

YARRA VALLEY AND DANDENONG RANGES

DESTINATION MANAGEMENT PLAN

DECEMBER 2023 VI.1

Contents

Welcome	4
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SECTION 1

A DESTINATION MANAGEMENT PLAN

1a. A Destination Management Plan (DMP) – what is it, and why do we need one?	7
1b. Adopting world’s best practice to develop a sustainable tourism destination	8
1c. Global trends: The future of tourism demand	11
1d. How this DMP was developed – the people and the process that helped shape this DMP	15
1e. Consultation findings – SWOT analysis	18
1f. Market research	20

SECTION 2

REGIONAL OVERVIEW

2a. Overview of the region	25
2b. Key regional measures	26
2c. Major attractions	34
2d. New and currently planned infrastructure	35

SECTION 3

HOW WILL SUCCESS BE MEASURED?

3a. Major challenges facing the Yarra Valley and Dandenong Ranges region	45
3b. Our core challenge	46
3c. DMP objectives	47

SECTION 4

SHARED VISION

4a. Developing a shared destination vision	50
4b. The Yarra Valley and Dandenong Ranges destination vision	51


SECTION 5

DMP INITIATIVES

5a. DMP framework	53
5b. Prioritisation of DMP initiatives	54
5c. 8 strategic priorities	56
5d. Additional regional initiatives	111

Glossary	126
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Yarra Ranges Tourism is grateful to the State Government through the Department of Jobs, Skills, Industry and Regions (DJSIR), Yarra Ranges Council (YRC) and Nillumbik Shire Council (NSC) for their funding contributions to producing this Destination Management Plan for the benefit of the Yarra Valley and Dandenong Ranges region.

A high-angle, vertical photograph of a winding asphalt road cutting through a lush forest. The road, marked with white dashed lines, curves from the bottom center towards the upper right. The forest is dense with tall, slender trees and large, vibrant green ferns. The lighting is soft, creating a serene and natural atmosphere.

We acknowledge the Wurundjeri Woi Wurrung, Bunurong and Taungurung peoples of the Kulin Nation as the traditional custodians of the lands and waters of the Yarra Valley and Dandenong Ranges on which we live, work and play and pay our deepest respect to Elders past and present.

Welcome

The Yarra Valley and Dandenong Ranges destination vision

Naturally impressive. Today and tomorrow.

The Yarra Valley and Dandenong Ranges (YVDR) is a place that locals cherish and visitors love to explore.

And for good reason.

The region's captivating natural attributes – winding trails, lush forests, mountain views, sparkling rivers and streams and abundant wildlife – offer beauty at every turn.

Local wineries top Australia's "best of" lists and independent brewers and distillers offer unique experiences. Fine dining and high teas in quaint towns provide the perfect outing.

Famous attractions – Puffing Billy Railway, Healesville Sanctuary, Redwood Forest, Montsalvat, Yarra Valley Chocolaterie, Tesselaar Tulip Festival – build happy memories for every generation.

A thriving arts and culture scene adds to the delight while wellness retreats and spa experiences take the relaxation factor to the next level.

For all these reasons, visitor enthusiasm for the YVDR is strong.

This is especially true when it comes to day trip visitors, with this dominant form of visitation set to double in the next decade. This poses a critical challenge for the region to manage.

Local people and businesses support tourism. They recognise the positive impact tourism contributes to the regional economy, creating new jobs and offering more attractions for locals to enjoy.

But this support is dependent on tourism development and growth being sustainable and regenerative.

In essence, this means being able to accommodate more visitors and offer more experiences, but without reducing the region's liveability and while ensuring the region's natural attributes remain preserved and protected.

Doing nothing is not an option. Without a

change in tourism strategy, visitor growth from an ever-expanding Melbourne population will increase congestion on local roads and in towns, putting pressure on existing amenities and negatively impacting the natural environment.

This DMP – the first ever for the YVDR – has been developed to address these challenges. It is a high-level 10-year plan that sets out the core strategic directions to deliver ongoing sustainable tourism for the region.

While this DMP sets a strategy across the entire YVDR region, sub-regional action plans have also been developed for each of the Local Areas – Western Yarra Valley, Yarra Valley, Upper Yarra Valley and Dandenong Ranges. These Local Area Plans (LAPs) align to this DMP.

This DMP outlines initiatives and investment opportunities for key areas – such as transport, accommodation, planning, food & drink, events and attractions – as well for continuing to improve essential services and local amenities. Each initiative helps meet four key objectives, which are all aligned to creating and ensuring sustainable tourism. They are:

1. Grow economic benefits of tourism by changing visitor travel behaviour
 - increase visitor yield and length of stay
 - shift day trip to overnight visitation
 - shift weekend to mid-week visitation
2. Improve the visitor experience
3. Improve liveability
4. Improve support for tourism in YVDR

Importantly, this DMP adopts a world's best practice sustainability framework. It ensures that Traditional Owner guiding principles and cultural values are also embedded in the delivery of this plan.

To give it the best chance of success, this DMP will be implemented and guided by engagement with state and local governments, industry and tourism

The Naturally Impressive vision was inspired by the region's strong connection to nature. It reflects a desire to impress visitors with the region's natural beauty and outstanding experiences and services that residents can also embrace and enjoy. It aspires to create a memorable destination that family and friends excitedly talk about as their next holiday destination.

businesses, workers, Traditional Owners, educational institutions, community organisations, local residents and visitors.

There are challenges to address, however these are outweighed by a unique and exciting opportunity – to harness a collective goodwill to prepare the region for the predicted future tourism demand whilst maintaining the "Naturally Impressive" appeal to visitors and locals.

TOURISM IN THE YVDR BY 2033

9+ million

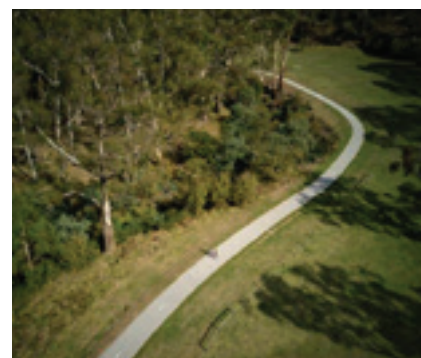
day trips to the region per year
(up from 4.5 million in 2023)

11,500

jobs

2.3bn

forecast visitor spend



Our aspiration for the region in 2033

The word is out. The Yarra Valley & Dandenong Ranges is a sustainable thriving tourism ecosystem and is on every travel guide's "must-see" list. Glowing endorsements from delighted visitors – who come from near and far – have generated a buzz about the region that grows stronger each year.

And the locals welcome it. They proudly visit the new and elevated attractions and come to enjoy the mountain ranges and rainforests. They're boosting their skills by taking up new job and career opportunities that continue to arise from tourism and economic growth in the area.

Cohesive planning has meant that new accommodation, attractions and experiences complement the region's natural and diverse beauty in a sustainable way. The region is more connected than ever. New and upgraded transport links provide sustainable and accessible travel options. Less traffic on local roads means a more relaxed vibe around town. It's great for the locals and visitors alike.

Haven't visited yet? Here's why you should.

Come for an escape, adventure or to just to take in the spectacular views – and a deep breath of fresh air. In and out. Relax. Do it your way or book into a wellness retreat in the Dandenong Ranges or indulge in a spa for some serious down time.

Getting close to nature is easy. Relax and enjoy the world leading Chelsea Australian Garden at Olinda. The world's best garden exhibit is in our very own backyard.

For the slightly more adventurous, experience the amazing scenery and views, whilst walking the incredible ngurrak barring | RidgeWalk across the top of the Dandenong Ranges. Learn about the rich culture and history of the First Peoples as you visit local towns and villages along the way.

Ride your bike or take a stroll from Lilydale to Warburton along the Yarra Valley Trail. Feast on prepared lunch packs from local bakeries, and then dip your toes in the Yarra River to cool off.



For the mountain bikers who like to take things to the max, we've got you covered. Experience the ultimate adrenaline rush as you ride the gold standard trails that make up the world class Warburton Mountain Bike Destination.

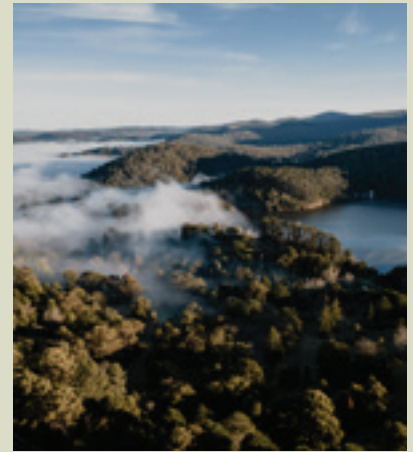
The region's long-standing and most popular attractions continue to be elevated to keep surprising and delighting both young and old.

Feel a hush descend as you tread quietly through the rows of gentle giant Californian Redwoods – the tallest trees in the world – at Redwood Forest. Bring the kids for the ultimate game of hide and seek. Set yourself a challenge and tackle the always popular 1000 Steps Walk. Enjoy vast dining views at SkyHigh at the top of Mount Dandenong or look down and marvel at the entire region on a crisp, blue-sky morning from a hot air balloon.

Catch a ride on the Puffing Billy Railway and watch its billowing smoke as it chugs between Belgrave and Gembrook, charming passengers with lush green scenery. The littlest travellers (and train enthusiasts!) also love jumping aboard the miniature Diamond Valley Railway.

Get up close to Australian wildlife at Healesville Sanctuary. Watch the birds of prey take flight in the spectacular bird show and see how injured birds are being given a second chance at flight at the Raptor Rehabilitation Centre.

And if it's arts and culture you crave, there's plenty of galleries showcasing unique art, including art



by First Peoples. Look no further than Montsalvat, Australia's oldest artists' colony, for broad brush inspiration. Or a contemporary experience at TarraWarra Museum of Art. Stop for a coffee in a town or at a quaint teahouse in Warrandyte, Eltham, Olinda or Sassafras for a scrumptious afternoon tea.

A bit of a night owl? That's fine too. The region lights up at night for spectacular sound and light shows, music concerts and events. Don't forget to grab a bite before or after the show at one of the world-class restaurants, hotels or market stalls that come alive in the evening.

Did someone mention wine and gin? Would be rude not to! If you fancy a drop, it could well be at one of Australia's top-listed wineries or distilleries. Pop into the new Food and Drink Centre and taste the freshest produce around. Pair your wine – or locally distilled gin or brew – with the latest harvest straight from the farm and enjoy fine dining throughout the region. For the ultimate foodie experience, come once, or several times, to the annual celebration that is the Yarra Ranges Food and Drink Festival.

Take in the spectacular view, wherever you are, one last time and reflect on a wonderful day. Breathe a happy sigh. Cosy down for the night at your local BnB, cottage, farm stay, holiday park or international standard hotel. We've got the perfect place waiting just for you. Sleep well. There's much more of this beautiful world to explore tomorrow.



SECTION I

**A DESTINATION
MANAGEMENT PLAN**

Ia. A Destination Management Plan – what is it, and why do we need one?

Yarra Ranges Tourism (YRT) has developed a comprehensive 10-year Destination Management Plan (DMP) for the Yarra Valley and Dandenong Ranges (YVDR) region. The DMP is underpinned by four Local Area Plans (LAPs) – Western Yarra Valley, Yarra Valley, Upper Yarra Valley and Dandenong Ranges.

What is a Destination Management Plan?

The DMP is a shared strategic plan that outlines the management and development initiatives for tourism across a region, such as the YVDR. It is a catalyst for a more connected and collaborative approach and includes a range of sustainable objectives and actions to enhance the benefits of tourism while minimising potential negative impacts.

The DMP is one of the key tools that supports tourism from state to local levels (see Diagram 1)

Aim of this DMP

The aim of this DMP is to help manage the YVDR for residents, visitors and industry over the next 10 years, in which time visitation to the region is forecast to increase significantly. To ensure future success, the DMP has been built with the collaboration of many groups, including Traditional Owners, state and local governments, tourism businesses, community organisations, local residents and visitors to the region.

Ultimately, the DMP aims to enhance the quality of life for YVDR residents, support industry and create a positive and sustainable experience for visitors.

At its core, the DMP seeks to enhance the benefits of tourism to the local economy and minimise related issues to grow the already strong “social license for tourism” among the local community.

In this context, the term “social license for tourism” refers to the local community’s level of support and acceptance of tourism in the YVDR.

DIAGRAM 1: YVDR Tourism Planning Framework



7 GUIDING PRINCIPLES FOR SUCCESSFUL DESTINATION PLANNING

Any DMP must:

1. **Build the social license of tourism** across the local community **and improve the liveability** of the region
2. Develop **regenerative and sustainable** tourism
3. Be **evidenced based** and **measurable**
4. Consider both **supply of product and experiences and visitor demand**
5. Be **innovative, visionary and achievable**
6. Support the **current** industry and **plan for the future**
7. Be supported by the **community, industry and key stakeholders**



I b. Adopting world’s best practice for a sustainable tourism destination

During the development of this DMP, one message was overwhelmingly clear; the region’s natural attributes are inextricably linked to why locals love living there. They are also what compels visitors to explore the region and help create a positive experience for them..

Combined with locals and visitors cherishing the region’s connection with nature, there is a strong collective commitment to respecting and preserving the environment and in doing so, maintaining its beauty for the region’s future generations.

As such, this DMP adopts a world’s best practice sustainability framework developed by the Global Sustainable Tourism Council (GSTC). This approach will ensure the Yarra Valley and Dandenong Ranges will be developed as a sustainable tourism destination.

Over the past 20 years, the concept of “sustainability” in tourism has influenced destination planning around the world. The GSTC criteria is consistent with, and supports the United Nations Sustainability Development Goals (SDG).

The GSTC then adapted its criteria to more clearly contribute to the application of the SDG.

As the GSTC states:

“Organisations and companies looking to contribute to the SDGs will find that the GSTC Criteria and other GSTC-Recognized Standards provide effective tools to help them rise to the challenge”.

In addition to the criteria, the sustainability measures of success include the effective management of:

- carbon emissions
- materials and waste
- natural and built assets
- happiness and wellbeing
- social and cultural health
- value and prosperity

To demonstrate the commitment of the region to sustainability a workshop was held at the 2023 YRT Annual Tourism

“SUSTAINABLE” AND “REGENERATIVE” TOURISM – WHAT’S THE DIFFERENCE?

In recent years, the term “regenerative tourism” has been developed due to the perceptions that the concept of sustainability is only about “not making things worse” rather than focused on “making things better”. Regenerative tourism was coined to highlight the importance of going a step further to “making things better”.

For the purposes of this DMP we have adopted the meaning of sustainable tourism to also include the regenerative concepts of making things better:

Summit. A graphic representation of the outcomes of that session is shown here and highlights the many facets of

sustainability that industry are addressing now and into the future of this DMP.



GSTC Sustainable Destination Criteria

The GSTC Criteria:

- serve as the basis for certification for sustainability,
- serve as basic guidelines for destinations that wish to become more sustainable,
- help consumers identify sound sustainable tourism destinations, and

- demonstrate leadership that inspires others to act.

The GSTC Criteria, as world's best practice in Sustainable Destination Development, have been used to develop the sustainability principles underpinning this DMP.



The GSTC Sustainable Destination Criteria are underpinned by four key areas with 10 modules and 176 individual indicators. The key areas and modules are:

		
AREA		MODULE
	<p>1. Sustainable Management Ensuring the region has a clear direction and is well managed</p>	<p>Management Structure and Framework Stakeholder Engagement Managing Pressure and Change</p>
	<p>2. Socio-Economic Sustainability Ensuring the benefits of tourism remain in the region for the benefit of locals and not just the visitors</p>	<p>Delivering Local Economic Benefits Social Wellbeing and Impacts</p>
	<p>3. Cultural Sustainability Ensuring the rich history of the First Peoples is told and embedded across the region and that their cultural sites are not only protected from damage but also enhanced</p>	<p>Protecting Cultural Heritage Visiting Cultural Sites</p>
	<p>4. Environmentally Sustainability Protecting the land upon which we live and visitors enjoy. Carefully manage visitors and protect the important Green Wedge areas.</p>	<p>Conservation of Natural Heritage Resource Management Management of Waste and Emissions</p>

SUSTAINABLE DEVELOPMENT GOALS

Through the preliminary analysis undertaken, it is expected that outcomes related to the following SDGs will be achieved:



All actions under the DMP will be linked back to this sustainability framework.

Applying these criteria to this DMP will support 14 of the 17 SDG



ECOTOURISM AUSTRALIA'S (EA) ROLE IN WORLD'S BEST PRACTICE

EA has created a proprietary framework that aligns the GSTC in an Australian context. Destinations, hotels and attractions are able to seek certification in Australia through EA. It is understood that both Nillumbik Shire Council and Yarra Ranges Council are considering EA certification for their Local Government Areas. If both Councils worked together to achieve this certification, with the support of YRT, this would assist in creating a more consistent approach to sustainable tourism across the whole region.

Ic. Global Tourism Trends: The future of tourism demand

In addition to the world-wide focus on developing sustainable tourism, there are several other emerging global trends that are relevant to YVDR.

Trends and experiences

In November 2022, Tourism Australia released a research report on the **Future of Global Tourism Demand**.

The research explored the key experiences that international travellers are looking for globally and by source market and highlighted the types of experiences that international visitors to Australia are seeking.

The report outlined overall key travel trends and identified seven broad clusters of desired experiences, five of which are directly relevant to the current planned product offerings and experiences in the YVDR.

Those five are:

- Sensory
- Adventure
- Nature
- Heritage
- Immersive

Each cluster is described below and with an attributed estimated number of interested travellers (in millions) per annum around the world.



Source: Tourism Australia, Future of Global Tourism Demand, November 2022.

