will mean that the total number used in text or breakout boxes is not the same as simply adding the numbers in the charts and tables together.

We use this method as it is the most accurate way to report findings.

This will sometimes mean that adding with a calculator will give an apparent total of 99 or 101.

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.

The index is generated by giving each of the possible responses a number between 0 and 100 with equal increments for each response (i.e. for a 5 scale response, each of the unique responses would be allocated either 100, 75, 50, 25 and 0, while for a 4 scale response, each of the unique responses are allocated either 100, 66.6, 33.3 and 0 to generate an index out of 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 and base sizes

		%	n			%	n
Q17 Gender	NET	100	491	Q1 Age group	NET	100	491
	Male	32	159		Under 34	11	53
	Female	62	303		35-44	17	85
Q22 Work in tourism or hospitality	Gender diverse / refused	6	29	Q20 Highest education	45-54	26	126
	Yes, work in tourism/hospitality	13	62		55-64	24	120
	Do not work in tourism/hospitality	87	429		65 +	22	107
Q18 HH income	Under \$50,000	9	45	Q21 Employment	Did not complete high school	2	10
	\$51,000 to \$110,000	23	113		Completed high school	8	41
	\$111,000 to \$200,000	23	112		Completed a trade certificate or diploma	19	91
	Over \$200,000	9	42		Completed a bachelor's degree	24	116
	Refused	36	179		Completed a postgraduate degree, graduate certificate, or gr	31	151
Q19 HH structure	Solo household - never had children	4	18		Other / refused	17	82
	Couple - never had children	11	56		Employed part time	15	74
	Family with mainly pre-school aged children	6	29		Employed full time	28	136
	Family with mainly primary school aged children	9	42		Self-employed full time	14	69
	Family with mainly high school aged children	13	66		Self-employed part time	6	31
	Family with children who have left school	12	60		Casual employment	2	8
	Couple / Single all children left home	24	116		Home duties	3	15
	Shared household	3	15		Retired	18	86
	Other / I'd rather not say	18	89		Student	1	3
					Other / I'd rather not say	14	69



Executive summary

Living in the region

A POSITIVE EXPERIENCE

Residents love the region

The findings show that almost all residents love living in the region with a very high level of satisfaction.

POSITIVE ATTRIBUTES

The same as for visitors

Residents love the same things about the region found in the visitor research.

The natural environment, State and National Parks, wining and dining and other hospitality opportunities, open space, and adventure activities are just as popular with residents as they are with tourists.

ISSUES IN THE AREA

There are some concerns or residents

While residents love the area they have issues with a wide range of areas that mostly relate to infrastructure.

Top of the list is the quality of local roads. But other areas of concern include:

- Waste recycling and management
- Public toilets
- Public transport
- Job opportunities
- Improvement of town amenity
- Public car parking

While lower in the list of issues, 'too many tourists' is still somewhat of a problem.

Role of tourism in region

IMPORTANT FOR REGION

Strong support for existing tourism

The findings show that residents recognise the importance of tourism for creating jobs and employment, delivering important revenue to local economy, and making residents feel proud they live in a region that is attractive and valued by visitors.

TOURISM HAS DOWNSIDES

Tourism has negative impacts

While recognising the value of tourism there appears to be a constant theme that tourism can create issues such as congestion, over tourism, environmental impacts, land development and a lack of direct benefits to residents.

The reservations on tourism are found in the that over 50% of residents wish to see tourism remain at the current levels or decrease.

Only one-in-five wish to increase tourism and even then, they want to see 'managed growth'.

MANAGING GROWTH

Important to preserve social licence

The social licence to operate is frequently applied to commercial operations but it is just as valid in managing tourism and the impact on residents.

This is more than a simple communications plan, it needs a strategy that ensures that growth has either positive or at least minimal negative impacts on residents.



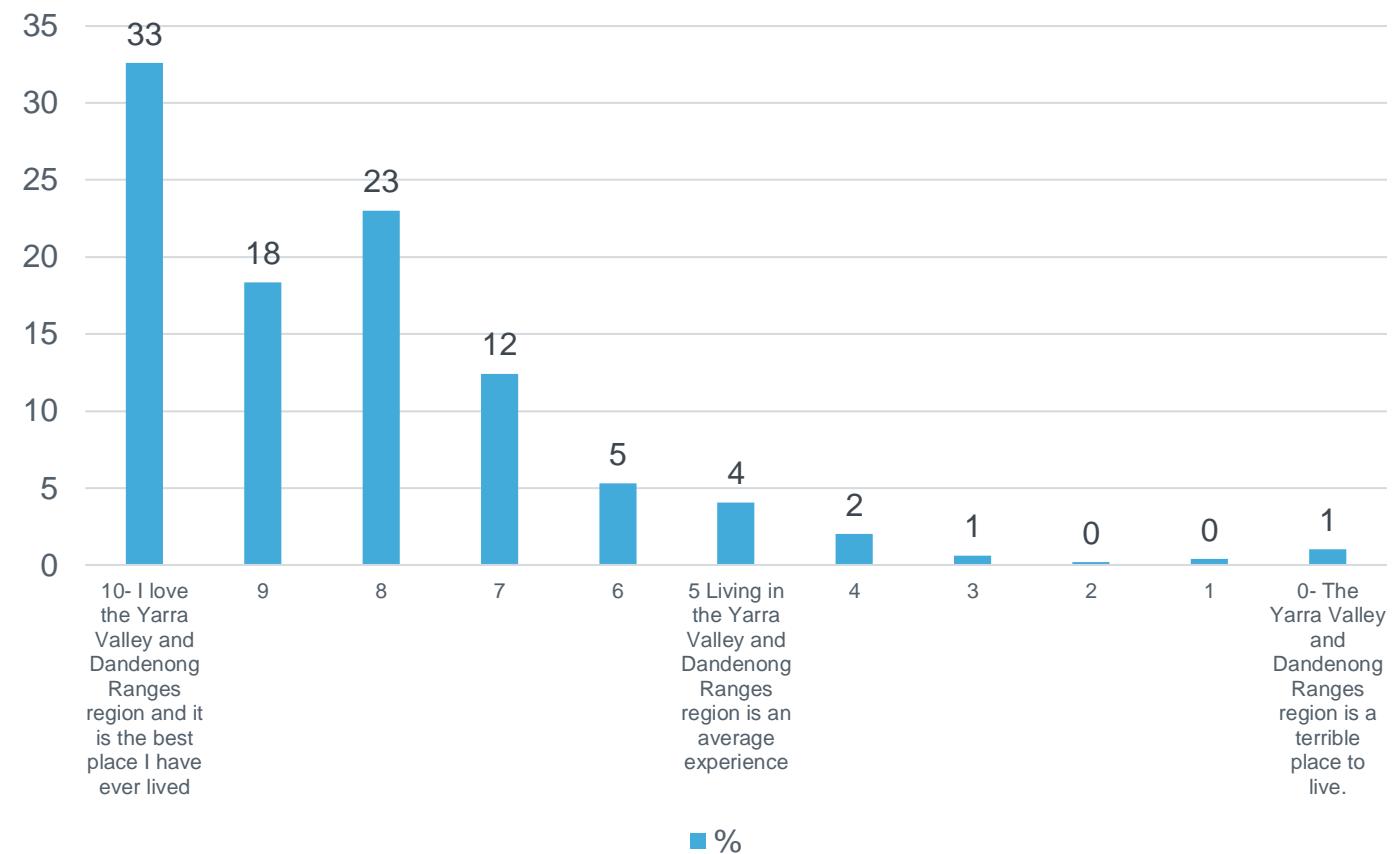
Living in the region - Satisfaction

Satisfaction with life in region

One-third (33%) rated satisfaction as a 10.

- Positive satisfaction (rating of 6 to 10) is 92%.
- Negative satisfaction (rating of 0 to 5) is only 8%.

Research participants appear highly satisfied with living in the region.



Q4 Thinking about your satisfaction with living in the Yarra Valley and Dandenong Ranges region with 0 being "It is a terrible place to live" and 10 being "It is the best place to live", please rate your enjoyment of your experience. Base: all research participants $n=491$

Positive aspects of life in the region

Those who rated their satisfaction as 6 to 10 for life in the region (92%) were asked to choose why they felt that way.