SENSORY	ADVENTURE	NATURE	HERITAGE	IMMERSIVE
A focus on the environment via good food & drink, sightseeing and culture 122.9	Activity & exploration 117.4	Immersion in nature via landmarks and wildlife 107.2	Experiences a destination through its places and people 104.9	Learning & education 96.8
Popular experiences 113.6	Exploration 90.4	Wildlife 85.6	History 97.1	Eco Experiences 49.6
Food & drink 102	Journeys 75.4	Natural Environment 70.8	First Peoples 67.2	Agritourism 46.2
Wellness 89.6	Land & Sky 75.6			
The arts 76.3				

As an example, the rankings for the individual experience of the Sensory cluster are detailed below. It shows the importance of food and drink to the international travel market.

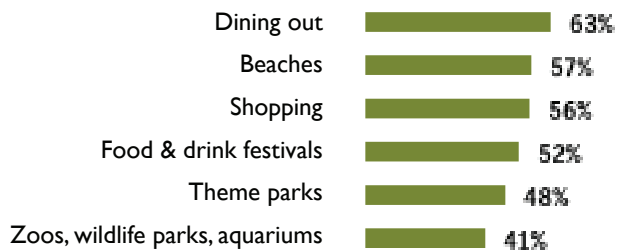
Bespoke experiences such as “bush tucker”, “tasting trails” and “meet the maker” are highly valued.

Tourism Australia also measured the top 10 experiences that people travelling to Australia are particularly interested in. Again, there is alignment with YVDR tourism where five of those experiences currently feature (and are proposed to feature under this DMP) as part of future tourism in the YVDR region. (See table)

Those five experiences include:

- Dining out – restaurants and street food
- Food and drink festivals
- Viewing natural landmarks and wonders
- Sites of historical or cultural significance
- Viewing wildlife in their natural environment

POPULAR EXPERIENCES



FOOD AND DRINK



EXPERIENCES IN DEMAND FOR TRAVELLERS CONSIDERING AUSTRALIA

The 10 experiences shown in the table below are in high demand among the 40 million Global Travellers who would consider Australia as a destination within the next four years.

Experiences in high demand (top 10) amongst travellers considering Australia as a destination		% interest	Estimated traveller population ('000s)	Global rank of experience amongst total out-of-region travellers
1 ST	Dining out e.g. restaurants, street food	70%	26,792	1 st
2 ND	Beaches e.g. swimming, relaxing, rock pools	64%	26,046	2 nd
3 RD	Shopping	63%	23,298	3 rd
4 TH	Food & drink festivals	60%	23,158	4 th
5 TH	Hot springs	57%	22,362	5 th
6 TH	Viewing natural landmarks and wonders	55%	20,936	7 th
7 TH	Theme parks	55%	20,375	6 th
8 TH	Sites of historical or cultural significance	52%	20,715	8 th
9 TH	Viewing wildlife in their natural environment e.g. safari, wildlife walk	50%	19,761	17 th
10 TH	Architecture, notable buildings or monuments	50%	19,311	9 th

Source: Tourism Australia

These findings also concur with consumer research carried out by ODIN360 on the Australian domestic market's preferences, which are detailed overpage [page 16].

Other key tourism trends identified in the Tourism Australia report include a preference for the following.

Travellers specified their sustainable travel preferences were based on four core principles:

- Do not harm. Leave destination as found.
- Try to take up sustainable options when available or offered
- Follow local sustainable practices (regarding environment, culture, community and economy)
- Avoid unsustainable harmful practices

Directions for developing First Peoples experiences products:

- Create an awareness of First Peoples experiences
- Build trust and authenticity
- Focus on cultural immersion

Importance of inclusive tourism

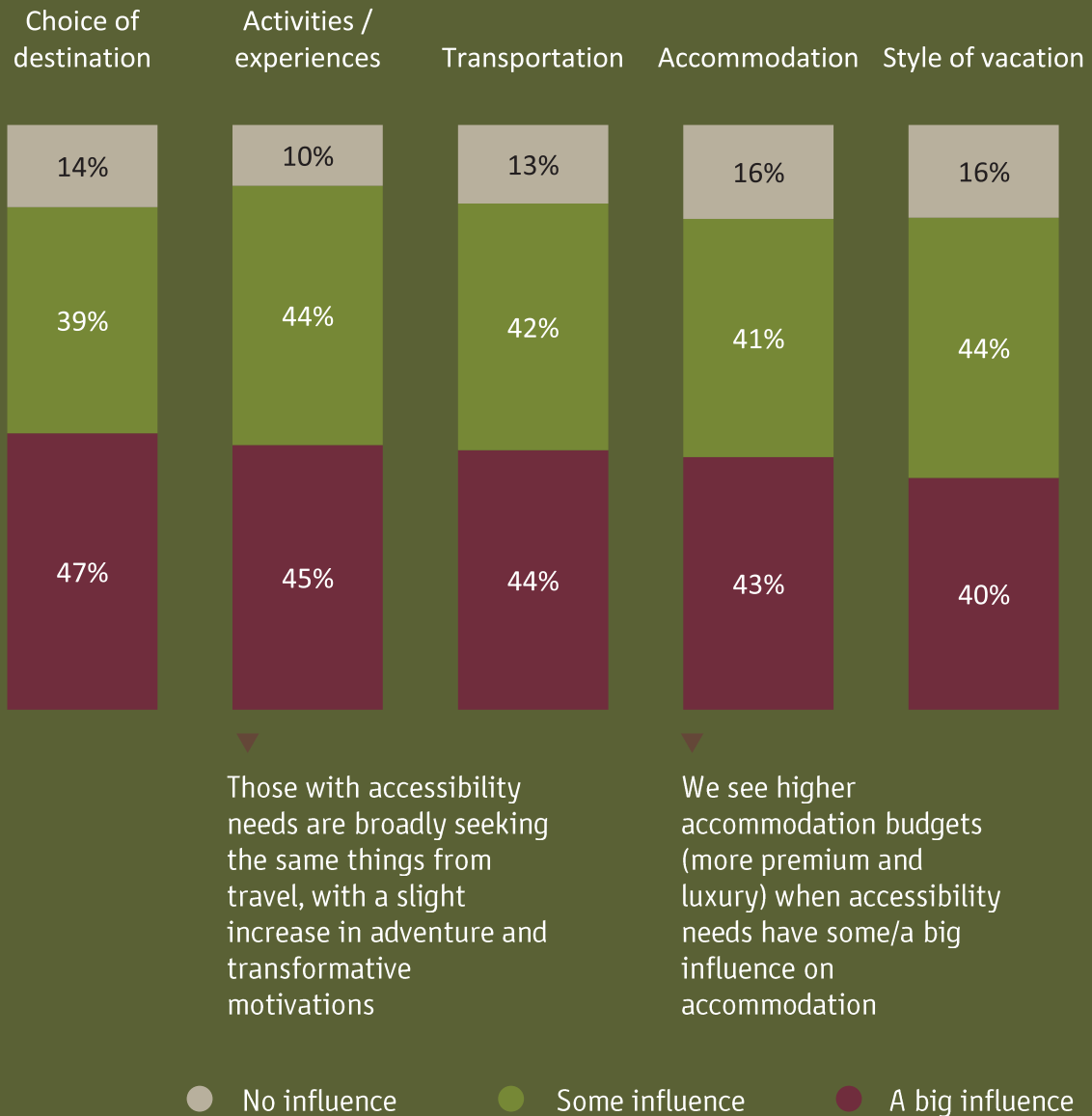
With an estimated 24%* of the population having accessibility needs, it is important that tourism operators address the needs of this market. The fact that a person has accessibility needs has a significant impact on that person's choice of:

- Destinations
- Activities and experiences
- Transportation
- Accommodation
- Style of holiday

*Source: Future of Global Tourism Demand, November 2022, p116, Tourism Australia

INCLUSIVE TOURISM TODAY

Travel intentions are the same with or without accessible needs, but the reality forces a different experience. Travellers with accessibility needs seek similar experiences and want to travel for similar reasons, however, their accessibility needs have a big influence on travel especially choice of destination, style of vacation, activities/experiences, accommodation and transportation once there.



Each of these trends and preferences have been considered and included as part of the key actions to be implemented in this DMP.

Id. How this DMP was developed

The people and the process that helped shape this DMP

The development of the DMP and its future implementation have been, and will be, guided by engagement with Traditional Owners, state and local governments, tourism businesses, community organisations, local residents and visitors to the region.

Thank you to each group for sharing their valuable insights and experiences.

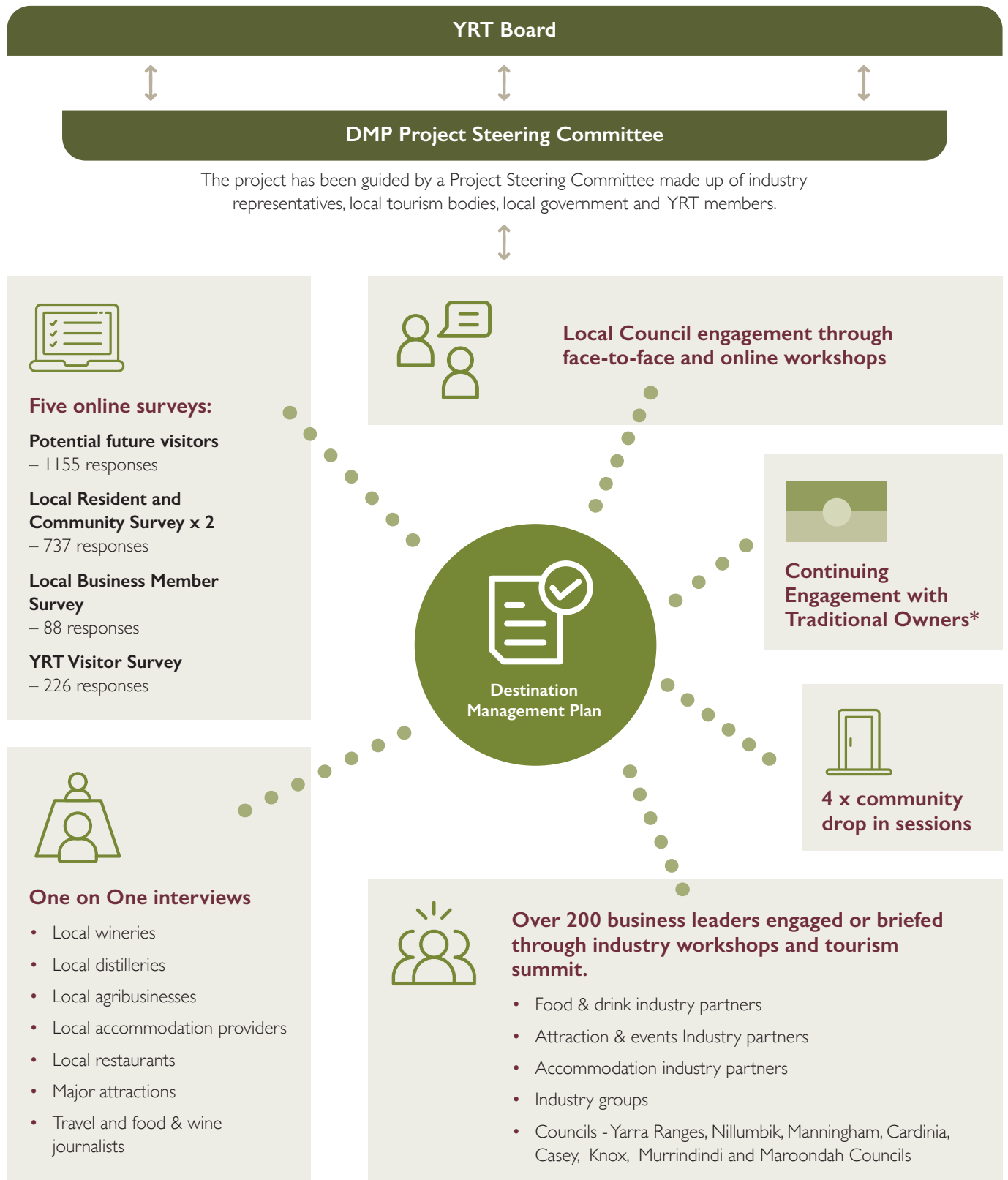
The Yarra Ranges Tourism (YRT) Board oversaw the entire project process, which was guided by a Project Steering Committee comprising industry representatives, local tourism bodies, local government and YRT Board and staff members.

Created with and for local communities

More than 2,000 people provided input to this DMP and the four LAPs.

Tourism takes place in, and cannot be separated from, the community. It is crucial to understand what the people of the YVDR want from the visitor economy. The destination planning consultation process was designed to ensure the DMP addresses community needs and outcomes.

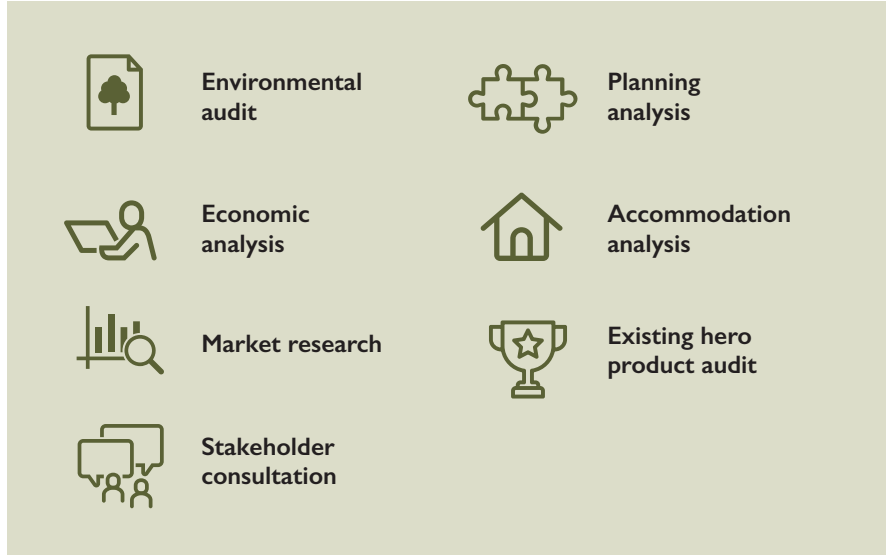




*Consultation was conducted with Wurundjeri Woi-wurrung Aboriginal Cultural Heritage Aboriginal Corporation, Bunurong Land Council Aboriginal Corporation and Taungurung Land and Waters Council

Understanding the region

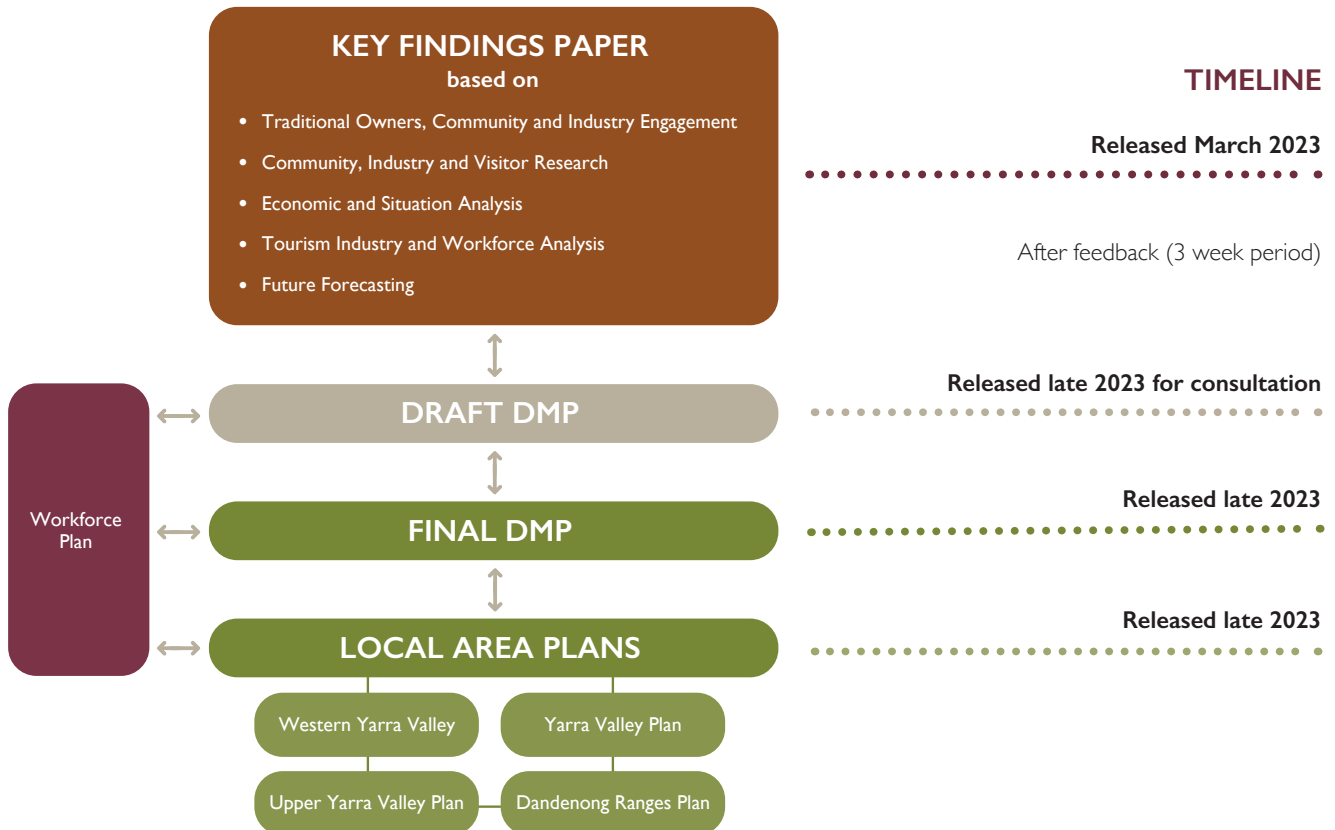
As part of the situational analysis, extensive research helped to understand and give light to the impact of tourism in the region and the issues and opportunities it presents.



DMP development

A series of important steps were taken when developing this DMP to ensure that representatives of all stakeholders were involved and their views were considered. An overview of that process, which included the development of a Key Findings Document, Workforce Plan, Draft DMP that culminated in the Final DMP and LAPs is shown here:

How was this DMP developed?



I.e. Consultation findings – SWOT analysis

SWOT Analysis Overview

The research, consultation and engagement has helped formulate this overarching analysis of the Strengths, Weaknesses, Opportunities and Threats (SWOT) of the region:



STRENGTHS

What is great about tourism in the region?

- Residents love the lifestyle of the region with the peace and quiet and being close to nature
- Location: Close proximity to Melbourne, yet parts of the region still remain “undiscovered”
- Natural attributes: Open green spaces and link to the Yarra River. Strong trails network facilitating hiking, biking (mountain bike and cycling) and water-based activities on the Yarra River
- Food and beverage options: Many wine and dining experiences
- 9 in 10 residents believe that tourism is important for the region
- Home for creatives and “makers”: From artists, to local farmers, winemakers, brewers and distillers
- Puffing Billy, Yarra Valley Chocolaterie, Healesville Sanctuary, Natural landscape and Wineries are key reasons for visitation
- Arts and culture experiences across the region
- North-East link access in 2028
- Diverse all-seasons destination



WEAKNESSES

What could be better about tourism in the region?

- Over indexed day trip visitation
- Limited mid week and night-time economy for locals and visitors
- Awareness of the region in high value target markets – international and interstate
- Transport around the region
- Mid-range and lower-cost accommodation options, including for family and workforce
- Services and infrastructure – roads, public transport, waste management, WIFI
- Beautification of township and place making
- Knowledge of diversity of experiences among local residents and the broader market
- Accessibility – walkability, proximity, disability consideration
- Perception of the area as a worthwhile investment
- Yarra Valley has a lower share of total leisure visitor nights who visit wineries on their trip than do Australia’s other premier wine-growing areas
- Lack of sufficient signature or high profile food and drink products
- Workforce skill gaps and shortages in key roles
- Access to government funding for the region due to classification as a subset of Melbourne metropolitan area.

Eligibility for Funding

During consultation it was evident that the YVDR region faces challenges accessing funding due to its classification as a subset of Melbourne. The YVDR visitor economy was one of the region's most heavily impacted by COVID-19. One of the reasons YVDR was impacted more than other regions was because it was caught up in the greater Melbourne lockdowns. It was therefore not eligible for much of the visitor economy recovery funding that was made available to broader regional Victoria. This is a continuing issue for YRT, as the YVDR region is not eligible for funding that other tourism regions designated to be outside the greater Melbourne area can access.

Advocacy will be required to identify the need for the YVDR region to be treated similarly to other regions.



OPPORTUNITIES

What opportunities are there to provide more sustainable and regenerative tourism in the region?

- Create a sustainable tourism industry and visitor economy that supports the local community ie, permits to include sustainable principles
- Capitalise on structure and township plans
- Facilitate and streamline planning to encourage investment in accommodation, existing attractions and opportunities in Special Use Zones (SUZs)
- Advocate for planning scheme reforms to encourage sustainable investment
- Improve stakeholder collaboration across high-interest projects and advocacy for shared projects
- Develop a sustainable signature event showcasing the core product priority strengths of the region
- Integrate event opportunities, ie, outdoor and trail activity with festivals, events, open studios etc.
- Build a central experience visitor hub, including central cellar door and agribusiness markets
- Develop a traffic masterplan, including for park and ride options
- Develop a Yarra River masterplan across multiple Councils to boost access for canoeing, kayaking and other water activities
- Raise awareness of region's trails and the arts, culture and heritage experiences across the region
- Integrate Traditional Owner stories and other historical stories into the region
- Elevate wellness opportunities to become known as the next "wellness hub"
- Continue to develop food and cellar door experiences to match the high standard and reputation of the region's wine and distilleries, breweries & cider houses
- Increase length of average visitor stays, and boost mid-week stays
- Broaden night-time experience for locals and visitors. This will also assist with workforce issues
- Complementary Local Tourism Associations which support each other and YRT and actively contribute to the destination vision, with 'place-based' focus and expertise.



THREATS

What issues threaten tourism activities in the region now and in the future?

- Over tourism of the region from day trippers now and into the future
- Limited ride share or taxi systems in the region
- Planning scheme is complex and in order to undertake reform it needs support of local councils and State Government
- Planning Scheme controls are costly and complex for landowners to navigate
- Duplication of local tourism associations and services
- Weekend road congestion
- Climate change impacts, ie, floods and bushfires, reduce the sense of safety in the region for visitors and local community
- Affordability of accommodation, food and tourism related activities is a concern for visitors
- Housing – Airbnb taking rental properties out of local housing market, and short supply of low-cost housing for workforce
- Labour force issues – especially mid-week impacting service and experience, prompting visitation to move to weekend
- Visitor accommodation doesn't meet demand, hampering ability for overnight and longer stays.
- Insurance coverage for businesses
- Cardinia Shire Council yet to publish a Green Wedge Management plan

If. Market research

More than 2,200 visitors to the region and local people and businesses were surveyed as part of the market research that helped inform this DMP.



778
local residents



88
local businesses



1,381
visitors from Melbourne,
Regional Victoria and NSW

What survey respondents shared

The YVDR tourism industry has much to be proud of. It was clear that the majority of respondents – local residents, businesses and visitors – love and are proud of the region's natural beauty.

There was also strong support for the wineries, cafes and restaurants, as well as key attractions – Puffing Billy Railway, Healesville Sanctuary, Yarra Valley Chocolaterie and Ice Creamery and SkyHigh Mount Dandenong.

While there are challenges to overcome, particularly after the COVID-19 pandemic led to visitation dropping further in this region than any other tourism region in Australia, there is much optimism for ways to progress the region.

Local residents and businesses understand that tourism is very important to the region. They generally support tourism growth, with businesses supporting stronger growth than residents.

In terms of tourism development, it's important to note that local residents and businesses overwhelmingly support "sustainable tourism". There seems to be a shared understanding that poorly considered tourism development would impact residents' satisfaction with living in the region and detract from the visitor experience.

Some of the key reasons that people visit the region are to: escape the city and suburban hustle; enjoy a close, quiet connection with nature; enjoy local wine

and produce; and experience time in an intimate and relaxed setting.

In terms of enhancing experiences in the region, there were some clear attractions that all groups believed would strengthen the region's appeal.

Top 3 tourism attractions desired by residents

1. Food and wine showcases from local producers (meet the winemaker / brewer / distiller evenings / dinners)
2. Evening / night activities / experiences (sound and light shows or similar)
3. Garden exhibits (botanic gardens, floral displays)





LOCAL RESIDENTS' INSIGHTS

“ We love the lifestyle of our region. It's peaceful, close to nature and people are friendly. ”

“ We enjoy natural beauty and open spaces, as well as cafes and restaurants. ”

“ Tourism is important but we have a strong preference for sustainable growth. We do not want tourism growth to have a negative impact on our lives or the environment. ”

94%

believe “life is good” in the region

86%

agree that tourism is “very important” or “important” to the region

3 to 4 days

is what 40% of residents believe to be the ideal time for visitors to experience the region

3 in 4 people

support sustainable growth

75%

say Local and State Government support for tourism is important

65%

do not support using local residents' rates to support tourism



Some residents identified concerns about tourism that required attention in the DMP.

These included:

- potential overcrowding and congestion
- potential negative impacts on the environment, such as litter
- too much demand on local roads and public facilities, such as public toilets
- impacts to the region's liveability, and
- possibility of overdevelopment and increased land use.



LOCAL BUSINESS INSIGHTS

“
Tourism is critical to our region and our business, and we’re ready for a change in the image of tourism in the region.
”

“
We want growth but are mindful of overcrowding and congestion.
”

“
We need continued local and state government support to thrive.
”

99%

say tourism is critical to the region...and 90% agree it's vital for their business

50%

want strong growth for tourism...but only 30% expect to see strong growth

80%

believe State Government support is “extremely important” for tourism

78%

say Yarra Ranges Tourism is either “strongly” or “somewhat” supportive

69%

say it's acceptable to use ratepayer funds to increase tourism

70%

are affected by skills gaps including experienced staff shortages and lack of trained or quality staff





VISITORS INSIGHTS

“
 The natural beauty of the region was the most satisfying part of our visit, and we also enjoyed the great cafes and food and wine experiences.
 ”

“
 The vast majority of us have a positive experience visiting the region.
 ”

“
 The area is most appealing to those of us living in Victoria, but our friends in NSW likely just need to become more aware of the great things on offer.
 ”

What could entice visitors to stay longer?

The research findings suggest that the following activities are likely to encourage visitors to stay longer in the YVDR:

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

- **TOP 5 CONSIDERATIONS FOR A LEISURE HOLIDAY** include: value for money (61%), nature and natural beauty (42%), quality accommodation (38%), good food and wine (38%), safety and security (31%)
- **KEY ACTIVITIES VISITORS PRIORITISE ON A LEISURE HOLIDAY** include: dining out (56%), markets/shopping (45%), sightseeing (45%), visiting friends and relatives (40%), outdoor and nature (34%), wineries and wine tasting (25%), wellness (15%)
- **FOR THE YVDR REGION THE TOP 5 REASONS FOR VISITING** were: to explore the region, explore nature (23%), visit wineries (21%), visit family & friends (21%), "I had not been before" (17%) and visit Healesville Sanctuary (17%)
- **TOP 5 REASONS FOR A POSITIVE EXPERIENCE IN THE YVDR REGION** were: natural beauty was incredible (57%), great cafes and restaurants (45%), open space, lack of crowds (37%), easy to get around (36%), friendliness of locals (33%)
- **TOP 5 REASONS TO MAKE VISITORS STAY LONGER** would be: food and wine showcases (43%), night activities / sound and light shows (31%), night-time exhibits (28%) garden exhibits (26%), wellness resorts or experiences (25%)

#1

ranked regional destination for Melbourne and Victorian residents

Up to age 54

are most likely to find the region appealing

Recent visitors have good memories with people who have visited in the last five years more likely to see the region as appealing

Young families

with pre-school kids (77%) and primary school-aged kids (57%) are more likely to be recent visitors

2 out of 3

visitors from Melbourne made a day trip to the region

SECTION 2

REGIONAL OVERVIEW

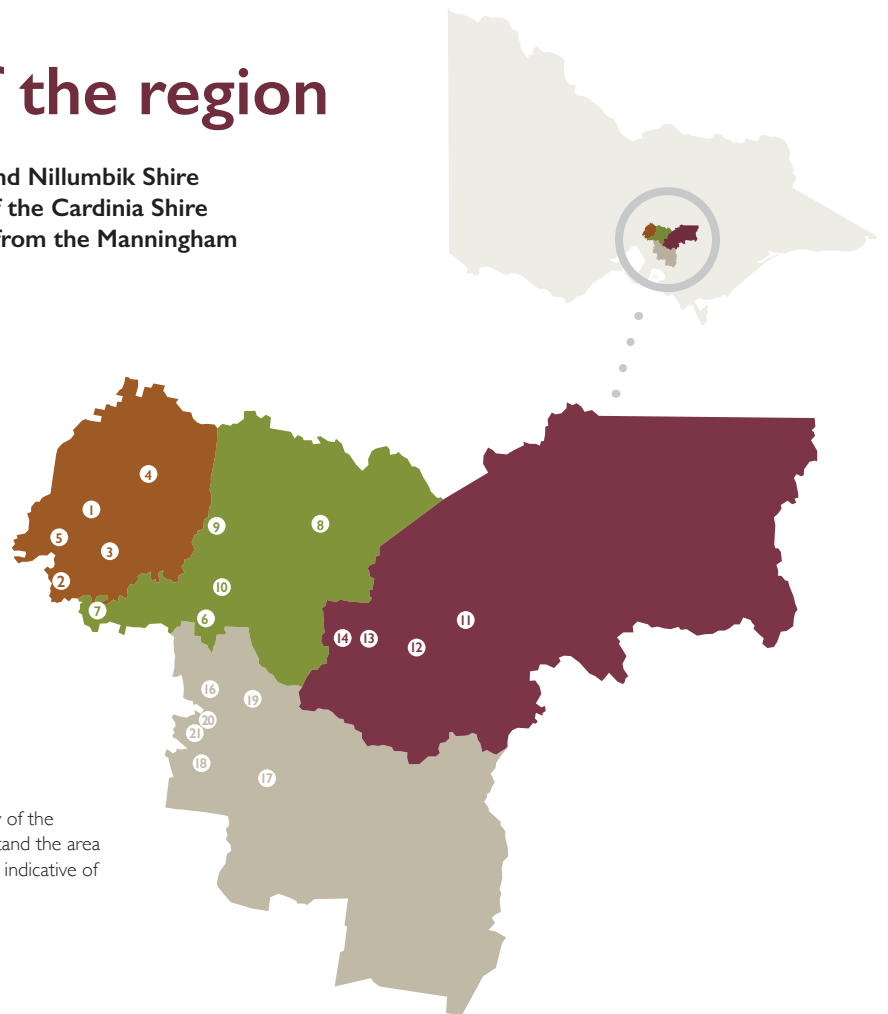


2a. Overview of the region

This DMP includes all of the Yarra Ranges and Nillumbik Shire Council areas. In addition, it includes part of the Cardinia Shire Council area plus Warrandyte-Wonga Park from the Manningham City Council area.

The four LAP areas are:

- Western Yarra Valley
- Yarra Valley
- Upper Yarra Valley; and
- Dandenong Ranges



Note: The towns listed provide an overview of the geography of the regions and are placed on the map to help the reader understand the area in reference to the towns listed. This list is not intended to be indicative of the strategic importance of tourism in the region.

Regional Visitor Profiles

YRT commissioned Customer Frame in September 2022 to undertake an extensive project to create a common set of customer profiles/visitor personas for the YVDR region. This would enable industry to:

- develop a collective and harmonised view of the customer
- enable a clear, consistent and common understanding of the region’s tourism customers, beyond demographics alone, and
- help drive deeper customer empathy, find new opportunities and help the region become more resilient from disruption.

Those personas are currently available for YRT partners to use as a partnership benefit. Personas assist those with and without marketing skills in their business to be more consistently targeted with their promotional efforts. In conjunction with YRT’s personas it is important to note that Visit Victoria also has personas which underpins Visit Victoria’s drive and fly marketing and work will need to be undertaken to identify how this could be used to inform industry in building their products and services for the region. More information on YRT’s personas can be found in the **Marketing & Distribution section on page 96.**



WESTERN YARRA VALLEY

Local towns include:

- 1 Hurstbridge
- 2 Eltham
- 3 Kangaroo Ground
- 4 St Andrews
- 5 Diamond Creek



YARRA VALLEY

Local towns include:

- 6 Lilydale
- 7 Warrandyte
- 8 Healesville
- 9 Yarra Glen
- 10 Coldstream



UPPER YARRA VALLEY

Local towns include:

- 11 Warburton
- 12 Yarra Junction
- 13 Seville
- 14 Wandin North



DANDENONG RANGES

Local towns include:

- 16 Mount Dandenong
- 17 Emerald
- 18 Belgrave
- 19 Silvan
- 20 Olinda
- 21 Sassafra



These local areas were developed based on detailed economic analysis of the visitor economy in each region. This included:

- size of the visitor economy
- international / national visitor profile
- length of stay
- activities and attractions in each area; and
- day trip versus overnight visitation.

For example, Yarra Valley has a much higher percentage of international visitors than Upper Yarra Valley. Whilst Upper Yarra Valley has the highest percentage of day trips.

2b. Key regional measures

There are a number of measures that help define the role of tourism and its impact on the local economy.

They include:

- Population
- Visitation
- Tourism spend
- Employment and workforce

Population

Population growth and its impact

Rapid growth is expected for populations in neighbouring regions to the north west and south of YVDR. The Victorian State Government forecasts that Melbourne will grow quickly from 4.7 million to 6.9 million residents between 2016 and 2036.

The threat is that the YVDR region will become even more of a “day trip on weekends” dominated destination leading to the predicted doubling of visitation over the next 10 years.



Population Changes to 2036:

• Cardinia	66% growth	with 71k new residents
• Casey	54% growth	with 182k new residents
• Whittlesea	63% growth	with 141k new residents
• Hume	54% growth	with 120k new residents

Visitation

Given the ease of accessibility to the YVDR from Melbourne, day trip visitation from outside the region is high.

Place of Interest	Domestic Overnight Visitors staying outside YVDR region	International Overnight Visitors staying outside YVDR region
Healesville Sanctuary	62% (59k)	90% (72k)
Yarra Valley	68% (192K)	96% (255k)
Puffing Billy Railway and Dandenong Ranges	62% (372k)	94% (334k)
More than one of these places of interest	64% (571k)	95% (537k)

Source: TRA, National and International Visitor Survey data 2015-19

The YVDR region is also a major contributor to the broader Victorian visitor economy with more than 2.8 million international adult visitors to Victoria over the five years to the end of 2019.

Source: TRA, National Visitor Survey 5 year average to end of 2019.

Day trip challenge

YVDR has the highest ratio of day trips to overnight stays in Victoria.

- For every one holiday overnight visit there are 10 day trips to the YVDR region. The total ratio of day trip visitors to total overnight visitors in 2022 was 5.8 to one.
- Macedon Ranges has the next highest ratio of seven day trips for every one holiday overnight visit.
- Geelong and the Bellarine, Mornington Peninsula, Ballarat, Goulburn are all at three day trips for every one holiday overnight.
- The state average without YVDR is two day trips for every one holiday overnight.