Key reasons are:

- Natural beauty
- Close to State and National Parks
- Open space with few people
- Friendly locals
- Adventure activities
- Cafés and restaurants
- Wineries and cellar doors

In this list, the natural environment is the most outstanding feature. Following this are the local amenities.

	%		%
The natural beauty is incredible	83	There is so much to do and see	22
So close to nature and State and National Parks	67	It has everything I need	23
Lots of open space, lack of crowds and feels like an escape	62	Weather	15
Friendliness of locals	49	Excellent and unique places to shop	15
I can undertake adventure activities I like (bushwalking, hiking, mountain biking, running, cycling, fishing etc.)	45	Great quality of services and amenities	9
Great cafes and restaurants	39	Community	8
Great wineries and cellar doors	36	Traffic	2
Easy to get around, little traffic	30	Riding	0
I can undertake a range of cultural activities (i.e. markets, museums, galleries etc.)	30	Other	0

Q6 Positive elements of living in area CODED Base: those rating 6 to 10 n=450

Negative aspects of life in the region

Those who rated their satisfaction as 0 to 5 for life in the region (8%) were asked to choose why they felt that way.

Of the few who rated their life in the region negatively issues are:

- Condition of the roads
- Lack of key services and amenities
- Too busy

Critically very few (10% $n=4$) mentioned 'too many tourists'.

	%		%
Condition of roads	73	Nothing much to do	22
Lack of key services and amenities	59	Cost of living	20
Too busy	49	It is too expensive	20
Lack of affordable transport options	41	Too many tourists	10
Public transport	39	It is not a great place to live for people like me	12
Limited activities to do at night	37	Weather	10
It is unsafe (i.e. bushfires, storms, more isolated)	37	Not family friendly	5
Unfriendliness of locals generally	24	Other (please tell us)	0
Too remote	24	Other	15

Q5 Negative aspects of living in area CODED Base: those who rated satisfaction as 0 to 5 $n=41$



Tourism growth and development

Agreement with tourism statements

Tourism is valued by research participants. Their contribution to the local economy is valued, it encourages more to explore the region, and residents are proud that tourists like to visit the region.

Fewer feel that tourism is important to their liveability, that it makes the region better for local residents amenity, or that it leads to overdevelopment.

However, when viewed as a rating scale the data can be somewhat confusing.

Therefore, the next page carries out the analysis as an index.

	Strongly agree	Agree	Neither agree or disagree	Disagree	Strongly disagree
Tourism boosts the local economy and is great for local businesses in the Yarra Valley and Dandenong Ranges region	32	45	13	5	5
Tourism creates jobs and local employment in the Yarra Valley and Dandenong Ranges region	32	46	13	6	3
Tourism helps put the Yarra Valley and Dandenong Ranges region on the map and encourages more people to visit and explore our wonderful region	30	48	15	4	3
I am proud that visitors wish to visit and explore what the Yarra Valley and Dandenong Ranges region has to offer. I love hosting friends and family here.	28	43	19	5	4
Tourism creates overcrowding, congestion and detracts from the local's way of life	28	28	20	20	4
Tourism has a negative impact on the environment (i.e. over-tourism, litter etc.)	25	34	19	16	5
Tourism leads to over-development and increased land-use	22	26	29	17	6
Tourism increases the vibrancy of the Yarra Valley and Dandenong Ranges region	19	39	19	15	7
Tourism helps to make the Yarra Valley and Dandenong Ranges region a better place to live, work and play for local residents	16	33	21	19	10
Tourism is important to my liveability	10	20	27	24	19

Q7 Tourism statement agreement Base: all research participants n=491

Agreement with tourism statements – index

Converting the ratings to an index provides a far clearer view of local residents' views on tourism.

Tourism has many positive aspects for local employment and the economy. However, it also creates negative outcomes with the environment, overcrowding and congestion, overdevelopment and land use, and it is not seen as important to liveability in the region.

The dichotomous outcome from this analysis reflects that tourists play an important role in the region, however, the number of visitors can also create negative outcomes for residents.

It suggests that the infrastructure needs to be in place to make tourism a positive experience for both visitors and residents.

	Index
Tourism creates jobs and local employment in the Yarra Valley and Dandenong Ranges region	74.2
Tourism helps put the Yarra Valley and Dandenong Ranges region on the map and encourages more people to visit and explore our wonderful region	74.1
Tourism boosts the local economy and is great for local businesses in the Yarra Valley and Dandenong Ranges region	73.5
I am proud that visitors wish to visit and explore what the Yarra Valley and Dandenong Ranges region has to offer. I love hosting friends and family here.	71.3
Tourism has a negative impact on the environment (i.e. over-tourism, litter etc.)	64.7
Tourism creates overcrowding, congestion and detracts from the local's way of life	63.7
Tourism increases the vibrancy of the Yarra Valley and Dandenong Ranges region	62.2
Tourism leads to over-development and increased land-use	60.2
Tourism helps to make the Yarra Valley and Dandenong Ranges region a better place to live, work and play for local residents	56.4
Tourism is important to my liveability	44.6

Q7 Tourism statement agreement Base: all research participants *n*=491

Agreement with tourism statements – index by working in tourism

Analysis shows that there are few demographic differences in agreement with statements with only consistent differences by those who work in hospitality and tourism.

13% of research participants work in the hospitality or the tourism industries.

Not surprisingly those who work in the industry are far more positive about tourism than other residents.

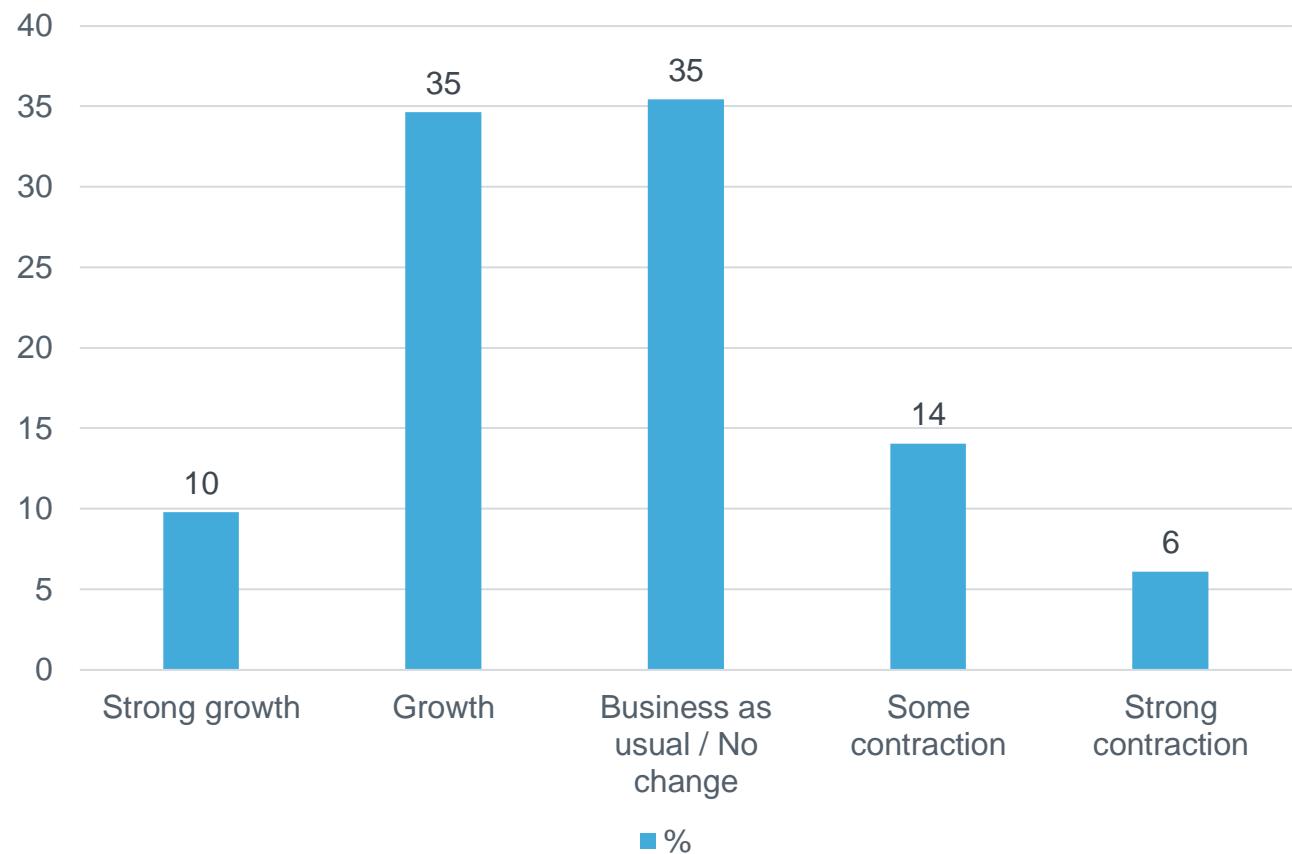
	Work in tourism	Do not work in tourism
Tourism creates jobs and local employment in the Yarra Valley and Dandenong Ranges region	82.7	73.0
Tourism helps put the Yarra Valley and Dandenong Ranges region on the map and encourages more people to visit and explore our wonderful region	83.9	72.7
Tourism boosts the local economy and is great for local businesses in the Yarra Valley and Dandenong Ranges region	81.9	72.3
I am proud that visitors wish to visit and explore what the Yarra Valley and Dandenong Ranges region has to offer. I love hosting friends and family here.	83.5	69.6
Tourism has a negative impact on the environment (i.e. over-tourism, litter etc.)	52.4	66.5
Tourism creates overcrowding, congestion and detracts from the local's way of life	50.8	65.6
Tourism increases the vibrancy of the Yarra Valley and Dandenong Ranges region	73.4	60.6
Tourism leads to over-development and increased land-use	48.8	61.9
Tourism helps to make the Yarra Valley and Dandenong Ranges region a better place to live, work and play for local residents	68.1	54.7
Tourism is important to my liveability	67.7	41.3