Value of visitation types to the region

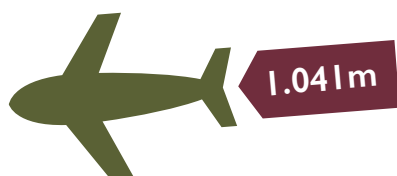
- International overnight = \$3,404*
*includes education and employment visitation which cannot be separated
- Domestic interstate = \$584
- Domestic intrastate = \$599
- Daytrip = \$97

Source: TRA Regional Tourism Satellite Account and NVS and IVS data for 2018-19



Total international visitor nights

Interestingly, the biggest area contributing to international visitor nights in the YVDR region is the populous Pakenham North East area (328,000 average over the three years) well ahead of Eltham (68,000) and Healesville/Yarra Glen (59,000).



The core driver of international overnight stays is visiting friends and relatives (VFR), well ahead of holiday, employment and education.

However, at a more local level the share of VFR and holiday in total international visitor nights varied widely for the three years ending 2019. Areas with a higher share of recent local migrants to Australia often have a high share of VFR in total international visitors.

Share of International Visitor Nights in YVDR Region for the three years ending 2019

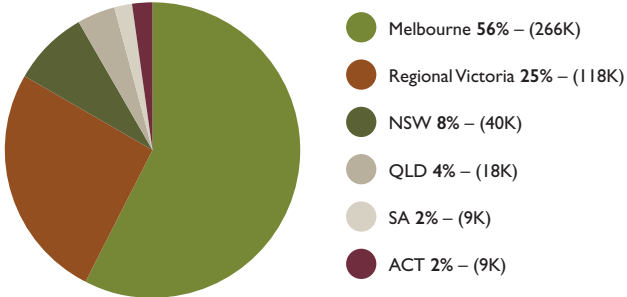
Holiday	29%
Visiting friends and relatives (VFR)	45%
Business	4%
Employment	11%
Education	7%
Other reason	4%

Source: TRA data 3 year average to 2019, International Visitor Survey – See Glossary for a definition of International Visitor Nights



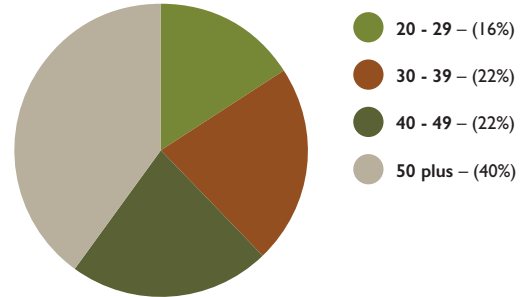
Where the domestic overnight visitors to YVDR came from:

More than 50% of Australians who visit the YVDR and stay overnight are from Melbourne, with 25% from Regional Victoria. NSW is next biggest source market with 8%. QLD is next biggest source market with 8%. SA 2% - (9K) and ACT 2% - (9K).



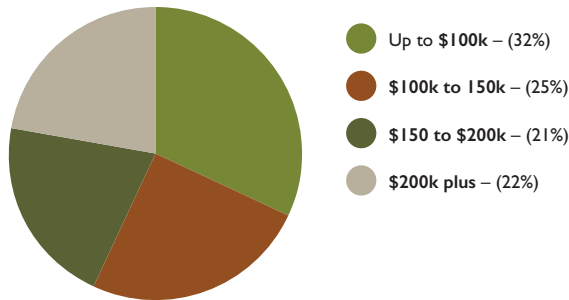
Age of the domestic overnight visitors to YVDR:

40% of domestic overnight visitors are aged over 50. Slightly more are aged between 30-49yo.



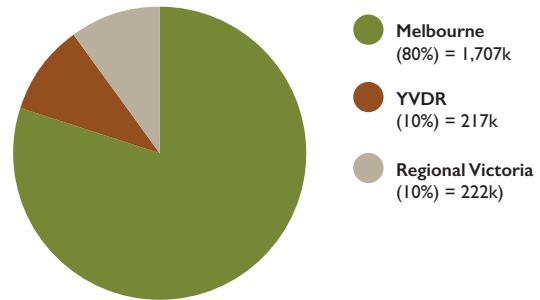
Income levels of domestic overnight visitors to YVDR:

Just under 50% of the domestic overnight visitors to the YVDR earn between \$100-200k. Approximately, a third earn under \$100k. This will include 'asset rich' retirees but whose income is under \$100k.



Domestic holiday day trip by origin

80% of domestic day visitors are from Greater Melbourne. 10% are from YVDR visiting other areas in the region.



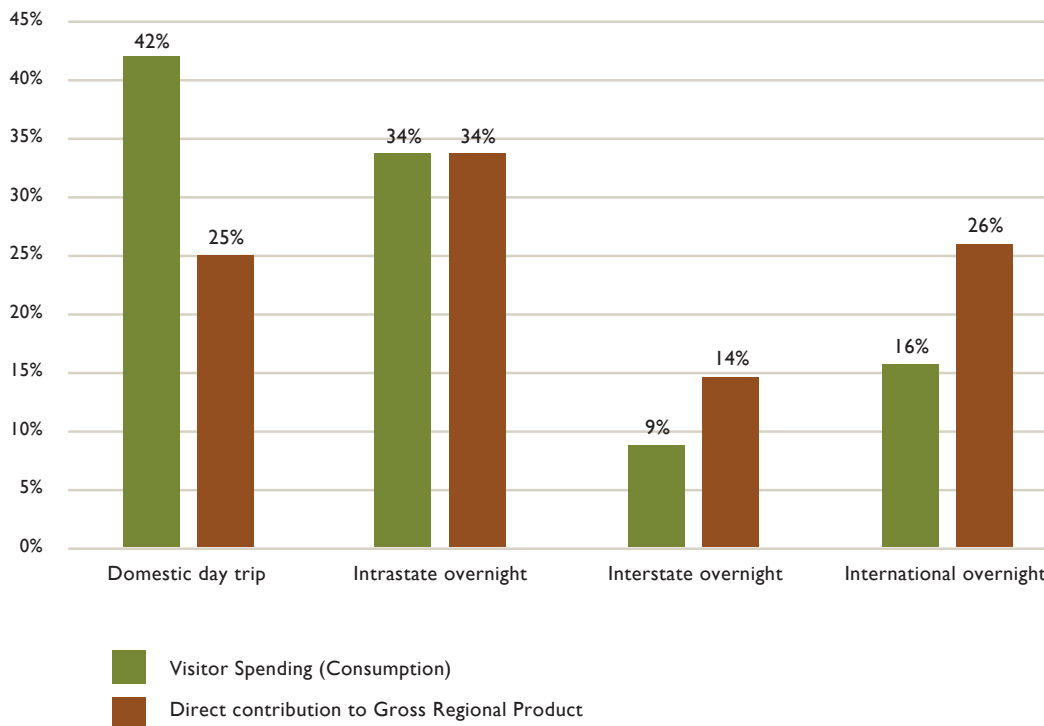
Tourism spend

Contribution to the broader economy by visitor type

Overnight visitors provide significantly more impact to gross regional product.

Shares by type of tourism of Yarra Valley and Dandenong Ranges Region Visitor Spending and Direct contribution to Gross Regional Product (%) in 2018-19

Source: TRA Regional Tourism Satellite Account



“Visitor spending” is the amount of money spent by visitors in the region. For example, buying a loaf of bread in Eltham made outside the region, has less economic benefit for Eltham than staying overnight in local accommodation and eating in a restaurant where the food is prepared and served by local staff. The gross regional product is this second measure.

Value of visitation types to the region

The different types of visitors to the YVDR spend vastly different amounts of money. Those who stay overnight spend significantly more money than those who undertake day trips.

- International Overnight = \$3,404* (*includes education and employment visitation)
- Domestic Overnight Interstate = \$584
- Domestic Overnight Intrastate = \$599
- Daytrip = \$97

Source: TRA Regional Tourism Satellite Account and NVS and IVS data for 2018-19

Household income and spending per domestic visitor night

Unsurprisingly those who have higher incomes spend more money in the region per trip.

National data from TRA shows that in 2021/22, spending per domestic visitor night was:

- \$136 for households with incomes under \$70k;
- \$204 for households with incomes from \$70k to \$150k;
- \$250 for households with incomes from \$150k to \$200k and
- \$296 for households with income over \$200k.

Employment

Workforce opportunity

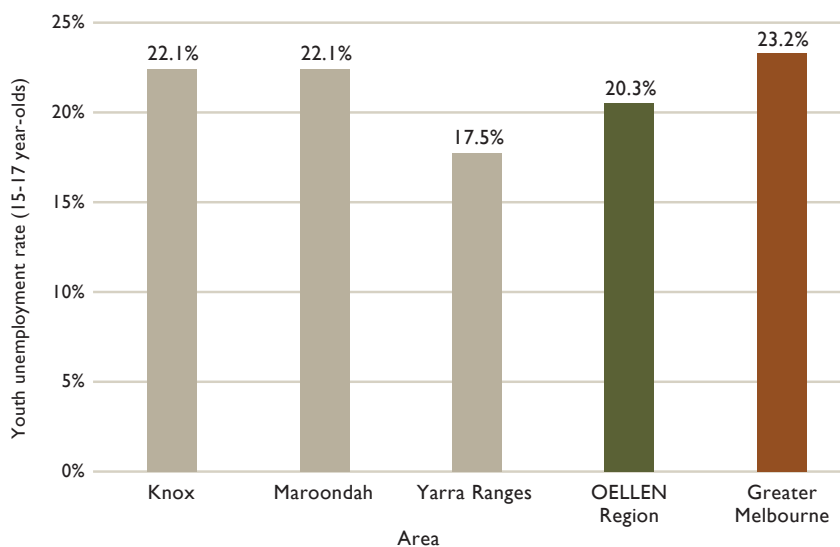
As detailed later in this DMP one of the challenges for tourism around Australia, and in the YVDR, is a shortage of skilled staff. There is a need to identify potential new sources of workers, one possible segment is older workers who have recently retired or are semi retired.

Of the 30 Victorian local government areas (LGAs) with more than 100,000 residents in the August 2021 Census, Yarra Ranges had the third highest share of total residents aged 55 to 75 years old at 23.5% just less than Mornington Peninsula (28%) and Bayside (25%). (Source: ABS Census 2021)

Between 2021 and 2031, the age structure forecasts for Australia indicate a 0.2% decrease in population under working age, a 29.7% increase in population of retirement age, and an 8.8% increase in population of working age

Source: <https://forecast.id.com.au/australia/population-age-structure>

Unemployment rate for young people in YVDR



Youth employment rate (15-17 year olds) across the OELLEN region, 2021

Source – Outer Eastern Local Learning and Employment Network: Environmental Scan 2022 Report

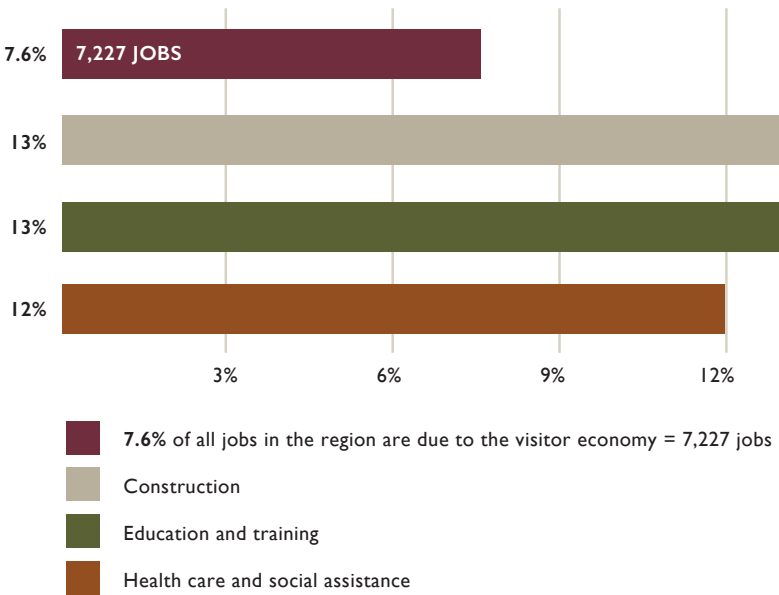
Additionally, the unemployment rate for young people in the Yarra Ranges and OELLEN region is less than for Greater

Melbourne, meaning there is less young people currently available to working in the industry.”



Visitor economy jobs due to direct impact of visitor spending (pre COVID-19)

Source: ABS 2021 and ODIN360 estimates – See Glossary for a definition of Visitor Economy Jobs



IMPACT OF COVID ON THE REGIONAL VISITOR ECONOMY

The YVDR visitor economy was one of the regions most heavily impacted. Total annual visitor spend went from \$941m in pre covid to \$431m in the 2020-21 period. Employment in the visitor economy in the region was also impacted heavily with jobs directly due to tourism spending reaching 7,227 pre-COVID-19 and falling to 4,236 in 2020-21.

One of the reasons YVDR was impacted more than other regions was because it was caught up in the greater Melbourne lockdowns. It was therefore not eligible for much of the visitor economy recovery funding that was made available to broader regional Victoria. As a consequence, for a period YVDR was the most impacted region in Australia outside of the capital cities. This means that there is a significant amount of work to recover to pre covid levels, let alone to recover in a sustainable way. The economic situation

ANNUAL REGIONAL TOURIST SPEND



post COVID with higher interest rates and inflation will encourage more day trip visitation which is one of the challenges that this DMP is seeking to address.

Therefore, the implementation of this DMP should be given significant priority to help overcome the disadvantages that YVDR has endured.

Local Area Plan stats:

The YVDR region is a diverse area with four local areas having been identified as part of the development of this DMP. (See page 33). These areas have quite varied reliance on the visitor economy.

The most visitor economy-dependent local area is Upper Yarra Valley followed by Yarra Valley and then the more diverse economies of Dandenong Ranges and Western Yarra Valley:



WESTERN YARRA VALLEY

received **8%** of YVDR region visitor spending but has above-average reliance on interstate visitor nights and below-average reliance on intrastate visitor nights.



YARRA VALLEY

received **34%** of YVDR region visitor spending and has near average contributions from the four types of visitation, though with lower reliance on international visitor nights.



UPPER YARRA VALLEY

received **16%** of YVDR region visitor spending but has above-average reliance on intrastate visitor nights and domestic day trips, and a lower reliance on international visitor nights and interstate visitor nights.



DANDENONG RANGES

received **39%** of YVDR region visitor spending but has above-average reliance on international visitor nights and below-average reliance on intrastate visitor nights.



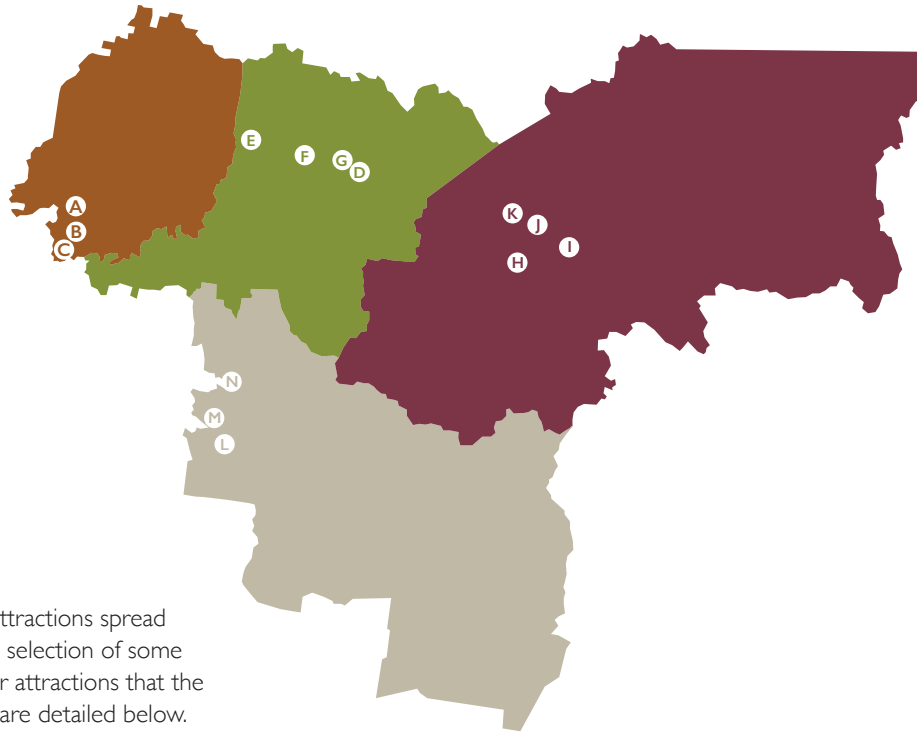
SECTION 2: REGIONAL OVERVIEW

Item	Western Yarra Valley	Yarra Valley	Upper Yarra Valley	Dandenong Ranges	Balance
Population <small>(source ABS 2021)</small>	62,895 18%	63,457 18%	16,799 5%	160,161 46%	43,291 12%
Visitor Economy jobs due to direct impact of visitor spending <small>(source ODIN360 visitor economy industry estimates pre covid 2018-19 against ABS 2021)</small>	4.5% Construction - 13% Education and Training - 15% Health Care and social assistance - 14%	10.5% Construction -12% Education and Training -9% Health Care and Social Assistance -12%	30% Construction -13% Education and Training -16% Health Care and Social Assistance -13%	8.7% Construction 13% Education and Training - 16% Health Care and Social Assistance - 11%	1.2% Construction 17% Education and Training - 8% Health Care and Social Assistance - 11%
Share of Visitor spending per annum <small>(source ODIN360 estimate and TRA Data 2019)</small>	8%	34%	16%	39%	2%
Primary contributors to total spend in the region <small>(source ODIN360 estimate and TRA Data 2019)</small>	Domestic Daytrip = 39% Intrastate Visitor Nights = 30%	Domestic Daytrip = 44% Intrastate Visitor Nights = 36%	Domestic Daytrip = 47% Intrastate Visitor Nights = 42%	Domestic Daytrip = 40% Intrastate Visitor Nights = 28% International Visitor Nights = 24%	Intrastate Visitor Nights = 51% Domestic Day trip = 27%
Holiday Domestic Visitor Nights <small>(source TRA Data 5 year average to March 2020)</small>	32k Share of YVDR region = 7%	222k Share of YVDR region = 45%	54k Share of YVDR region = 31%	79k Share of YVDR region = 16%	
International Visitor Nights <small>(source TRA Data 2019)</small>	129,340	147,839	52,216	637,529	47,128
Holiday Domestic Day trips <small>(source TRA Data 5 year average to Mach 2020)</small>	83k Share of YVDR region = 3%	890k Share of YVDR region = 37%	528k Share of YVDR region = 22%	716k Share of YVDR region = 30%	

2c. Major attractions

This YVDR is blessed with many wonderful attractions and experiences. Set out below is a small snapshot of some of the higher profile attractions. A complete list would be impractical as it would account for hundreds of individual experiences. It is clearly recognised that each of these Local Areas have their own unique and exciting activities.