Preference for tourism growth

A combined total of 44% would like to see either 'strong growth' (10%) or 'growth' (35%) in future tourism.

This means that the majority would prefer the statis quo (35%) or even a decrease in tourism (a combined total of 20%).

This finding shows that the majority do not support growth, and those who support growth, are mostly only supportive of 'growth'.



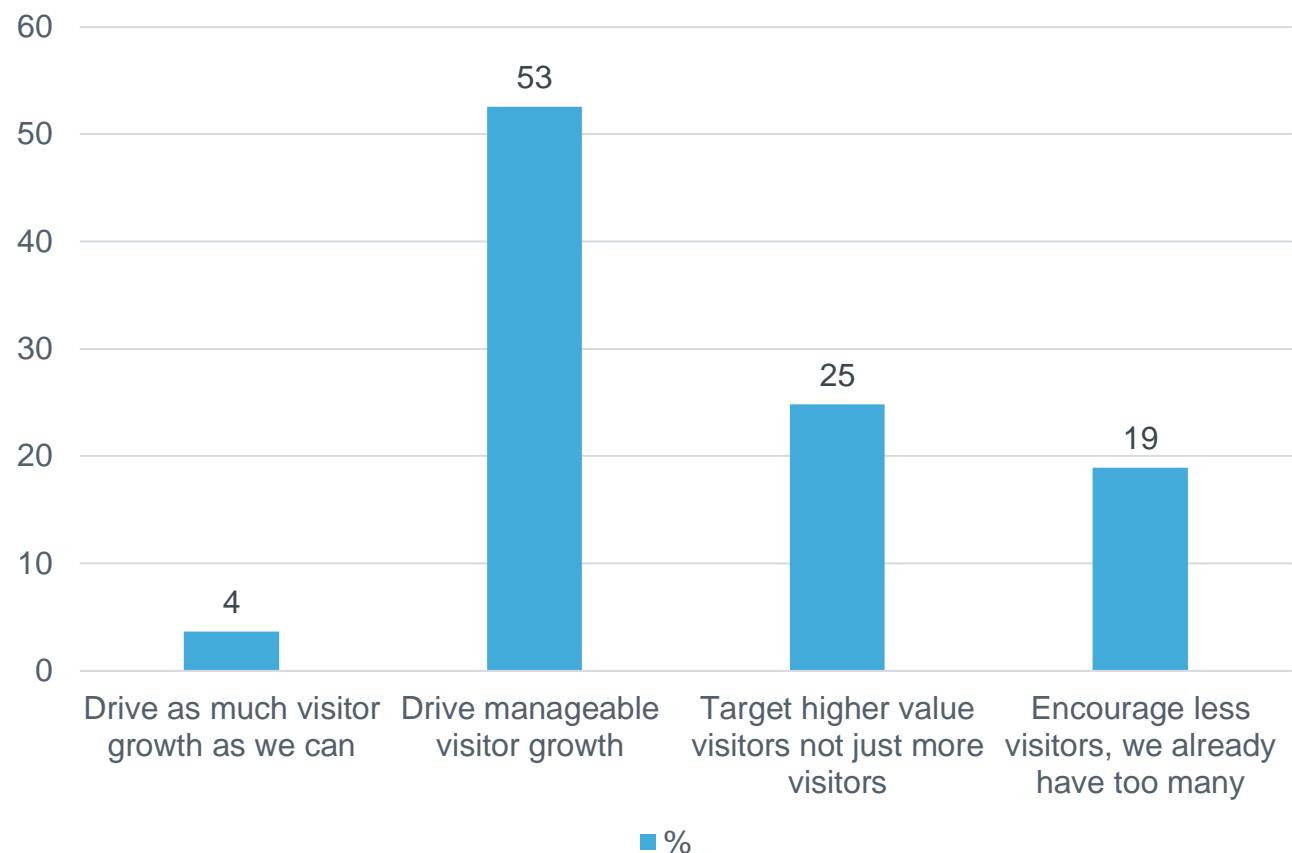
Q8 What would be your preference for the future of tourism in the Yarra Valley and Dandenong Ranges region – Growth, Business as Usual or Contraction? Base: all research participants n=491

Focus of tourism initiatives

This question gets to the heart of the issue of tourism in the region.

Over half (53%) support manageable tourism growth. There is the suggestion in this finding of concern with the region being potentially 'loved to death' by visitors.

This further supports the needs for appropriate tourism infrastructure in the region. Residents are not hostile to tourism, however they do not want negative outcomes from tourism impacting on their lives.

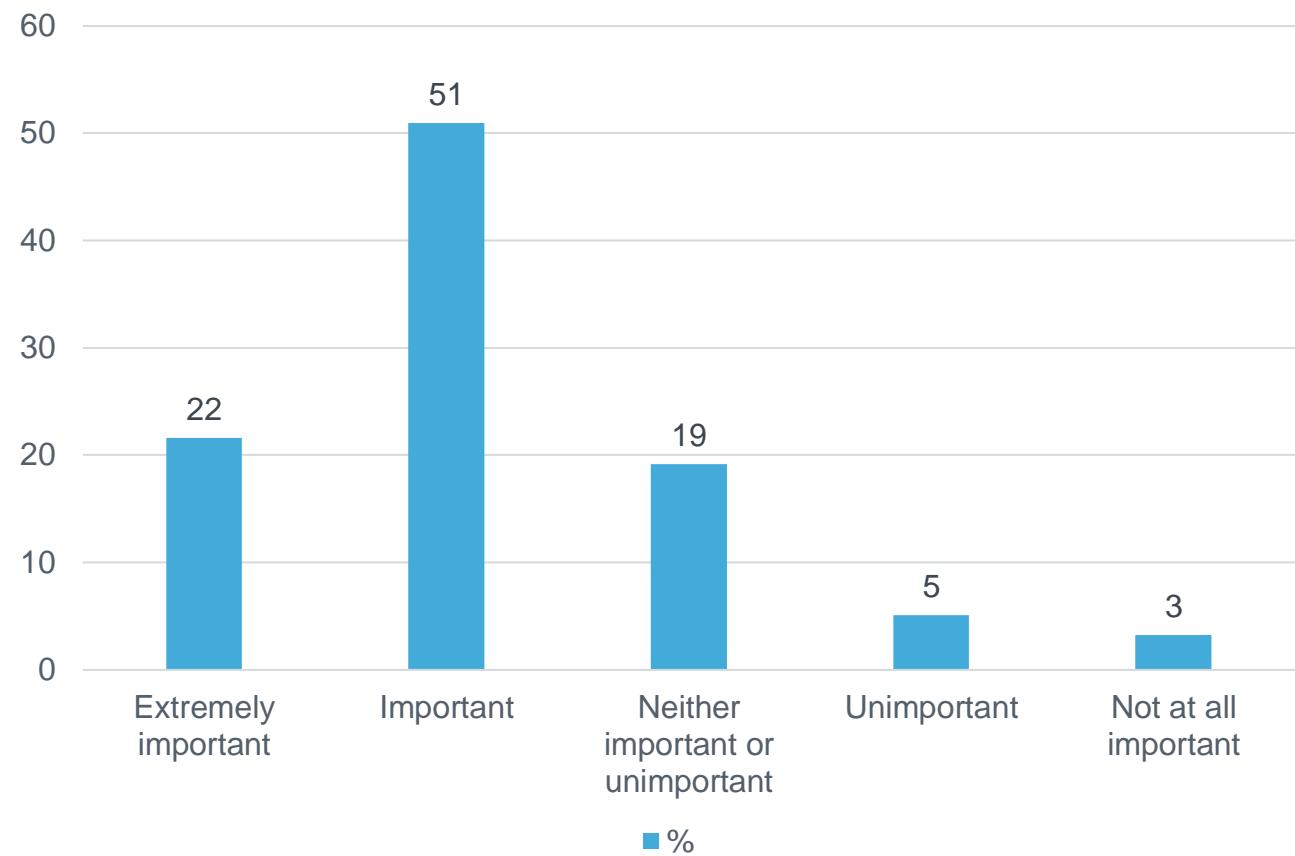


Q9 What do you believe should be the focus of tourism initiatives in the Yarra Valley and Dandenong Ranges region – Increased visitor numbers, targeting higher value visitors or less visitors no matter who they are? Base: all research participants $n=491$

Importance of tourism to the region

A combined total of 73% believe that tourism is important to the region with 22% 'extremely important' and 51% 'important'.

There is little doubt amongst local residents of the importance of tourism to the region.



Q10 To what extent do you believe tourism is important for the Yarra Valley and Dandenong Ranges region? Base: all research participants $n=491$

Top 3 experiences

The top experiences identified by local residents are:

- Healesville Sanctuary
- Walking and hiking trails
- State and National Parks
- Wineries and cellar doors
- Puffing Billy Railway

	%	%
Healesville Sanctuary	52	Sky High Mount Dandenong
Walking and hiking trails	41	Lake Mountain Alpine Resort
State and National Parks	37	Montsalvat
Wineries and cellar doors	34	Arts Centre Waburton
Puffing Billy Railway	25	Gumbaya World
Yarra Valley Chocolaterie & Ice Creamery	14	Diamond Valley Miniature Railway
Tarrawarra Museum of Art	12	Other
Four Pillars Distillery	10	I would not recommend any tourism experiences
Mountain bike trails	10	

Q11 Please indicate which are the Top 3 Yarra Valley and Dandenong Ranges tourism experiences you tell your friends or family about. Base: all research participants n=491

Other potential tourism experiences

Asked what other possible attractions would potentially encourage friends or family to visit the region, local residents believe that the focus should be on cultural along with food and wine events.

Despite the love of the natural environment, research participants mainly focused on indoor activities rather than outdoor activities.

	%
Food and wine showcases from local producers (Meet the winemaker / brewer / distiller evenings / dinners)	44
Garden exhibits	37
Art installations, exhibition and experiences	34
Indigenous experiences or education centres	31
Wellness resorts or experiences (spas, meditation retreats, forest therapy, nature experiences)	30
Evening / night activities / experiences (sounds and light shows or similar)	28
More family attractions	25
Night time events	23
Network of off-road trails for active recreation	20
World-class mountain bike trails	19
Other	16
Don't know / none of these	11

Q12 What other experiences / attractions would potentially encourage your friends or family to visit the Yarra Valley and Dandenong Ranges region? Base: all research participants $n=491$

Priority for improvement of local issues

This question was asked as a rating of:

- High priority
- Low priority
- Not a priority

This has been converted to an index for easier analysis.

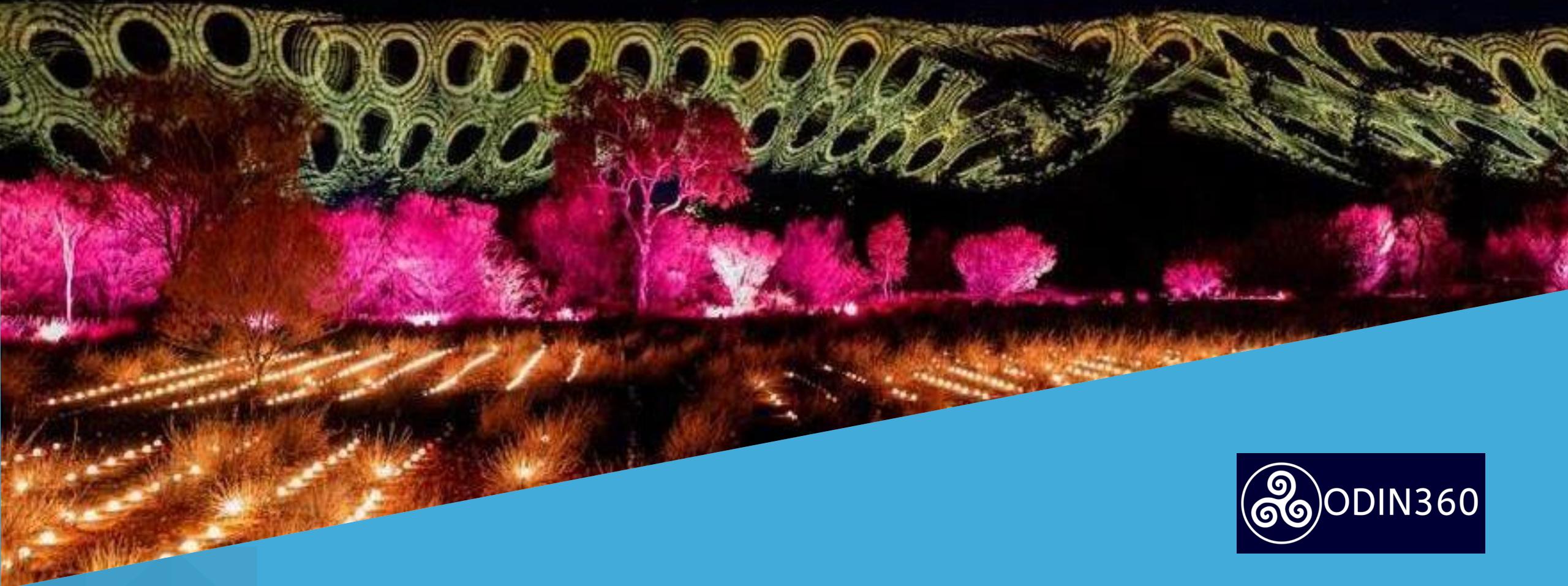
The highest priority by far is improving the condition of local roads.

This is followed by a range of other issues which are about local amenity for residents.

With an index of 61.1 is the issue of 'too many tourists'. This again shows that over tourism, or managing tourism with appropriate infrastructure, is a secondary issue but it still a concern for residents.

	Index		Index
Road condition	95.0	Skills training	68.3
Waste recycling	87.7	Variety of activities on offer in the region	62.1
Waste management services	85.4	Taxis / Uber and other rideshare companies	62.2
Public toilets	83.3	Too many visitors	61.1
Public transport	80.4	Quality of visitor accommodation	56.2
Job opportunities	79.0	Amount of visitor accommodation	50.9
Beautification of our region's towns	78.5	Night time activities	48.3
Public car parking	74.2	Visitor accommodation cost	45.7
Statutory Planning complexity, delays or issues requirements	71.4	Promotion to increase visitor numbers	43.2
Visitor information and signage	68.8		

Q15 Please indicate whether you think the following local issues are a 'high priority', 'low priority' or 'not a priority'. INDEX Base: 491