Food and drink, including world class wineries and distilleries, breweries and cider houses as well as nature and rail trails, the Yarra River, parks and gardens, arts and culture and wellness and hero experiences are spread across the region and local areas.



In addition to the attractions spread across the region, a selection of some other current major attractions that the region has to offer are detailed below.



WESTERN YARRA VALLEY

- A** Edendale Community Environment Farm
- B** Montsalvat
- C** Diamond Valley Railway inc.



YARRA VALLEY

- D** Healesville Sanctuary
- E** Yarra Valley Chocolaterie & Ice Creamery
- F** TarraWarra Museum of Art
- G** Four Pillars Gin Distillery



UPPER YARRA VALLEY

- H** Warburton Mountain Bike Trail Head
- I** Cement Creek Redwood Forest
- J** Warburton Rainforest Gallery
- K** Mount Donna Buang



DANDENONG RANGES

- L** Puffing Billy Railway
- M** 1000 Steps/Mount Dandenong Tourist Rd
- N** Skyhigh Mount Dandenong

2d. New and planned infrastructure

Work is underway to develop new, and enhance existing, tourist attractions – from natural and activity-based attractions, to food, dining and accommodation – across the YVDR region. This development activity will be funded by private investment as well as local, state and federal government grants.

This investment will revitalise, reinvigorate and better support tourism in the region now and enable it to grow in the future. As such, this DMP and LAPs have captured and identified a number of key projects to leverage this investment.

Set out below is a sample of the significant new and planned infrastructure.



CYCLING AND TRAILS

Timeframe

- S** Short term 0-3 years
- M** Medium term 4-7 years
- L** Long term 8-10 years

YARRA VALLEY TRAIL

Yarra Valley to Upper Yarra Valley

\$16.75M

TIMEFRAME: S to L

Delivered over multiple stages, this project will create a valley-wide loop by connecting Lilydale with Yarra Glen and Healesville, and then to the Lilydale to Warburton Rail Trail. The trail will deliver improved safety and accessibility to provide an outstanding opportunity for locals and visitors to walk, cycle, run or horse ride along the trail, while experiencing the natural surrounding beauty of the valley and river and local produce destinations along the way.

WARBURTON MOUNTAIN BIKE DESTINATION

Upper Yarra Valley

\$11.3M

TIMEFRAME: S to M

Featuring 44 trails covering 186km, this destination is proposed to be the only Gold-Level Mountain Bike (MTB) centre in Australia – and only one of three outside the USA. Trails will run across parts of Mt Little Joe and Mt Tugwell and also connect to the Lilydale-Warburton Rail Trail and O’Shannassy Aqueduct. With future signature trails still to be approved, this destination is expected to attract about 128,000 new visitors, generate 77,000 overnight stays and offer huge potential to revitalise Warburton. Such as the Wesburn pump track which will be one of Victoria’s leading facilities of its kind.





ATTRACTIONS AND FACILITIES

RAPTOR REHABILITATION CENTRE AT HEALESVILLE SANCTUARY

Yarra Valley

\$3.72M

TIMEFRAME: S

A key new drawcard for Zoos Victoria members and visitors, the rehabilitation centre will allow injured birds to rebuild their strength and stamina to take flight into the wild again. The aviary will be attached to the sanctuary's wildlife veterinary hospital and a 30m x 25m flight training area will minimise staff handling and allow birds uninterrupted flight.

LILYDALE PINE HILL CARAVAN PARK

Yarra Valley

\$525,000

TIMEFRAME: S

The project will involve the construction of 14 new accommodation cabins, including disability and pet friendly cabins, and the construction of a state-of-the-art amenities block. A mountain bike wash and lockable storage plus a pet wash facility are included in the Project.

LINKING THE VALLEY: THE RECONSTRUCTION PROJECT (YARRA VALLEY RAILWAY)

Yarra Valley

\$8.25M

TIMEFRAME: M

With more than 500 volunteers at work, this is one of the largest community-based projects run by volunteers in Australia and sure to strike a chord with rail and history enthusiasts. The vision is the restoration and operation of heritage rail services between Yarra Glen and Healesville. Work is underway between Yarra Glen and TarraWarra Estate, with recent achievements including the full restoration of the Yarra Glen Station building and all structural works on 16 bridges.

REDWOOD FOREST AND CEMENT ROAD BRIDGE UPGRADE

Upper Yarra Valley

\$4.2M

TIMEFRAME: S

The stunning Redwood Forest has become increasingly popular. Investment in the area through more carparking, accessible public toilets, a wet-weather visitor shelter and appropriate viewing and walking paths will help support increasing visitor numbers while protecting this unique site from visitor impacts. Enhancements will also include a formal 3.8km trail network and fencing and vegetation support to further help maintain the wonder of this magical site. Also, the Cement Road Bridge that leads to the Redwood Forest is being upgraded.

THE CHELSEA AUSTRALIAN GARDEN, OLINDA

Dandenong Ranges

\$6.4M

TIMEFRAME: S – Opened

This exciting new garden is a re-creation of the Gold Medal Chelsea Garden by Phillip Johnson and Wes Flemming in the Olinda Golf Course site. It opened in mid 2023. The garden itself is more than 20 times the size of the original award winning garden and showcases more than 15,000 plants.



NGURRAK BARRING | RIDGEWALK MT DANDENONG

Dandenong Ranges to Yarra Valley

\$9.6M

TIMEFRAME: S

Work to build 14km of new trails to connect with 39km of existing trails across the Dandenong Ranges is underway. The project will showcase the histories and culture of the region and offers a contemporary exploration of art, landscape and indigenous ways of knowing.



BUSINESS CASES AND MASTERPLANS

LIGHT UP NATURE INTO ART (LUNA)

Yarra Valley

\$250K

TIMEFRAME: COMPLETED

A detailed business case demonstrated a nighttime light-up attraction would be viable at Maroondah Reservoir Park. Acknowledging its magnificent features for experiential activations, its location and capacity. However, the current condition is not suitable to accommodate visitation at night. A Masterplan for the site (\$150k) is now required to guide the necessary upgrades and further budget bids and should be led jointly by Melbourne Water, Parks Victoria and Yarra Ranges Tourism.

GULF STATION MASTERPLAN

Yarra Valley

\$80K

TIMEFRAME: S

A masterplan will be created for the future development of the Gulf Station historical farm. Located on the Melba Highway at Yarra Glen, the Gulf Station was a working farm in the region that supported gold miners of the district with local produce from the 1850s to 1950s and is now owned by the National Trust.

BIG4 YARRA VALLEY DREAMING MASTERPLAN

Yarra Valley

\$207K

TIMEFRAME: S

The project will develop a masterplan for a holiday park inclusive of an aquatic centre, an indoor play facility, mountain bike and walking trails, beautiful and unique accommodation options, working with First Nations People to inform and educate guests on history, culture and language of the local Wurundjeri people.

YARRA VALLEY EQUESTRIAN PARK

Yarra Valley

\$250K

TIMEFRAME: S

The Yarra Valley Equestrian Park has completed creating feasibility studies, town planning assessments, and detailed designs. The project includes state-of-the-art arenas, function facilities and overnight accommodation for horses and riders. The proposed plan seeks to offer over 90 equestrian events a year, and its feasibility studies indicate that Equestrian Park will provide the region \$8.3M per year in economic contribution and 43 full-time jobs per year once fully operational. The organisation is currently seeking Government support and has raised \$1.25M in local community pledges to fund Stage 1, which has Planning approval, at an estimated project cost of \$3.5M.



RESTAURANTS AND CONFERENCE FACILITIES

HELEN & JOEY ESTATE

Yarra Valley

\$20M

TIMEFRAME: S

With significant State Government support through the Regional Tourism Investment fund of \$3.5m, construction is nearing completion on this project that will deliver a 16-room boutique accommodation facility, a 110 seat restaurant and event and conference spaces. The design encompasses inviting landscapes and an outlook that maximises the Spring Lane natural surrounds and aims to attract 40,000 international visitors each year.



YARRA VALLEY GOURMET FOODS UPGRADE

Yarra Valley

\$725K

TIMEFRAME: S

With significant government support, a new alfresco outdoor deck and art workspace and gallery, as well as an expanded factory production space, accessible walkways and new car parks, this project will be a drawcard for foodies and art lovers.

TARRAWARRA – THE EVA AND MARC BESEN CENTRE

\$ Significant

TIMEFRAME: S

An inspiring new space for learning and engagement, delivering an additional element to the existing gallery, winery and restaurant.

ACCOMMODATION

The ability to accommodate overnight visitors and workers servicing the area is critical to the region's future. The following accommodation developments have been identified through the consultation phase; however this should not be viewed as an exhaustive list as there may be more applications submitted or confidential developments underway. Some of these projects are yet to proceed to formal application.

All of the following accommodation will add to the stock in the region. Project timeframes for a number of these developments are yet to be finalised. Subject to planning and costs issues, the majority of these developments will be undertaken in the next 10 years.

SITE	ACCOMMODATION TYPE	ROOM NUMBERS PROPOSED
Cedar Mill Redevelopment * Yarra Valley	Hotel Boutique Villas	300 room 20 boutique villas
Levantine Hill Estate Yarra Valley	Boutique accommodation	34 rooms
St Huberts Cellar Door Yarra Valley	Hotel	80 rooms
Burnham Beeches Dandenong Ranges	Hotel Glamping	48 rooms 82 glamping sites
Helen & Joey Estate Yarra Valley	Boutique accommodation	16 rooms
BIG4 Yarra Valley Yarra Valley	Cabins	40+ cabins and water park facility
RACV Yarra Valley	Hotel	40 rooms
Pinehill Caravan Park Yarra Valley	Sites and Cabins including Mountain Bike facilities	14 cabins and amenities
Sanitarium Factory Upper Yarra Valley	Spa Retreat	Plan currently on hold but over 150 rooms
Warburton Chalet (Scotchmans Creek Rd, Warburton) Upper Yarra Valley	Accommodation, restaurant & recreational facilities	Maximum of 180 rooms Maximum of 20 cabins (no larger than 80 square metres) Conference and related facilities capable of handling up to 500 people at one time
Lake Muratore (1350 Little Yarra Road, Gilderoy) Upper Yarra Valley	House & cabins	20 cabins (maximum of 10 to be 2-bedroom, the rest 1-bedroom) 100-site camping and caravan park (maximum of 50 caravan sites) 30-unit motel complex 100-seat restaurant

*Only pre-approval with council – concept will need re-zoning and permit could be 12-18 months away

SECTION 2: REGIONAL OVERVIEW

SITE	ACCOMMODATION TYPE	ROOM NUMBERS PROPOSED
11 Maroondah Hwy, 16 Airlie Rd, & 15 Healesville Kooweerup Rd & Maroondah Highway, Healesville ** Yarra Valley	Guest house	32 rooms
Marybrooke Manor / Baron of Beef (10 Sherbrooke Road, Sherbrooke) Dandenong Ranges	Accommodation, restaurant & function centre	Maximum of 14 rooms Maximum of 240 restaurant seats
Balgownie Estate (1309 Melba Hwy, Yarra Glen) Yarra Valley	Accommodation, restaurant & function centre	Maximum of 100 rooms Maximum of 150 restaurant seats 180 (maximum) person function centre
Kenloch (487 Mount Dandenong Tourist Rd, Olinda) Dandenong Ranges	Accommodation, restaurant & function centre	Maximum of 32 rooms

**Waste management issues being resolved

Based on the above pipeline of accommodation stock planned for the region, this represents over 1,000 rooms which will contribute significantly to meeting the projected demand for additional rooms required in the region.



INSURANCE

As part of its work to support the tourism industry, YRT engaged Deloitte in 2023 to undertake a review of the insurance challenges facing businesses in the region to gain adequate and affordable coverage. Which was motivated by the additional struggles facing the industry post the natural disaster of the June 2021 Storms.

Insurance is an operating/licensing requirement, and for many businesses insurance is an important risk transfer mechanism to assist in their financial

management. These businesses rely on several coverages, with property and public liability particularly notable.

Concerning trends show that several insurance companies have ceased offering coverage to the YVDR, and those that do offer cover have significantly increased premiums and/or included substantial restrictions on coverage such as exclusions, caps and limits. These changes leading to insurance becoming a material operating

cost for business, putting pressure on sustainability of businesses. In particular, businesses cite insurance is around 12% of operating expenses, a three-fold increase from 4% five years ago. From these increasing costs, some businesses have sold to larger operations and some have ceased business altogether.

Insurance stakeholders noted several contributors to the decrease in insurance accessibility as depicted in the following diagram.

Drivers of Insurance Inaccessibility



The research and analysis highlighted several possible strategies available to help mitigate the risk characteristics and potentially lower premiums or reduce policy limitations. In addition, consideration of different insurance/ risk design options is vitally important. However, both these strategies and insurance options require stakeholder consultation, government involvement and further analysis and consideration to develop and implement effectively. This problem is urgent, and the only viable short-term solution that we can see involves Victorian Managed Insurance Authority (VMIA) participation in providing the required coverage until a longer-term solution is put in place. For this to be viable for the VMIA, it will require local tourism operators across

Victoria to pool together to form a single entity for insurance purposes.

Longer-term strategies to investigate include:

- Land management – including controlled burning, clearing, fire breaks.
- Infrastructure and expertise - improving road accessibility and access to water and considering availability, capacity, location and travel time of people with specialist skills and equipment.
- Transparency and documentation of risk characteristics - to ensure risk characteristics are understood and businesses are aware of obligations and how to mitigate risks.

The other major stakeholders include the Insurance Council of Australia ("ICA"), is also 'buying-into' this pressing issue, announcing measures intended to improve the affordability and availability of commercial insurance products for small medium enterprises (SMEs). The ICA's involvement will be useful to include in the supplementary phase. There have also been positive examples of collective risk mitigation and premium reduction by the Caravan Industry of Australia, Australian Live Music Business Council and Outdoors VIC & NSW.





SECTION 3

**HOW WILL SUCCESS
BE MEASURED?**



3a. Major challenges facing the YVDR region

This DMP's success will depend on how well it addresses the underlying major challenges for the YVDR region. The major challenges are detailed below together with the objectives and key measures that seek to address those challenges. These measures will be used to assess the overall success of the DMP.

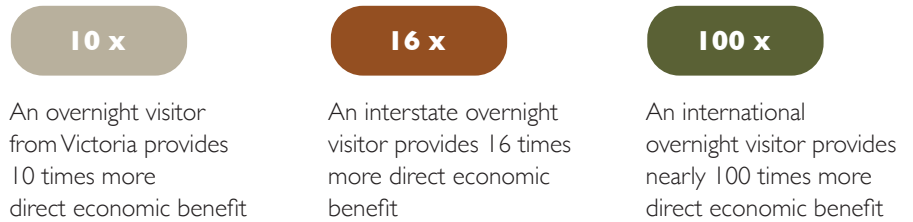
HIGHEST RATIO OF DAY TRIPS TO OVERNIGHT TRIPS OF ALL REGIONS OF VICTORIA



The Yarra Valley and Dandenong Ranges has the **highest ratio of day trips to overnight trips** of all regions of Victoria.

This is partly due to the combination of easy access from Melbourne, the lack of evening attractions and a related shortage of visitor accommodation. **For every overnight trip there are 10 day trips, which is the largest in the state.** This is expected to worsen as day trips to the region will double in the next 10 years from **4.5m to 9.1m** per annum.* This poses significant risks for the liveability of the region and the visitor experience if nothing is done to address this core challenge.

Overnight stays provide much better economic impact than day visits. For example:



*ODIN360 forecasts have been built using Tourism Research Australia National forecasts, and proprietary analysis techniques based on other industry data, population forecasts and economic indicators.

2 HIGH CONCENTRATION OF TRIPS ON THE WEEKEND



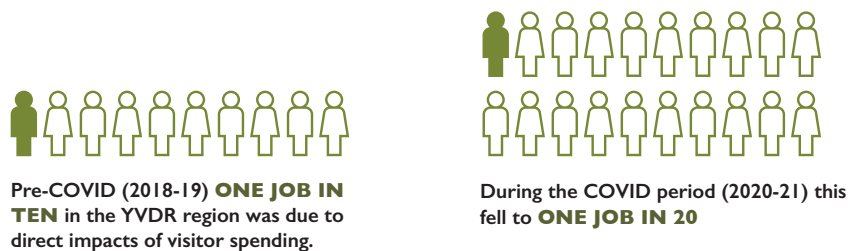
Related to the first challenge, the region has a high concentration of trips on the weekend compared to other regions of Victoria. These high ratios lead to greater challenges in justifying investment in tourism due to the lack of visitation across the week. This can be seen in limited accommodation options and volumes in the region as operators do not have confidence in returns with only a limited period of the week driving revenue.

Other challenges include finding staff, creating a night-time economy and opening throughout the week. This concentration of visitation can cause overcrowding and other issues that impact the local community and affect the liveability of the region. This may impact the level of community support for tourism, compared to a more even spread of visitation across the week.