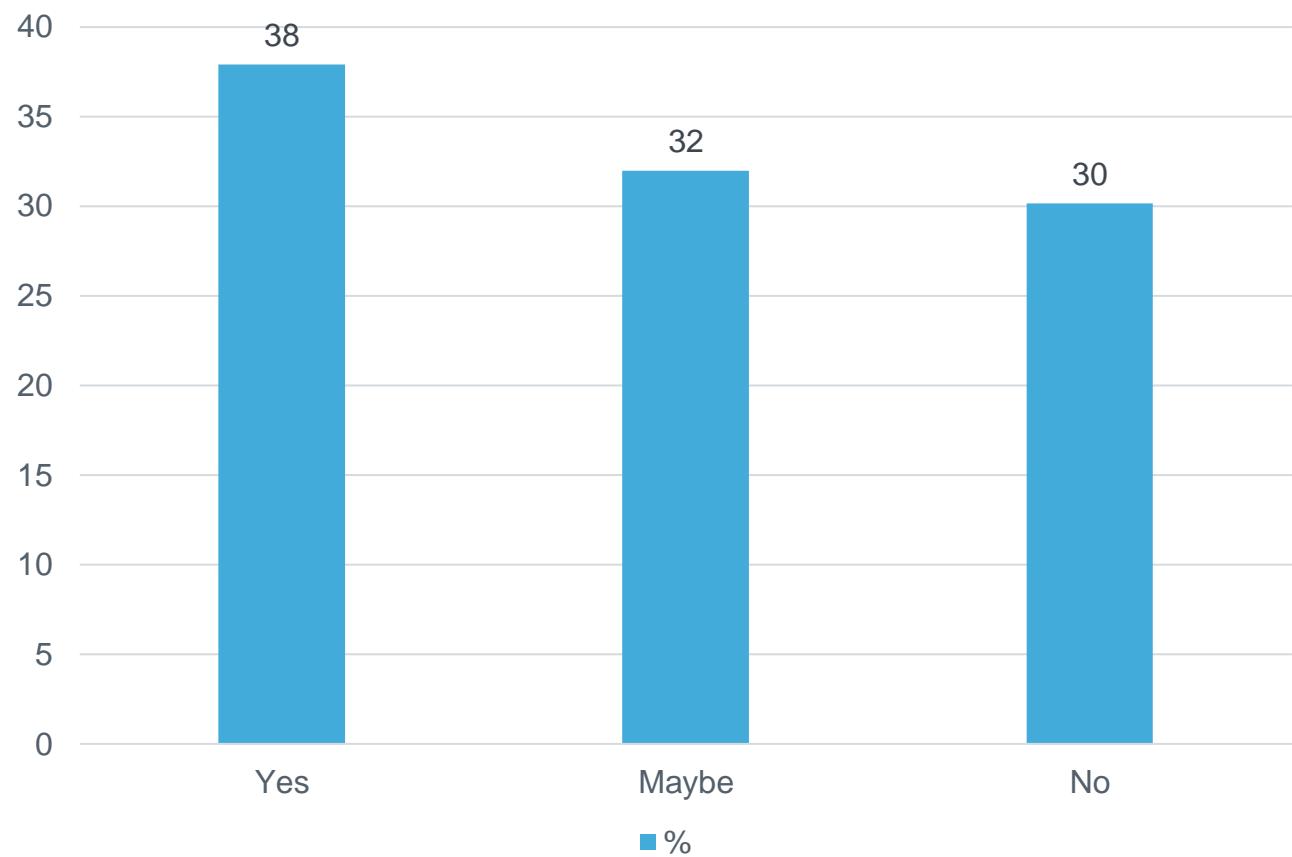


Light up

Interest in Light Up

38% answer 'yes' to their interest in Light-up – an art and nature night-time experience event.

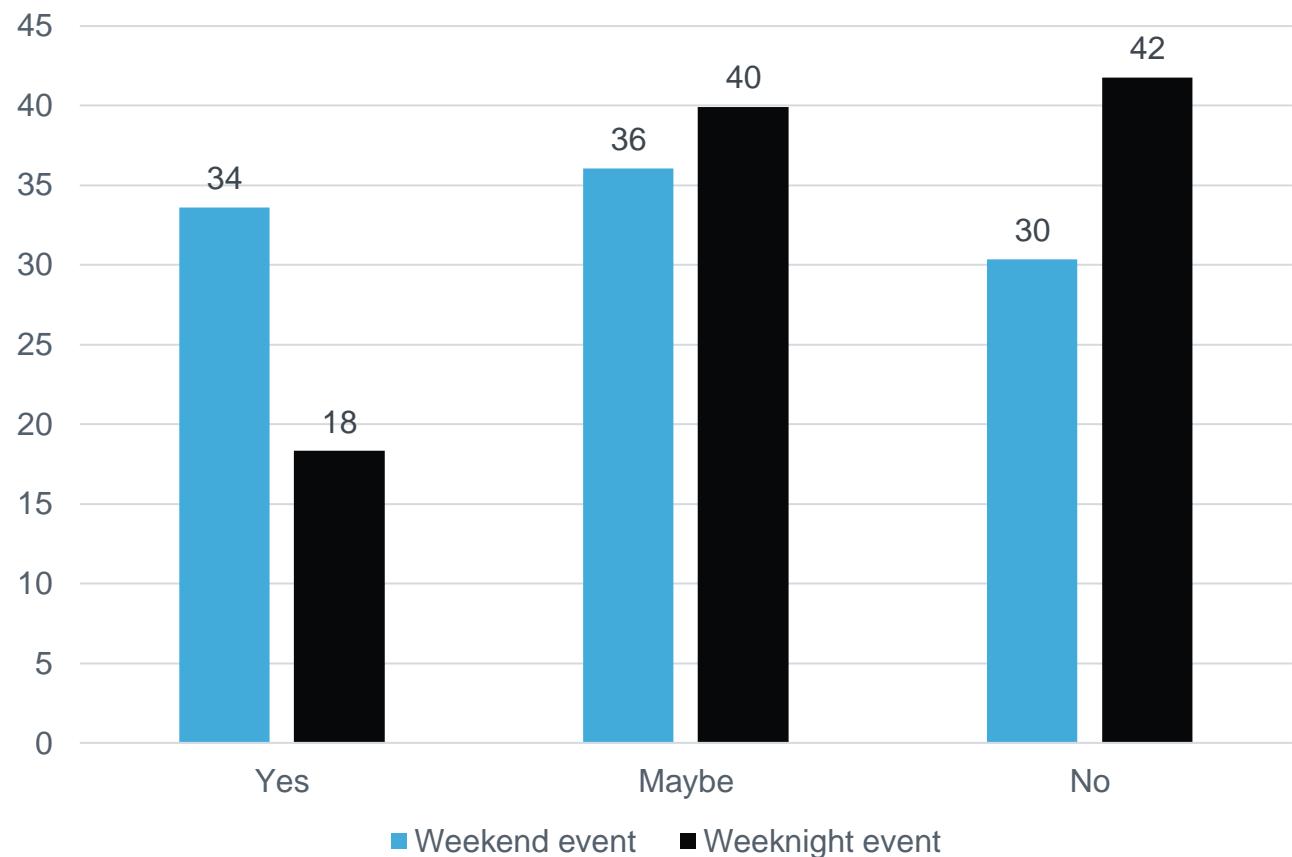
However, it should be noted that not a great deal of detail was provided on the event concept, and as such, the concept would ideally be further tested further once the event concept and imagery is developed.



Q28 Would you be interested in light-up – an art and nature night-time experience event in the region? Base: all research participants $n=491$

Likely attendance at Light Up

Likely attendance is significantly higher on weekends (34%) when compared to weekdays (18%).