3 SKILLS AND LABOR SHORTAGES



In addition to the two long-term challenges, the COVID-19 period left a hangover of skills and labour shortages. Many staff left the tourism industry for other sectors and international backpackers and students are only slowly returning to Australia and struggling to find affordable accommodation in the YVDR region.



3b. Our Core Challenge

A business-as-usual approach to tourism in the region will see the current social license for tourism erode rapidly. This will be due to the forecasted increase in day trip visitation, particularly on weekends. This rise in day trip visitation will be mainly due to improved access to the region from Melbourne and significant adjacent population growth.

If nothing changes the region will see increased day trip visitation move from **4.5m to 9.1m visitors per year over the next 10 years**. This will significantly impact liveability and the social license for tourism.

The challenge of higher day trip visitation impacts this region much more significantly than other tourism destinations across the state. If not addressed, it will threaten the 11,500 jobs and the \$2.3 billion attributed to visitor spending by 2033.



Therefore the purpose of the DMP must be:

To enhance the liveability of the region, lift social license for tourism and grow the visitor economy in a sustainable manner.



3c. DMP objectives

In order to affect change in the region over the next 10 years and address the core challenges facing the YVDR region, the following four key objectives have been set for the DMP.

Key performance objectives are outlined for the delivery of the DMP over the next 10 years. Each year of the DMP, an annual DMP Implementation Plan will be required to be submitted to the Victorian Government in line with the requirements outlined in the Victorian Visitor Economy Masterplan requirements. This will include progress in relation to short term, medium term and long term measures.

To ensure the impact of the DMP can be measured over the next 10 years, YRT will use the following data sources.

The DMP objectives are to:

1

Drive regional economic benefit by changed visitor travel behaviour



(a) – Increase regional economic benefit

Total YVDR region real visitor spending is forecast by ODIN360 to grow from \$1.21 billion in 2022 to \$2.33 billion in 2032 (2022 \$s) (in the absence of DMP initiatives). The stretch target with full DMP implementation is to increase this figure to \$2.75 billion or an increase of \$421 million or 18% compared to the business-as-usual forecast.

Sources: TRA National Visitor Survey and International Visitor Survey, TRA regional tourism satellite account

(b) – Shift day trip to overnight visitation

- i. The ratio of day trip visitors to total overnight visitors is forecast to grow from 5.8 in 2022 to 6.4 in 2032 (in the absence of DMP initiatives). The DMP aims to reduce this ratio with the stretch target of 4.1 in 2032.
- ii. The share of total tourism spending in 2032 without DMP initiatives is forecast to be 53% day trip and 47% overnight – the DMP initiatives aim to shift this ratio in 2032 to a stretch target of 41% day trip and 59% overnight.

Sources: TRA National Visitor Survey and International Visitor Survey

2

Improve the visitor experience



Net promoter score (NPS) and Guest Review Index from online reviews for key attractions in the region (eg ReviewPro) were identified through the situational analysis undertaken for this DMP. This showed an NPS score of 21 from a representative sample of visitors to the region. However, an NPS or central monitoring of ratings and reviews is not currently captured by the region. Decisions will need to be made on how best to monitor the visitor experience throughout this DMP and baseline figures recorded. Reporting against these figures will need to be aligned with available resources or through partnerships with industry that may be capturing these scores currently. YRT and stakeholders will need to determine how best to monitor or survey and report against this metric. This will include defining benchmarks and target scores.

3

Improve liveability



Surveys were conducted during the situational analysis undertaken for this DMP to determine residents' views of liveability of the region. They showed 51% of local residents give a score of 9 or 10 for their level of satisfaction of living in the YVDR region. This was a one off survey and it's noted that central monitoring of liveability is not currently captured. YRT and stakeholders will need to determine how best to monitor or survey and report against this metric. This will include defining benchmarks and target scores.

Source: Annual Council Surveys or Bespoke YRT Surveys

4

Improve support for tourism in YVDR



Surveys were conducted during the situational analysis undertaken for this DMP to determine social license for tourism in the region. They showed 49% of local residents agreed or strongly agreed with the principle that tourism helps to make the YVDR region a better place to live, work and play. However, this was a one off survey and it's noted that central monitoring of liveability is not currently captured. Integration with Council's annual resident surveys or commissioning bespoke surveys may need to be considered as a primary indicator. YRT and stakeholders will need to determine how best to monitor or survey and report against this metric. This will include defining benchmarks and target scores.

Source: Annual Council Surveys or Bespoke YRT Surveys

CALCULATION OF ESTIMATED ECONOMIC BENEFITS OF FULL IMPLEMENTATION OF THE YVDR DMP

The ODIN360 forecast of a transfer of 10% of total day trips to two-night stays by 2032 with full implementation of the DMP carries more significant implications for YVDR. These implications include:

- reducing the ratio of domestic day trip visitors to overnight visitors to YVDR in 2032 from 6.4 to a more manageable 4.1 (or the same level as the Macedon region, which is the second highest of the 20 Victorian tourism regions in the chart for this ratio in 2019);
- building an estimated 1,450 new hotel/motel and similar establishment rooms by 2032 from the current estimate of 650, with this investment expected to be spread through the 10-year period and more weighted toward 2032. This would take the share of visitor nights in hotel/motel and similar establishments in YVDR from 12% in the eight years to 2022 to 16% by 2032;
- increasing the domestic and international visitor nights and visitor expenditure by at least 69% and 8%, respectively, in 2032 compared to the business-as-usual forecast; and
- increasing total visitor spending in YVDR in 2032 compared to the business-as-usual forecast by 18% or \$421 million. This reflects that the extra overnight visitor spending of \$545 million is much greater than the lower day trip spend, which reduces by \$124 million.



SECTION 4

SHARED VISION



4a. Developing a shared destination vision

Through the engagement process, the people of YVDR expressed their aspirations for the future of tourism in the region. The community’s combined feedback, alongside industry and visitor expectations, led to the following insights for a shared destination vision.

Key attributes for a shared vision included:

Nature on Melbourne’s doorstep:

A clean and green playground with unique flora and fauna.

Active and healthy lifestyle:

A destination that offers diverse outdoor activities – walk, run, hike, cycle, paddle, golf and snow – for active and healthy lifestyles.

Wellness:

A fresh air escape and personal restorative experience that leaves visitors refreshed and inspired.

Unique local experience:

More boutique destination, less mass tourism. Offers genuine engagement and hands-on experiences with the region’s community, including local makers, artists and creators.

Quality recommendation:

From food and drink, to nature and art – a place you tell your friends about.

Maintain a sense of discovery:

Slow experiences, rather than point to point transactions, to enhance the discovery of the region.

First Peoples:

Permeates and is woven into the experience.



Events worth travelling for:

Premier and well-run events that make journey worthwhile and don’t overcrowd with accommodation nearby.

Sustainability:

A core value within the region and attractor for visitors.

Tourism for all:

Locals to benefit from tourism through increased services and infrastructure to support tourism, more jobs and businesses, greater amenity and investment in services that supports residents as well as visitors.

Accessibility:

A region open to everybody to enjoy.



4b. The Yarra Valley and Dandenong Ranges destination vision

“Naturally *Impressive*”

The Yarra Valley and Dandenong Ranges is a diverse region that has a range of attributes that appeal to and are embraced by visitors and residents. However, the stand-out value across all the research and analysis is the region’s connection to nature including mountain ranges, rainforests and scenic drives.

Showcasing and preserving the Green Wedge and natural attributes

The large areas of natural environment across the YVDR (known as the Green Wedge area) and the region’s other natural attributes, are a key strength that should be protected to ensure future visitation and the ongoing liveability of the region.

Commonly referred to as the “Lungs of Melbourne”, or “Melbourne’s Playground”, the YVDR region offers a plethora of opportunities for people to undertake both active and passive natural

experiences. This connection to nature is represented in more than just the natural landscape and scenery.

From the First Peoples culture and stories and thriving arts scene, to local provenance of food and drink and farm gate experiences, many of the region’s popular key attractions have a strong connection to nature.

While the research has certainly identified that this Green Wedge aspect appeals to residents, businesses and visitors, it’s important to understand what the future holds and how changes to the Green Wedge could impact the region.

The Naturally Impressive vision was inspired by the region’s strong connection to nature. It reflects a desire to impress visitors with the region’s natural beauty and outstanding experiences and services that residents can also embrace and enjoy. It aspires to create a memorable destination that family and friends excitedly talk about as their next holiday destination.

The key market trends also indicate a growing attraction to wellness and the restorative sense of nature, with nature-based tourism and sustainability key factors for some leisure segments. The children of today (future visitors and residents) talk about “touching grass” after being immersed in the digital world.

It’s believed this desire to be close to nature will only grow stronger.



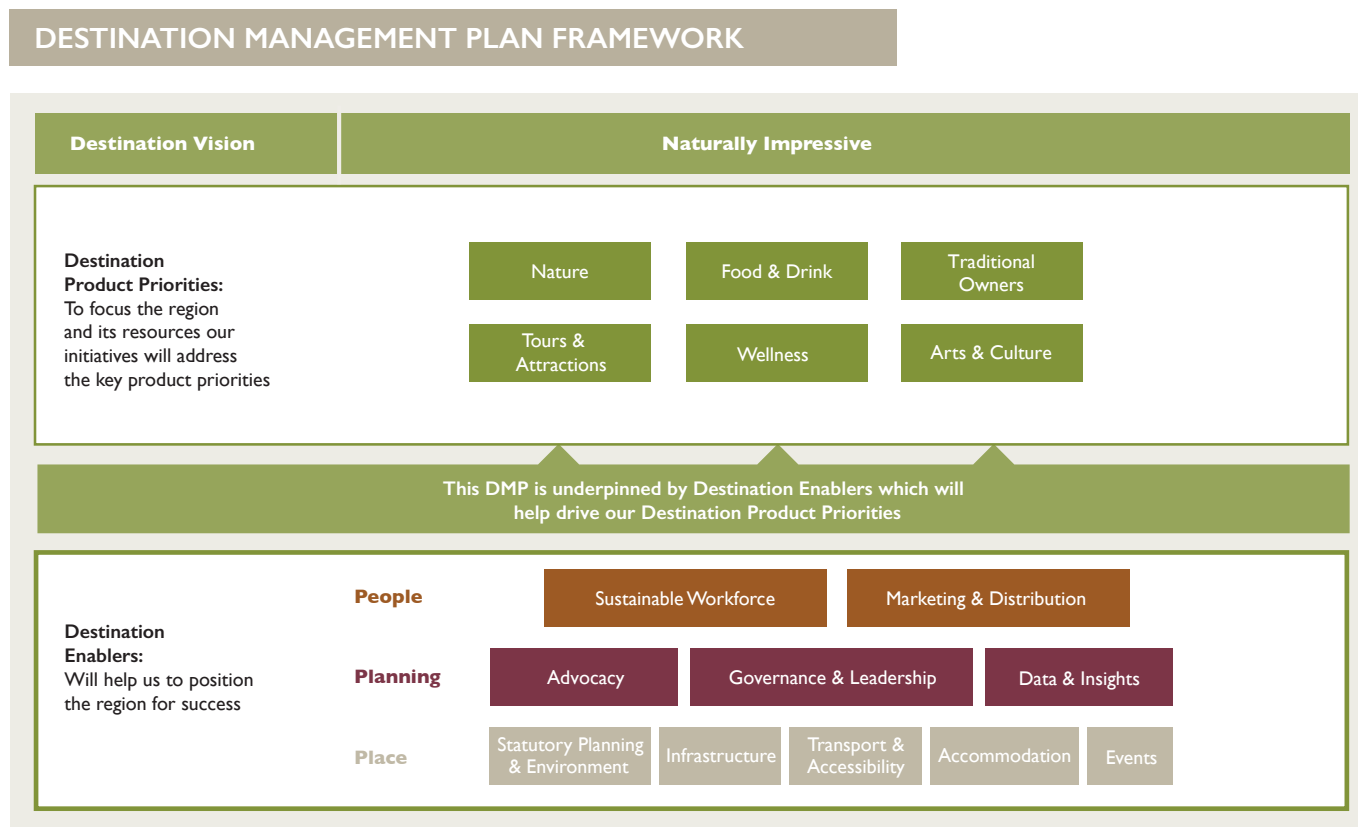
SECTION 5

DMP INITIATIVES



5a. DMP framework

The development of the DMP initiatives and actions to be delivered have been organised into a framework that identifies both Product Priorities and Enablers. Associated actions that need to occur for those Priorities to come to fruition are outlined later.



Local Area Differences

Whilst the above framework applies to the overall YVDR region, any individual strategic priority or additional initiatives may have more application in one Local Area Plan area than another.

An indicative overview of the importance of the key products is indicated below. Some products are more established in certain regions whilst others are relatively new and are emerging across the local area.

Local Area	Nature	Food and Drink	First Peoples	Tours and Attractions	Wellness	Arts and Culture
Western Yarra Valley Area	●	●	●			●
Yarra Valley Area	●	●	●	●	●	●
Upper Yarra Valley Area	●		●	●	●	
Dandenong Ranges	●	●	●	●	●	●

● Current Core Product ● Emerging Product

5b. Prioritisation of DMP Initiatives

Each DMP initiative has been placed into a priority matrix, which identifies those areas that need to be first addressed. There are eight strategic priorities that have been identified as having a game changing impact for the region if delivered successfully. In addition to these, and supporting the strategic priorities, there are other emerging regional priorities which will provide benefits to the region in the next 10 years.

These priorities are not stand alone and are heavily interdependent. For example, Accommodation is a key priority to meet increased visitor demand and shift day trip visitation. Yet this cannot occur

without a number of enabling initiatives being undertaken, in particular Statutory Planning & Environment, Data & Insights, Sustainable Workforce, Advocacy, Events and Transport & Accessibility. Similar principles apply when leveraging the new nature activities and other proposed product developments. This demonstrates that these priorities need to be undertaken in conjunction with each other and not in isolation.

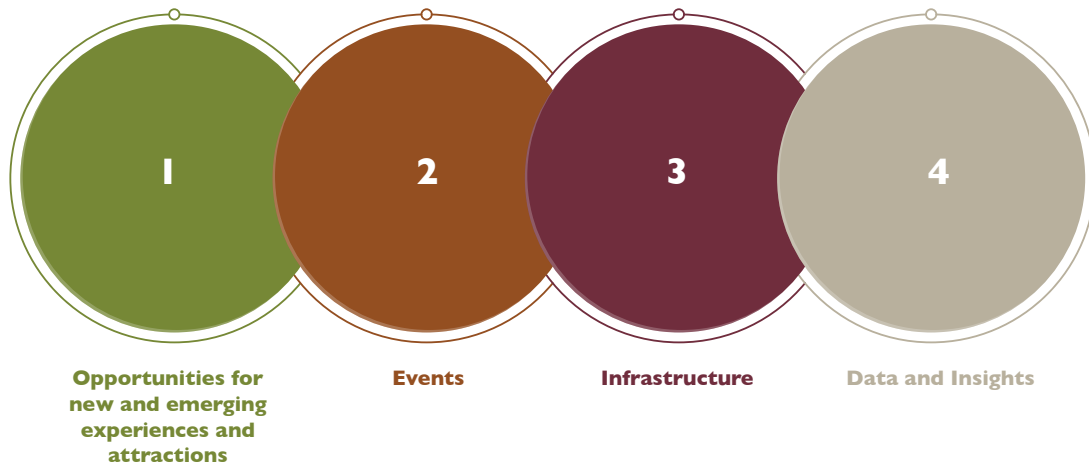
While the DMP identifies eight strategic priorities it does not mean that other priorities are not important, it is just that the impact of addressing these was not as significant as the eight strategic

priorities. However, it is imperative that they be addressed, particularly in the context of continuing to ensure that the current amenities and facilities at towns and parks across the region are fit for purpose.

Each section also includes an Action Plan and identifies the organisations responsible for the implementation of each key action, as well as the role of YRT in that process. The preferred time frame for each action is also noted – Short (0-3 years), Medium (4-7 years), Long (8-10 years).



Additional Regional Initiatives



5c. 8 Strategic Priorities



1.

Catalyst for Success: Developing a night-time and mid-week visitor economy

By developing a night-time and mid-week economy, the region will actively seek to shift visitation from weekend day trips to alternative times of the week. This is to reduce impacts on the community whilst also generating local support for tourism and more ongoing employment opportunities.



2.

Statutory Planning & Environment: Sustainable development for today and tomorrow

The current statutory planning framework is complex and heavily restrictive, particularly around the size of accommodation allowed and permitted land use. Whilst protecting the Green Wedge is paramount, the DMP seeks support for industry to gain the help it needs to navigate the planning system, as well as supporting LGAs to encourage appropriate State Government reform on key size limits and use. This is in order to progress sustainable and appropriate tourism development in the region, including infrastructure, facilities and accommodation.



3.

Accommodation: For visitors to enjoy and workers to call home

Both premium and affordable accommodation is in short supply across the YVDR. It is forecast that there is a need for more than 1,450 hotel/motel and similar establishment rooms over the next 10 years to service international and domestic visitors, particularly with the higher focus on generating overnight visitation to the YVDR.



4.

Transport & Accessibility: Easing congestion and better access for all

To ensure social license of tourism is protected, it is imperative that a transportation model be created that encourages transport other than private car travel to be used. This will require a new way of thinking for both the industry and the visitor. Given the integrated transport hubs at the key gateways around YVDR, there are opportunities to expand public transport services, ride-share opportunities and other more sustainable forms of travel.



5.

Developing and leveraging new attractions and experiences

As detailed in this DMP, a number of new pieces of significant infrastructure and products are currently planned or proposed across the YVDR. It is imperative that these be leveraged with clearly defined activation plans that maximise their benefit to the local region and meet the DMP's overall objectives. For example, targeting overnight visitors is much preferred to targeting day trippers. Investment and maintenance will also need to be constantly applied through the life of the infrastructure. Without that investment and maintenance, the benefits of the products will diminish over time and make them very costly to operate with decreasing benefit to justify it.