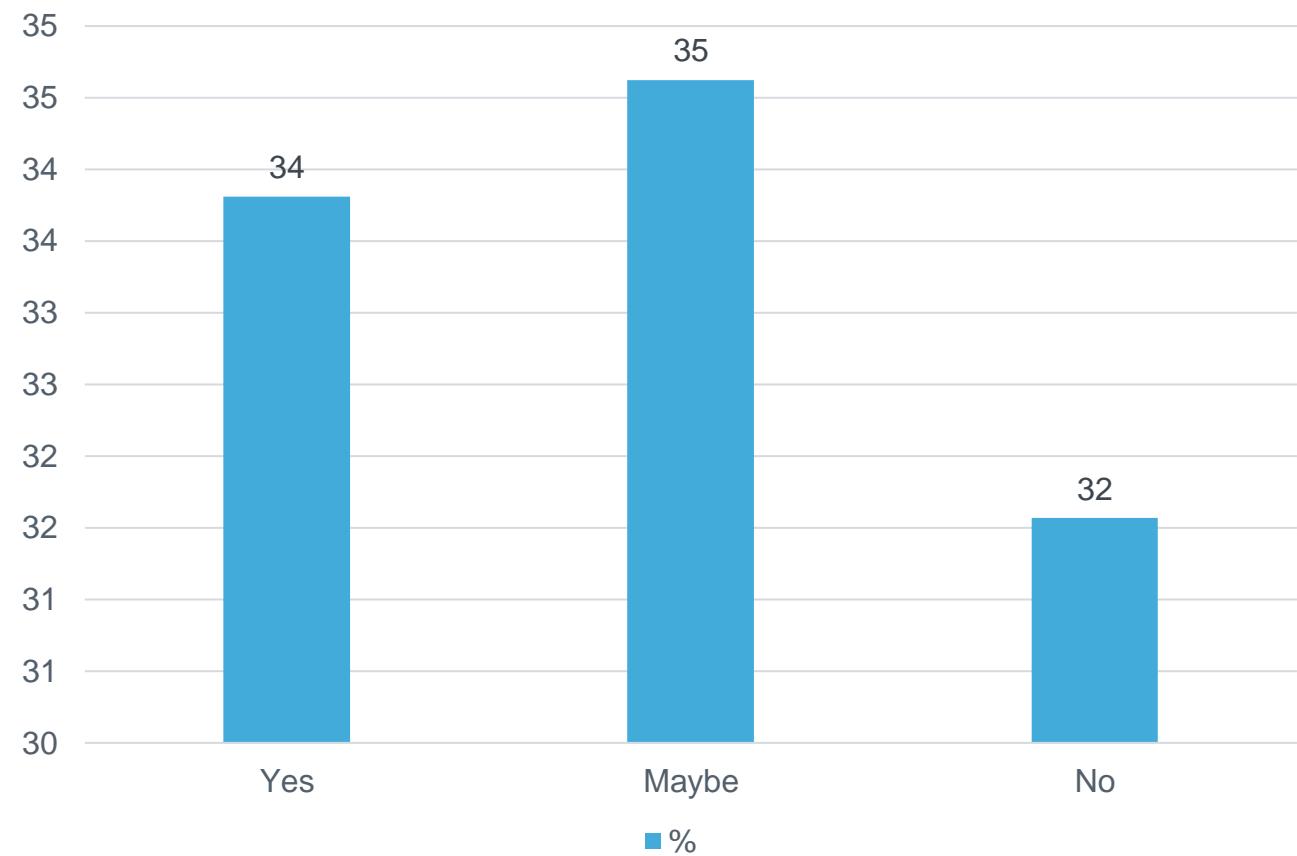
Q29 If this was a unique weekend night-time event, would you attend?

Q30 If this was a unique midweek-only night-time event, would you attend?

Base: all research participants $n=491$

Encourage friends to attend Light Up

34% of research participants would encourage friends and family from outside the region to attend Light Up.



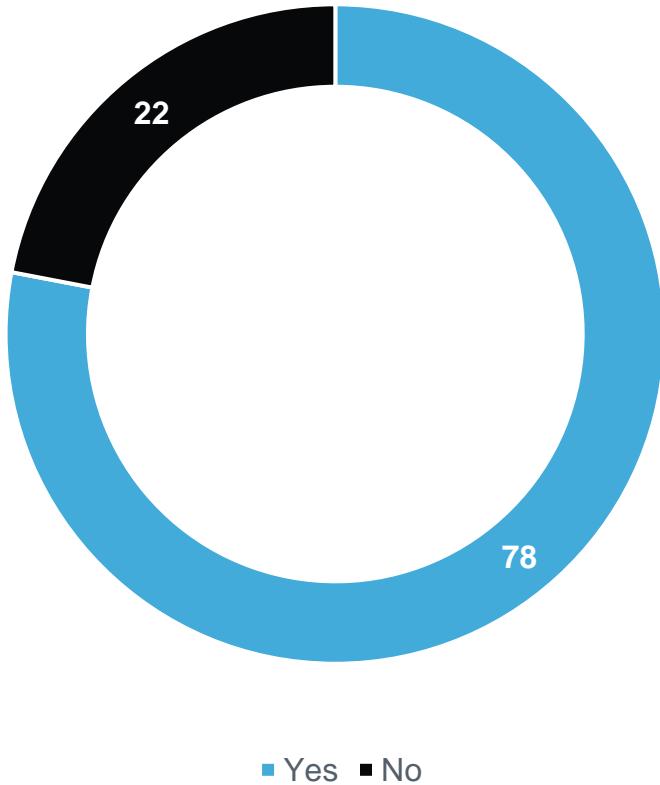
Q31 Would you encourage friends and family who live outside the Yarra Valley and Dandenong region to come and see a light-up, art and nature night-time experiences or event?
Base: all research participants $n=491$



Visitors to the region

Hosted visitors to the region

Over three-quarters (78%) of research participants have recently had a friend or family member visit the region.



Q13 Have you recently had a friend or family member visit the region? Base: all research participants $n=491$

Positive experiences for visitors

The perceived positive experiences of visitors who are family and friends relates to the natural environment and food, wine and dining.

Cultural experiences are low in the positive experiences for visitors.

This contrasts with the ideas for more events from research participants which are mostly indoor cultural events.

It is also possibly unfair to expect residents to have significant insight into tourism or event development.

	%		%
The natural beauty is incredible	60	Easy to get around, little traffic	14
So close to nature and State and National Parks	38	There is so much to do and see	11
Great cafes and restaurants	35	Cycling	10
They could undertake adventure activities they like (bushwalking, hiking, running, fishing etc.) other than mountain biking or cycling	31	Excellent and unique places to shop	10
Great wineries and cellar doors	30	Weather	7
Lots of open space and a lack of crowds	25	Mountain biking	7
Friendliness of locals	21	It has everything they wanted	6
Easy to get to	15	They did not have a positive visiting experience	2
They could undertake a range of cultural activities (i.e. markets, museums, galleries etc.)	14	Other	12

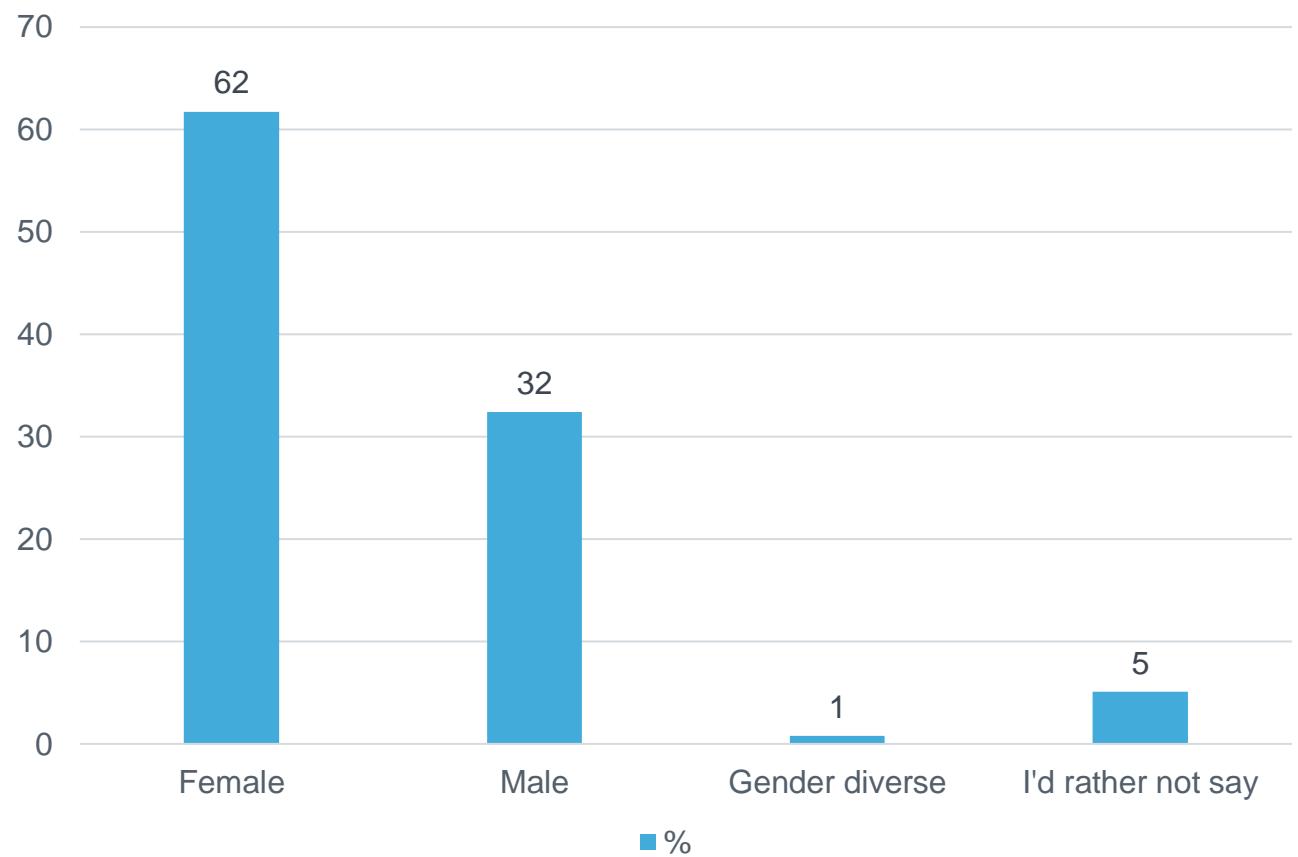
Q14 What were some of the key factors that positively impacted your friend's or family's most recent visiting experience? Base: those who have recently had a friend or family member visit the region n=381



Demographics

Gender

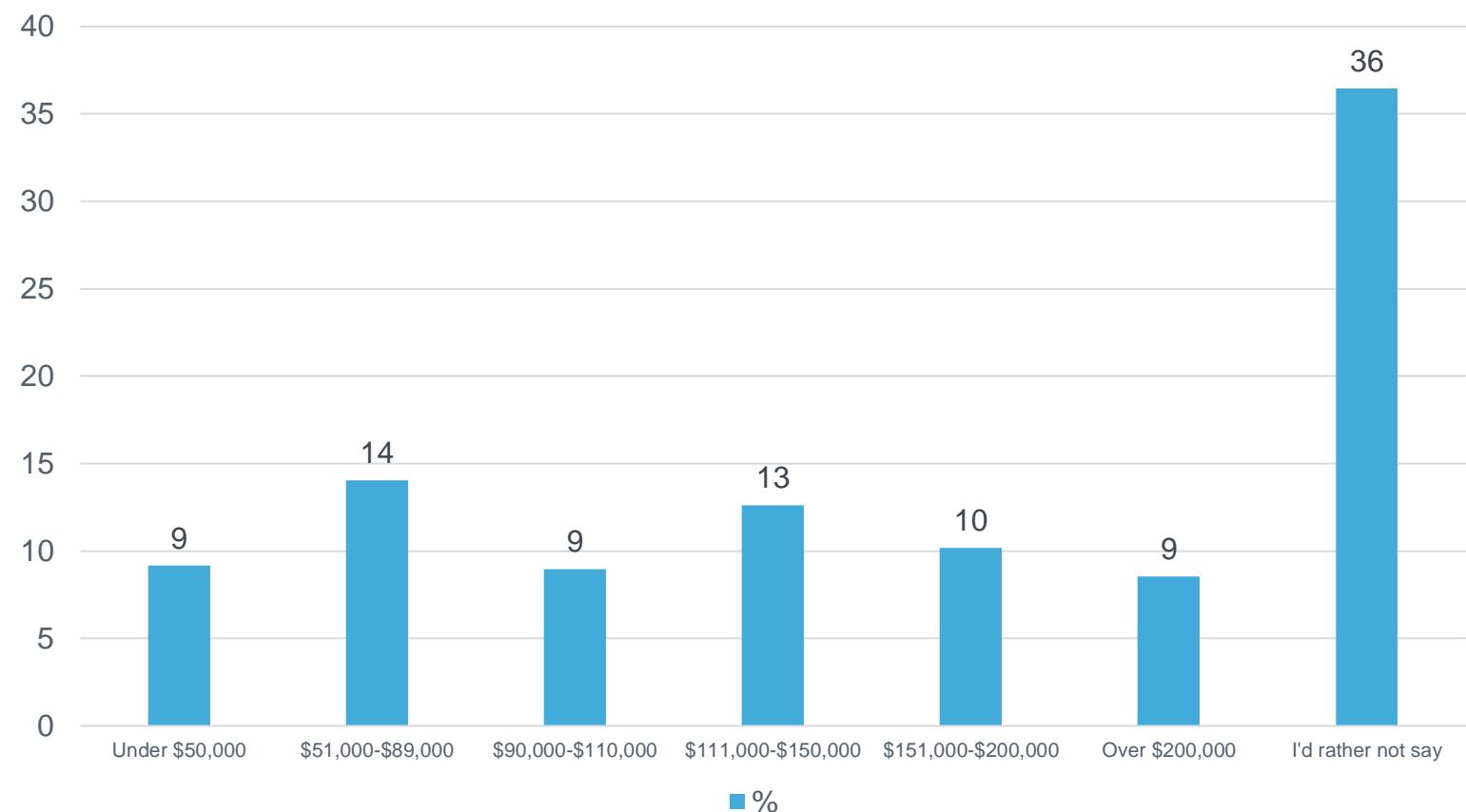
There is a skew in responses which came from women (62%). A random sample would give similar numbers of women and men.



Q17 Gender Base: all research participants *n*=491

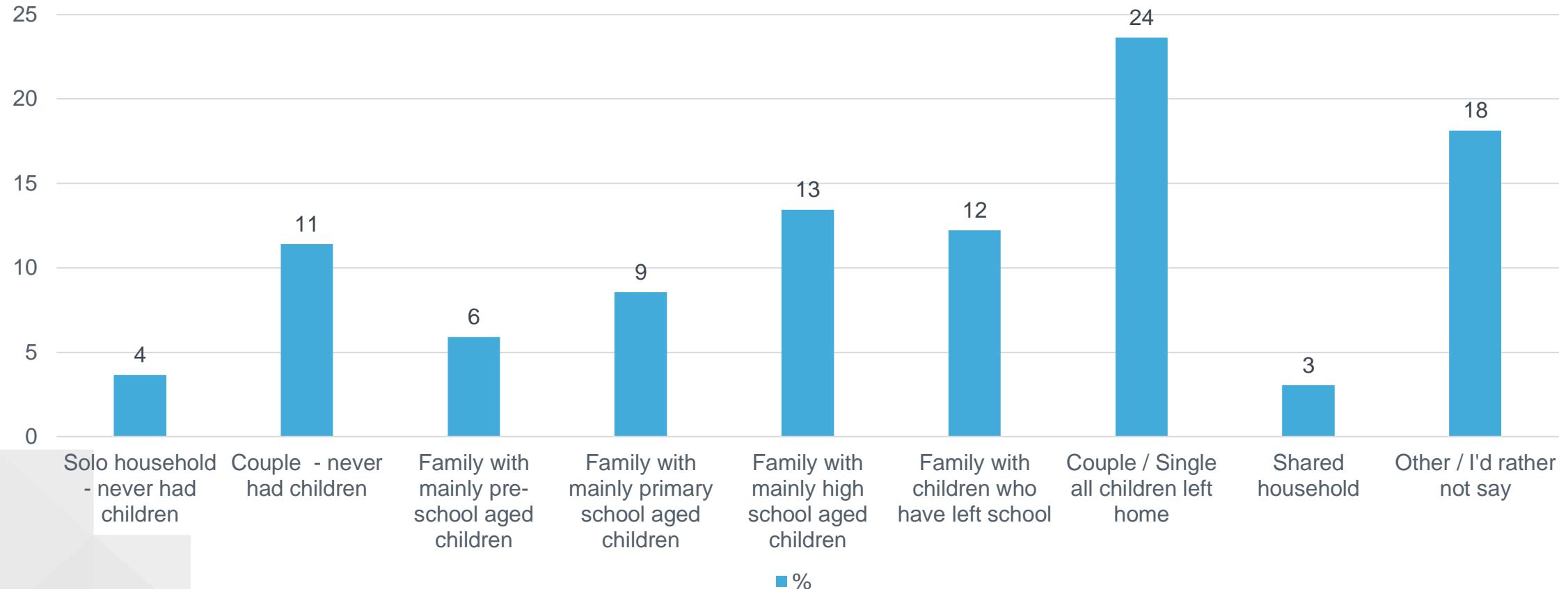
Household income

Household income analysis is hindered by the 36% who did not wish to leave their household income.