5A:

Nature: Leveraging world class nature-based experiences

Four world class nature-based public experiences are proposed to be built across the YVDR. Whilst some require additional funding support to complete, they are very clearly required in the region and advocacy through this DMP will play a key role in securing that funding. Leveraging the tourism benefits of this new infrastructure is paramount.

5B:

Food & Drink: Elevating the region's reputation

The YVDR is known for its world class wines and gins but less is known about its fantastic food and produce. A new premium food and drink festival that showcases local produce, along with a new food and drink Centre of Excellence and best practice agritourism experiences, will all help to highlight sustainable practices and local produce to elevate the region's reputation.

5C:

First Peoples Experiences: Embedding Traditional Owners values & experiences across tourism

As the Traditional Owners of the YVDR, it is imperative that the values reflect the ambitions of the three communities – Wurundjeri, Woi Wurrung Bunurung and Taungurung of the Kulin Nation – are embedded in and through the execution of the DMP. Continued dialogue and engagement with the Traditional Owners will be required to support the evolution of community led and culturally focussed visitor experiences.



6.

Leadership and Advocacy

One of the key findings throughout the consultation stage with industry was a perceived lack of clarity about the purpose and functions of the numerous organisations that play a role in leading, shaping and advocating for the YVDR visitor economy. This leads to confusion and perceived inefficiencies. Industry highlighted the need for more clarification of roles and objectives with potential consolidation.

6A:

Governance & Leadership: Delivering efficiently

The YVDR has many groups with interests in tourism and the visitor economy. The majority have very limited resources. The DMP presents a unique opportunity for the roles and responsibilities of these organisations to be clarified with the intention to more efficiently use these limited resources across the industry.

6B:

Advocacy: One Voice, One Message for sustainable tourism

There are many groups in the YVDR that play a role in the tourism ecosystem. To ensure the key advocacy requirements of the DMP are met, it will be imperative that the whole tourism industry in the YVDR speaks as a collective Voice with one consistent message.



7.

Marketing & Distribution: Changing visitor travel behaviour

To encourage the right target visitors to explore and discover all that the region has to offer, YRT will lead collective marketing that provides promotion, information and resources for visitors to the region to inform their travel decisions at all facets of their journey. From driving awareness and assisting with their holiday planning, to helping convert bookings and sales.



8.

Sustainable Workforce: Growing the region’s capabilities for the future

As the visitor economy grows so too will the need for a larger workforce. There’s an opportunity to secure a wider range of workers than has traditionally been employed in the industry, including securing workers from the many recent retirees in the YVDR.

Each of the above strategic priorities will have an impact on the overall DMP Objectives.

1	<p>Drive regional economic benefit by change visitor travel behaviour</p> <p>(a) – Increase regional economic benefit</p> <p>(b) – Shift day trip to overnight visitation</p>
2	<p>Improve the visitor experience</p>
3	<p>Improve liveability</p>
4	<p>Improve support for tourism in YVDR</p>



STRATEGIC PRIORITY I

Catalyst for success: Developing a night-time and mid-week visitor economy

VISION

The long-term aim is to raise the region's profile as an exciting and enjoyable destination to visit during the week and at night-time. Visitors will love exploring the region away from the weekend crowds, and businesses will embrace the opportunity to tailor their offerings. New attractions – including bespoke food and wine experiences, mid-week events and night-time sound and light shows – will delight visitors and be relished by locals. This new tourism dynamic will make the region more attractive to investors, open up more work opportunities for local people and improve liveability.

A key focus of this DMP is to develop the visitor economy to attract more people to visit mid-week and stay overnight. This is to reduce impacts on the community whilst also generating local support for tourism. There are many business events undertaken in YVDR. As some existing properties have conferencing facilities, there are opportunities to enhance the night-time and mid-week visitor economy which will help shift visitation away from the busy weekends and encourage more people to stay overnight, thereby increasing the value of the visitor spend. It could reasonably be expected that this would lead to more investment in the region due to increased visitor spend, more demand for overnight accommodation and increased visitation over the week. It will be a key catalyst to meet the DMP's objective of addressing the issue of very high – and rising – amounts of day trips and enhance the community's interest and support for tourism in the region.

Current status

YVDR has the highest ratio of day trips compared to overnight visitors in the state. The majority of day trips also occur on the weekend. A supply and demand cycle is perpetuating this issue.

For example, there are fewer visitors to the region at night because most visitor attractions are focussed on day-time activities. Most night-time attractions are usually on a Friday or Saturday night with many attractions, wineries and restaurants closed on a Monday and Tuesday. This dictates that people visit these places later in the week and on weekends.

The same issue applies to venues that only open at lunchtime. Visitors mainly visit YVDR during the day because there are limited options in the evening.

What the region needs

For this model to change, significant mind shifts are needed from both visitors and the local tourism industry. Night-time focussed tourism activities will need to be created across the whole week and marketing of these mid-week and night-time attractions will be needed to support these opportunities.

The benefits of this are:

1. Visitation will be across the entire week, helping to reduce congestion on weekends.
2. People attending night-time activities are more likely to stay overnight – generating higher visitor spend and a higher return on investment for accommodation providers. This will help support future business cases for additional investment in accommodation.

3. More night-time and mid-week activities will generate additional demand for restaurants and provide more stable and extra employment for tourism and hospitality workers. This is also likely to encourage more workers to join the industry and help fill the current gaps detailed in the Workforce Plan. (This also requires a shift in the way the State Tourism Organisation Visit Victoria markets regional Victoria, to target different demographics and promote behaviour change to visit mid-week).
4. The liveability of the region will be improved for residents.

How this will be achieved

The following seven strategic priorities and four additional initiatives provide the detailed actions that are key to shifting the visitor and tourism industry's mindset and providing meaningful attractions and experiences that spread visitor demand across the entire week and at night. The aim is to create an invigorated and vibrant visitor economy throughout the entire week.





STRATEGIC PRIORITY 2

Statutory Planning & Environment: Sustainable development for today and tomorrow

VISION

By recognising the importance of the Green Wedges to Melbourne in enhancing the liveability of the area and the visitor economy, a balance will be achieved between development growth and the sustainability of the region's natural attributes. The development of tourism infrastructure will be carried out in a way that maintains the core attributes of the Green Wedge and ensures its long-term protection.

Overview

The region's natural beauty is treasured by the local community and visitors, and there are good reasons for strict limits on developing significant infrastructure. However, future development is needed to manage the additional visitors. Without it, there is a higher risk of environmental impact. A balance needs to be struck.

State of play

Of all the issues that were raised through the consultation for this DMP, the complexity, impact, cost and time involved in the relevant statutory planning schemes in the YVDR was the most common.

One of the reasons for this is that much of the land within the YVDR region is zoned as a Green Wedge Zone (GWZ).

For good reasons, there are strict limitations on developing significant infrastructure in the GWZ. However, those restrictions can also prevent appropriately managed initiatives being implemented that actually benefit sustainability in the region.

The industry has made it clear that it fully supports and understands the need to protect the Green Wedge, but the planning rules make it extremely difficult to undertake projects that meet the guidelines.

Therefore, several Special Use Zones and other Commercial zones have been created in the region where more development is permitted. The industry needs clarity on how to best develop infrastructure and services

across each of these zones to support visitors to the YVDR.

Nillumbik Council recently updated its Green Wedge Management Plan in November 2019. The **Yarra Ranges Green Wedge Management Plan (GWMP)** was last updated in 2010 but it is understood that it will be updated soon. **Cardinia Shire Council** does not have a current GWMP and a plan is needed to guide the planning frameworks for tourism development in the region.

Both the Nillumbik and Yarra Ranges Council GWMP provide guidance on the role and importance of tourism in the YVDR, including the Green Wedge Zones.

Amended Planning Scheme for Yarra Ranges

In a recent amendment to the Yarra Ranges Planning Scheme (December 2022) a new section has been inserted which focuses on the role of tourism related activities on Green Wedge land. It provides some additional guidance on both strategy and implementation of the scheme. The objective of the Amendment is:

To provide for a variety of sustainable tourist oriented businesses that reinforce the primary values of the Yarra Ranges Green Wedge and contribute to the local economy.

YRC Strategies

I. Towns in Green Wedge areas

- a) *Encourage tourist related businesses such as visitor accommodation, restaurants, cafes and function centres to locate in established towns where they can help support local businesses*

and provide local employment.

- b) *Encourage the provision of backpacker style budget accommodation within or adjoining town centres that offer a range of accommodation services for guests and convenient access to areas of productive agriculture.*

2. Tourism in rural areas

- a) *Provide for tourist oriented businesses such as visitor accommodation, restaurants, cafes and function centres to locate on sites in productive agricultural areas or in rural landscape areas if they will operate in conjunction with either:*
 - *productive agriculture on the land or*
 - *the improved management of natural systems on the land.*
- b) *Discourage additional tourist oriented businesses in rural residential areas.*
- c) *Provide for on farm seasonal accommodation for people assisting with fruit picking and other agricultural work carried out on the land and nearby properties*
- d) *Discourage tourist oriented businesses on sites that are subject to significant environmental hazards.*

Nillumbik Planning Scheme

Section 17.04-1L of the Nillumbik Planning Scheme outlines the following key strategies in relation to tourism:

- *Facilitate the growth of tourism based on environmental and local interests, such as agritourism or eco-tourism.*
- *Encourage urban and rural-based tourism that can be accommodated by the environmental capacity of the Shire and the locality.*

- Facilitate tourism development opportunities that have minimal impact on the environment and build on the cultural and physical characteristics of the green wedge.
- Support tourism related use and development only where:
 - It is of a scale and type that can be adequately catered for by available infrastructure services.
 - It will not adversely impact on surrounding land uses.
- Encourage tourism related use and development in urban areas where:
 - There is safe and efficient access to main roads.
 - It respects the neighbourhood and streetscape character.
- Encourage tourism related use and development in rural areas where:
 - There is direct access from a major road.
 - It is compatible with the environmental and landscape values of the site and surrounding area.
 - Access is not reliant on local roads not suited to the traffic proposed to be generated by a use.

Statewide planning provisions and other zone options

While these strategies appear to encourage and support the concept of the tourism in the region, there are underlying issues with respect to some permitted uses and size and scale of tourism activity or accommodation.

These limitations are part of the State Planning system and Councils have no ability to unilaterally change the scale for any land.

And while a large part of the YVDR is GWZ, there are a number of other zones in the region that can provide more flexibility in respect to developing tourism related facilities.

In addition to GWZ, those zones include:

- Green Wedge A Zone
- Rural Conservation Zone
- Commercial 1 Activity Zones
- Commercial 2 Activity Zones
- Several Residential Zones
- Special Use Zones

Each of these zones have different rules and guidelines for tourism infrastructure. For example, the rules regarding accommodation for several of these zones are detailed below.

In addition to these various categories, there are a number of individual differences for how the areas are treated. For example, under State Government regulations:

- Under GMZ, group accommodation has a cap of 80 rooms and 40 dwellings but the minimum land size is 40 hectares.
- Under GWZA, group accommodation has a cap of 80 rooms and 40 dwellings but the minimum land size is 8 hectares.

Sitting under each of these areas are a series of rules and guidelines that impact the planning decisions, many of which are open to interpretation by both applicants, planners and council.

A similar framework applies for other tourism related uses, such as restaurants, food & drink, farm gate, arts & craft and recreation.

Summary of key challenges

As detailed above and as advised by the industry, a summary of the key challenges relating to this planning regime are as follows.

- **Complex planning framework** provides high level support for tourism across the region at a policy level but not as clear at a site level where future tourist accommodation will be supported.

- Lack of planning certainty adds risk and costs to what is already a lengthy planning process for applicants. Some key tourism development sites will require a land rezoning to facilitate the desired outcomes.
- Lack of strategic land use planning at a site level to identify suitable sites for visitor accommodation at varying scales.
- The region contains a diverse set of environmental conditions (landscape values, impacts of climate change, flooding and bushfire) and policy requirements that will constrain the ability of some sites to be developed for tourist accommodation or reduce the scale of developable land.
- **Green Wedge Zones** allow for tourist accommodation and infrastructure that is sensitive to the landscape and environmental context and qualities but there are some key limitations on tourism uses, including:
 - accommodation numbers (80 hotel rooms, 40 dwellings)
 - some land size requirements 40Ha and 8Ha (GWZA) and need to be in conjunction with agriculture, natural systems, outdoor recreation facility, rural industry or winery, and
 - function centre and restaurant – maximum 150 patrons across both.

Industry/landowners consistently raised the GWZ caps, with the changing economics of construction as a key barrier despite the zone permitting up to 40 dwellings and 80 rooms. The 150 patron cap across the function centre and restaurant was also challenging for some operators.



How the region will overcome these challenges

This DMP recommends key actions that will help the region overcome planning challenges so it can strike the right balance between protecting the Green Wedge and implementing sustainable development that supports tourism. These recommendations are as follows.

1. Undertake detailed strategic land use investigations to identify suitable land in relevant and appropriate locations to provide a 10-year supply of tourism accommodation. This would help meet the forecast need for 1,450 hotel/motel and similar establishment rooms.

This work could include to:

- investigate use of SUZ and other non GWZ zones for accommodation and tourism related activities
- investigate key winery and suitable farm sites for potential to introduce boutique and environmentally

sustainable farm stay or agritourism accommodation in the GWZ (group accommodation/host farm. Boutique Hotels up to 40 dwelling/80 room caps)

- identify 3-4 appropriate sites suitable for larger hotels in the region, and
 - identify towns and activity centres well suited for more focussed tourism infrastructure.
2. Based on the strategic land use investigations, detail the opportunity for wineries and farms to develop authentic host farm and agritourism experiences where visitors can stay and experience the daily operations of the winery/farm.
 3. Promote the opportunity for BnBs in the region – can accommodate up to 10 persons with appropriate car parking provision and don't require a permit (provided does not remove residential or workers housing stock).

4. Encourage joint advocacy within the region for planning reforms to State Government to review options for reducing red tape, providing greater planning certainty and potential priority assessment for key sites. Explore discretionary mechanisms at a local level to identify and support fast track permit and rezoning process for key sites.
5. Work with Councils to continue to facilitate concierge planning services due to the high cost of the planning process for business, timeliness and uncertainty in the current system..
6. Advocate for changes to the planning approach through a regenerative economic lens to facilitate appropriate business expansion, land use intensification and adaptive re-use. Push for planning reforms that allow more flexibility in discretionary patron and room caps in certain appropriate GWZ areas or a faster planning process in other sites suitable for larger developments.



Action items – product priorities

Timeframe




- S** Short term 0-3 years
- M** Medium term 4-7 years
- L** Long term 8-10 years

Statutory Planning and Environment

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Statutory Planning and Environment	1. Councils to jointly work together across the whole region to determine the best way of attracting the required investment in new accommodation for both visitors and industry workers. Eg, An investment prospectus that highlights locations with fewer encumbrances that can address the best outcomes for scale, suitability, expansion.			✓	Local Councils	S
	2. Continue the support of statutory planning concierge services for possible future tourism developments.			✓	Local Councils	S
	3. Review appropriateness of size caps on new rooms and seats for hotels and restaurants in the region.			✓	State Government, Local Councils	S
	4. Advocate to State Government to consider a regenerative economic approach to planning outcomes to facilitate more capable and viable tourism businesses on existing or identified sites/ zones to support visitation growth.			✓	Local Councils	M
	5. Work with property owners and investors through each Council's Planning and Business Concierge Service outlining planning pathway options, supporting where relevant property owners to develop master plans for larger developments.		✓		Local Councils	M
	6. Work with interested farms and/or wineries through the Planning and Business Concierge Service to support the planning permit application process for authentic host farm experiences where visitors can stay and experience the daily operations of the winery/farm.			✓	Local Councils	S
	7. Encourage Cardinia Shire Council to develop a Green Wedge Management plan that considers role of appropriate tourism activities in line with the planning scheme amendment passed by Yarra Ranges Council.			✓	Cardinia Shire Council	S

Sustainability impacts

GSTC criteria applied

-  **Section A: Sustainable management**
-  **Section B: Socio-economic sustainability**
-  **Section D: Environmentally sustainability**

UNSDG impacted







STRATEGIC PRIORITY 3

Accommodation: For visitors to enjoy and workers to call home

VISION

Increasing accommodation options in the region will encourage longer stays and attract visitors who will contribute to the region's economic growth and development. This includes identifying suitable sites for expanded visitor and worker accommodation options – small and large – and a potential accommodation investment prospectus. Coordinated advocacy to the state and local government authorities to streamline planning processes to overcome the challenge of limited accommodation options that have led to a preference for day trips over overnight stays.

Overview

Carefully planned accommodation that adds to the visitor experience and supports local workers will enhance tourism opportunities to the region for years to come. Tailored accommodation will also help temper the immediate – and growing – problem of disproportionately high numbers of visitor day trips to the region.

State of play

There is a significant shortage of accommodation in YVDR. This shortage will only increase over the next decade as the demand for visitation to the region grows.

It will further exacerbate the overwhelming day trip issue.

There are no large-scale hotels (over 100 rooms) in the region. Most are smaller boutique offerings (less than 25 rooms). There are some larger hotels located near the gateway to the YVDR, for example Ringwood and Doncaster, but they sit outside of the region in nearby suburbia. While the 100 room Peppers in Marysville is located beyond the Upper Yarra Valley. However, encouraging multi-trip and multi-stop itineraries will be a focus with these hotel operators. As identified in the visitor research, two of the top three reasons to make visitors stay longer would be night activities / sound and light shows (31%) and night-time exhibits (28%). The top reason – food and wine showcases (43%) – also lends itself to an overnight stay.