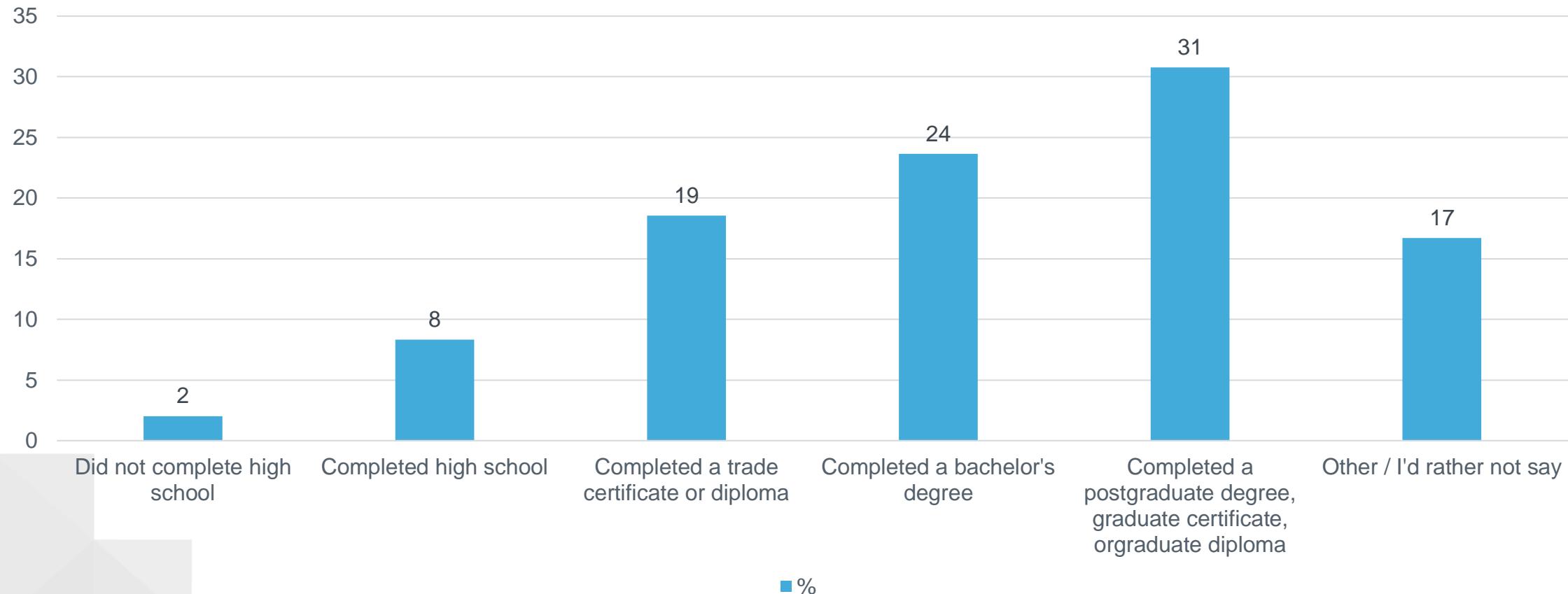
Q18 Household income

Household structure



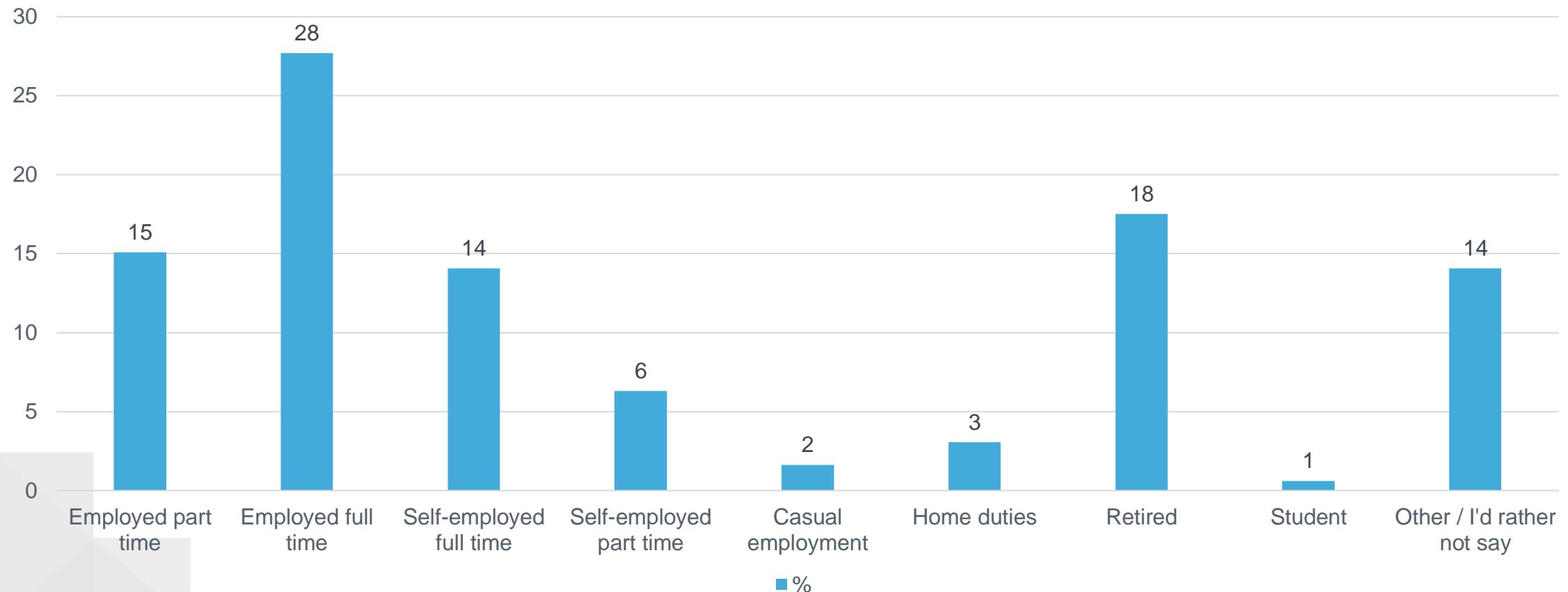
Q19 Household structure Base: n=491

Highest level of education



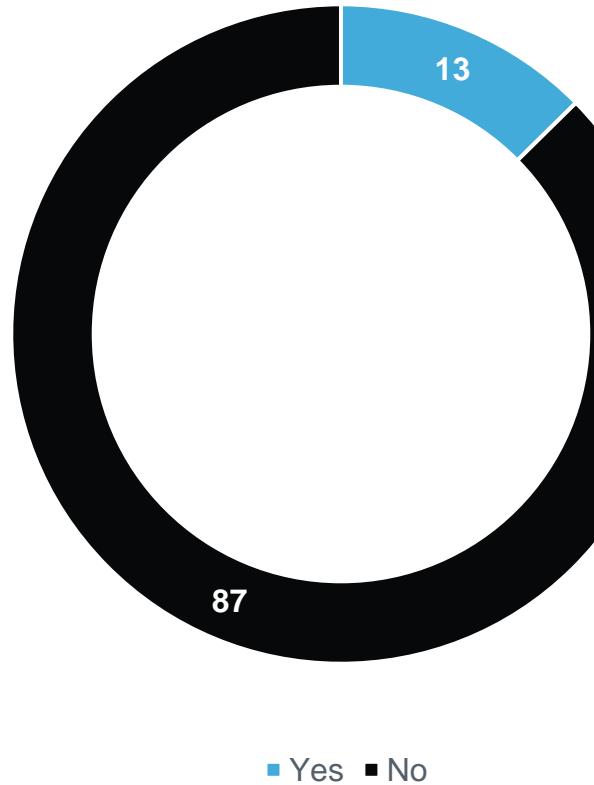
Q20 Highest level of education Base: all research participants n=491

Employment status



Q21 Employment status Base: all research participants $n=491$

Work in hospitality or tourism



Q22 Work in hospitality or tourism Base: all research participants



ODIN360

Steven Wright
Managing Director
ODIN360
0407800518
steven.wright@odin360.com.au

with
James Paterson
Managing Director
JMP Consultants
Market Research

james@jmpconsultants.com.au