What the region needs

Approximately 1,450 new rooms required over the next 10 years

ODIN360 forecasting shows that approximately 1,450 hotel/motel and similar establishment rooms are likely to be required in the region over the next 10 years to help meet both current and future demand and support key product drivers. If the 1,000 rooms (approx.) earmarked (on page 41) for development earlier in this DMP are delivered, this means around 450 new rooms will be required over the next 10 years.

The accommodation need is very broad – both in terms of location and type.

How this will be achieved

A range of fit-for-purpose accommodation types will be developed.

Hotels

At present, there is no accommodation in the region that operates under an internationally recognised brand. This impacts the ability to market the region internationally. An international brand would enable more effective distribution to the international market and encourage those international (and interstate) visitors to stay in the region rather than just take a day trip. It will also provide a “measure of confidence and quality” for those unfamiliar with the other accommodation offerings.

While the highly regarded Six Senses

luxury brand has been proposed for Burnham Beeches in the Dandenong Ranges, it is smaller in scale than required across the entire region.

There remains a need for at least one major international branded hotel with both a business and a leisure focus to attract mid-week and weekend visitation.

A further benefit of larger hotels is that they become significant employers in the region and provide full and part time work opportunities and, in turn, support social license among the community.

Councils can play a key role to help investment by identifying preferred locations for this type of hotel within the structure and opportunities provided by the current planning schemes and zoning.

Other accommodation types can offer supply that is needed in the region

Caravan/holiday park

There is also a lack of caravan/holiday parks throughout the region. Whilst there are some larger scale parks, overall, the share of accommodation in caravan parks is much lower compared to other nature-based visitor regions (e.g., the Great Ocean Road).

A modern holiday park is much more than a place for caravan users and campers. They provide high-quality self-contained cabins (3.5 star and above) that are used by families and groups. They usually offer cheaper rates than an Airbnb

and in a location that has been approved for tourism accommodation. Holiday park accommodation can also be used by seasonal workers.

Again, council can help by identifying potential locations for new parks or encouraging investment in existing older style parks.

Other Accommodation – Farm Stay / Wineries etc

A number of wineries, farms and larger private allotments have the potential to provide much needed accommodation through cabins, glamping and small self-contained units. The opportunity exists in those environments to create a true immersive visitor experience that is

aligned to experiences in nature and are beyond simply providing a bed.

Accommodation access for all abilities

It's important to ensure that new accommodation provides a range of rooms and facilities to support access for all abilities.



Action items – product priorities

 **Accommodation**

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Accommodation	1. Investigate key sites that are in or adjacent to town centres or farm settings that are supported for sustainable tourism developments and meet the State government’s threshold levels for priority application support of \$20M.			✓	Local Councils, Industry	M
	2. Promote new tourism accommodation development in conjunction with the provision of worker accommodation (on-site or elsewhere in town).			✓	Local Councils	M
	3. Develop investment prospectus for accommodation based on identified sites by Council for visitors and for workers in the visitor economy. Include at least one 300 room international branded hotel which will help with profile and marketing to international tourists.		✓		Local Councils	M
	4. Build partnerships with accommodation operators adjacent to the region and create bespoke tours and offers to encourage mid-week visitation or mutli-stop itineraries.	✓			Industry	S

Sustainability impacts

GSTC criteria applied

-  **Section A:** Sustainable management
-  **Section B:** Socio-economic sustainability
-  **Section D:** Environmentally sustainability

UNSDG impacted





STRATEGIC PRIORITY 4

Transport & Accessibility: Easing congestion and better access for all

VISION

A sustainable transport strategy and system will enhance the distribution of visitors and address the limited network of transport within the region. Visitors will be able to more easily access and explore the region, while residents and workers will have improved mobility and transportation options.

Overview

The combination of tourism, including high volume day trips, and a lack of public transport infrastructure is creating congestion on local roads and in carparks, especially over weekends. With more people expected to live, visit and do business in the region in future, an integrated whole of region sustainable transport strategy that focusses on the tourism sector is critical to benefit locals and visitors alike.

State of play

One of the main concerns that came through the local community survey was congestion on the local roads and town parking, especially over the weekends. This was seen as an issue across all four local areas and tourism was perceived to be a key contributor. This is further exacerbated by the lack of public transport within the region, meaning car travel is the preferred or only form of transport.

Part of the congestion is caused by the nature of the roads being largely regional roads, often in Green Wedge locations. This limits options for widening roads or adding new lanes across the regions, or even improving safety through the removal of vegetation along roadsides.

This congestion will only get worse in line with projections of 9 million day trips by 2032 (see page 4).

Transport to the region is well served by rail to Belgrave, Lilydale and Hurstbridge, but as noted, public transport within the region to the towns, villages and tourism attractions is minimal, particularly at night and weekends. There is an existing "hop

on hop off" operator called Hop It that provides services through the Yarra Valley region, and the Warburton Adventure Company serves the Warburton region and surrounds. These services are helping to address the limited supply of transport services for visitors and locals, but further investment would be needed to meet the expected demand over the next 10 years.

At present, to visit the wineries and the tourist attractions in the YVDR there are few options other than through private car or private tours.

What the region needs

A whole of region integrated transport plan that can shift 20% of visitors to use public transport and "hop on hop off" buses instead of private cars needs to be developed. This target is in line with Yarra Ranges Council Connected Transport Strategy. Against the projected 9 million days trips alone in 2032, such a strategy would lead to a significant reduction in people moving through the region in cars, providing some relief to congestion and parking issues.

How this will be achieved

There is strong industry support for the continued implementation of a sustainable transport plan that ensures smooth and easy distribution of visitors across the YVDR region.

While individual Councils have their own transport plans, an integrated regional approach will be more effective, particularly from an advocacy viewpoint.



They key elements of the plan would consider:

- Developing transport hubs with all day parking options on the outskirts of the YVDR, connected (where possible) to the train stations or transport interchanges
- Connecting the transport hubs to the rail stations to encourage less vehicles driving to the YVDR as well as within the region
- Operating a hop on hop off public transport or private bus system from those transport hubs that take visitors to key visitor sites around the region
- Undertaking a campaign to increase the number of Taxis and Uber drivers based in the region (linked back to the workforce plan)
- Supporting Councils to advocate for improvements to existing public transport services and local bus routes across the region that will better service locals, visitors and workers, especially in evenings and on weekends
- Offering paid parking for visitors in key locations across YVDR with higher rates on weekends
- Creating a destination pass for mid-week and night-time with discounted transport if a hop on hop off service is created or linking ticket entry to key attractions to include public transport

- Encouraging the development of cycle and walking routes, which are also suitable for e-bikes, between tourism attractions
- Ensuring installation of sufficient EV charging stations for expected growing use of electric vehicles
- Developing new options to manage traffic and bottlenecks in Main St Lilydale, Olinda, Sassafras and Healesville.

Action items – product priorities

Transport & Accessibility

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Transport & Accessibility	1. Build on the findings of the Integrated Transport Strategy developed by YRC to incorporate the principles and service needs for the whole tourism region to inform future advocacy, business cases, pilot schemes and/or changes to service by State Government and private sector.			✓	Local Councils	S
	2. Investigate opportunities for destination pass to include mid-week and night-time discounted transport and parking options.			✓	Local Councils, Transport Providers	S
	3. Assess the viability of updated parking regulations to favour locals.			✓	Local Councils	S
	4. Encourage the use of existing and encourage the development of new cycle/walk routes between attractions on public and private land.		✓		Local Councils	S
	5. Provide and advocate for the installation of sufficient charging stations for expected growth of use of electric vehicles.			✓	Local Councils, Vic Roads	L
	6. Undertake campaign to encourage ride share and taxi services to the region.			✓	Local Councils	S

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability



Section D: Environmentally sustainability

UNSDG impacted





STRATEGIC PRIORITY 5

Developing and leveraging new attractions and experiences

As detailed in this YVDR DMP, several new pieces of significant infrastructure and products are currently planned or proposed across the YVDR. It is imperative that these be leveraged with clearly defined activation plans that maximise their benefit to the local region and meet the overall objectives of the DMP. For example, targeting overnight visitors is much preferred to

day trippers. Investment and maintenance will also need to be constantly applied through the life of any new, and existing infrastructure to ensure sustainability and climate-resilience. Without that investment and maintenance the benefits of the products will diminish over time.

STRATEGIC PRIORITY 5A

Nature: Leveraging world class nature-based experiences

VISION

The vision is to harness the tremendous potential of the region’s natural beauty and features. There’s an aspiration to protect and preserve unique sites through sustainable accessibility and infrastructure development. The focus is to raise awareness of these precious assets and their importance to the community. By promoting responsible tourism, the aim is to strike a balance between development and preservation to ensure that the region’s natural surroundings continue to be enjoyed by future generations. The goal is to create a vibrant, thriving economy that supports the community and visitors alike, while maintaining the region’s natural beauty.

Overview

The region’s nature-based attractions are cherished by the community and are a major visitor drawcard. There is no shortage of experiences that encompass the natural beauty of the region. Ongoing investment in maintenance and development of existing sites and new attractions – is vital to grow tourism, and to ensure attractions are protected and preserved for future generations.

State of play

There are exciting plans for investment in four world class pieces of nature-based tourism infrastructure in the short to medium term. They are:

1. Yarra Valley Trail from Lilydale to Healesville and linking back to the Lilydale to Warburton Rail Trail near Woori Yallock – part of the Ridges and Rivers Project

2. Ngurrak barring | RidgeWalk – part of the Ridges and Rivers Project
3. Warburton Mountain Bike Destination – part of the Ridges and Rivers Project
4. Diamond Creek Trail extension

Each project is unique and will appeal to a wide range of visitors. They also provide a fantastic opportunity for the YVDR to reinforce its credentials as a leader in Australian nature-based tourism.

The Chelsea Australian Garden at Olinda is now completed the other projects are all in detailed planning stage. Some are not fully funded or approved, for example the Warburton Mountain Bike Destination. Throughout industry consultation these attractions were highlighted as future iconic and important nature-based activities and experiences for the region. A key aspect of the DMP will be the combined advocacy of the region to seek and support the final funding required to ensure delivery in a reasonable time frame.



However, there are also a number of popular nature based visitor and picnic spots across the region where infrastructure has not kept pace with visitor demand. These locations also need to be updated and maintained to continue the important role they play for visitors and the local community alike. Without an uplift in their investment, they are in grave risk of rapid degradation to the point they will not be safe for visitors or locals.

These four projects provide enormous strength for the region to leverage destination outcomes to improve the way visitor experiences are enhanced, while aligned to the key product pillars of the region. Many will take the majority of this DMPs lifespan to be delivered and the collective visitor economy needs to work together to ensure they appropriately integrate with the local community, are maintained effectively and marketed widely.

What the region needs

It's recommended that a comprehensive activation plan be developed in respect of Diamond Creek Trail, the Chelsea Australia Garden at Olinda and the three Ridges and Rivers Project attractions. There will need to be alignment between these plans to ensure they complement each other; provide an excellent visitor experience and spread visitation across the entire week.

This coordination will help maximise the economic benefit and minimise congestion, thus enhancing social license for the investment.

How this will be achieved

A comprehensive activation plan would include the following actions.

- Accommodation analysis of supply and likely demand for relevant walker and cyclist focussed accommodation in the immediate vicinity of the attractions. This can be undertaken as part of the recommended preferred site identification project detailed in the Statutory Planning & Environment and Accommodation section of this DMP. Additionally, purpose built demountable accommodation could potentially be utilised for cyclists (Road, Trail and MTB) and hikers and located in nearby caravan parks

It is imperative that each of these projects are developed in a way that is consistent with the key objective of the DMP and do not principally become day trips for visitors because this will undermine the region's social license for tourism.

The Chelsea Australia Garden will appeal to those who like to "engage with nature" and enjoy seeing the beauty of the region in a more passive way.

The Ridges and Rivers Project attractions provide walking, cycling and mountain biking opportunities for those who prefer to be "active in nature".

Chelsea Australian Garden at Olinda

In 2013, Phillip Johnson, Wes Fleming and the Trailfinders team's 'Australian Garden' display became the first ever Australian entry to win at the Royal Horticultural Society's (RHS) Chelsea Flower Show. The display was toured by the Queen and was unanimously voted 'Best in Show' by the judges.

In a partnership between Parks Victoria and Phillip Johnson, this award-winning garden has been re-created as a permanent display at the Dandenong Ranges Botanic Garden in Olinda. It is accessible for people of all abilities and showcases sustainable design and habitat creation, using solar power and water-wise design features.

20
x

bigger than the original display

15,000

plants used

400

Australian plant species, including a collection of rare and endangered species



Source: Parks Victoria website

or farmland subject to the planning scheme.

- Identify how the proposed transport hubs and services referred to in the Transport section of this DMP can help serve these attractions to help reduce vehicle congestion.
- Create and promote mid-week and night-time events and activities at

these locations to support the desire to grow the mid-week and night-time economy.

- Create and promote multi-day itineraries to encourage use beyond one single site on one day. This can apply both to the cycling community through promotion of the various trails and tracks but also to those

THE RIDGES AND RIVERS PROJECT

This project consists of three signature outdoor attractions.

- **The Yarra Valley Trail**
- **Ngurrak barring | RidgeWalk**
- **Warburton Mountain Bike Destination**

These three attractions incorporate world class walking, cycling and mountain biking facilities in the forested ridges of the Dandenongs and Yarra Ranges, and through the pastures and rivers of the Yarra Valley.

It includes a \$38.2 million investment in the region and is funded by Federal Government, State Government, Yarra Ranges Council and Bendigo Bank (Warburton & Yarra Junction).

HIRING 500
local jobs created



\$80 million
injected into the local economy

<https://www.yarraranges.vic.gov.au/Experience/Ridges-and-Rivers>

more interested in passive recreation, eg, visiting the region's beautiful parks and gardens. For example, an itinerary that focusses on the Chelsea Australia Garden could also include other attraction profiles and suggestions to visit other iconic gardens and nature-based settings in the Dandenong Ranges (Alfred Nicholas, Dandenong Ranges Botanic, Arboretum, Burnham Beeches, Tulip Festival etc).

- Promotion to target markets that are more likely to stay overnight. Partner with Tourism Australia, Visit Victoria and Go Beyond Melbourne Touring Route to promote to international and interstate audiences.
- Develop a series of guided walks, or tours at the Gardens and across the Ridges and Rivers trails as an opportunity to share the history and stories of the region. This would ideally be with the involvement of the

Wurundjeri Woi Wurrung – whether as a personally guided tour or through use of signage and digital technology.

- Engage with local food and drink businesses to create picnic hampers or lunch packs for those visiting the Gardens or bike / walker friendly meal packs that can be carried on the journey.
- Investigate the need for guided walking operators and a day-time luggage transportation system where a cyclist / walker's belongings are transported from one accommodation house to another. These systems are common in the multi-day walk market and may appeal to a multi-day bike rider / walker who does not want to carry their belongings – particularly if children are involved.
- Potentially seek certification from Ecotourism Australia for the projects

to reinforce the values and their status as leaders in ecotourism and sustainability for nature-based experiences. See <https://www.ecotourism.org.au/our-certification-programs/eco-certification>

- Continue to work with Melbourne Water on the implementation of the Yarra Strategic Plan 2022-2032, including in respect of recreation and wellbeing opportunities.

It's important to note that while individual actions and plans are being considered as part of the relevant regional and local trails and recreation strategies, it is recommend that a bespoke and integrated activation plan be developed for each of these five new key attractions to maximise their benefits to the YVDR region.

Through its touring route, support for Go Beyond Melbourne can assist in driving overnight and midweek visitation.



Photo: Visit Victoria

YARRA VALLEY TRAIL

The Yarra Valley Trail has been called a “game-changer” for tourism in the Yarra Valley.

Work is underway to build a network of trails, connecting Lilydale, Yarra Glen and Healesville, with a vision to link up to the Lilydale-Warburton Rail Trail, creating a valley-wide loop.

The trail will provide walking and cycling infrastructure for the local community with improved safety and accessibility. It will assist tourists to explore the natural beauty of the region and link to wineries, art, culture, and iconic tourism places such as the Healesville Sanctuary.



Once complete, the trail is expected to attract a significant number of tourists and boost the tourism economy.

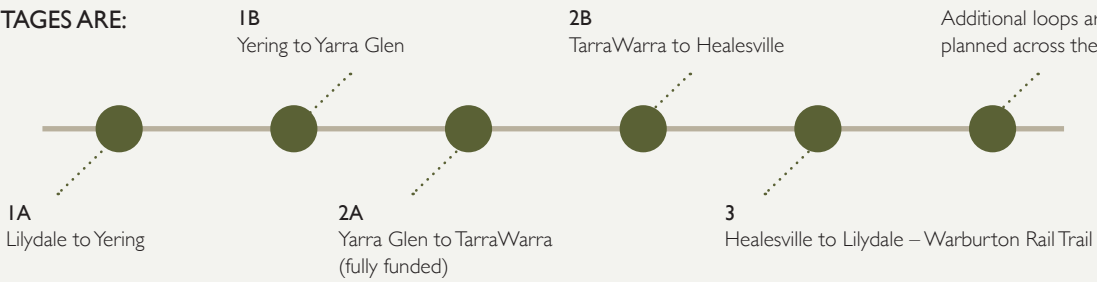


370,000 users annually



\$33.5 million economic spend generated

THE STAGES ARE:



The masterplan was approved in 2021 and Stage 1A is complete. Work is now focussing on stage 1B with planning on Stage 2 well underway, starting with the northern loop (fully funded). Building strong momentum for the future.



Proposed Stage 2 of the Yarra Valley Trail

Source: <https://www.rideyarraranges.com.au>

NGURRAK BARRING | RIDGEWALK

Ngurrak barring | RidgeWalk comprises 39 kilometres of walking track allowing hikers to explore the natural wonders, rich histories and cultural offerings of the region. It will also include a program of temporary exhibitions and performances.

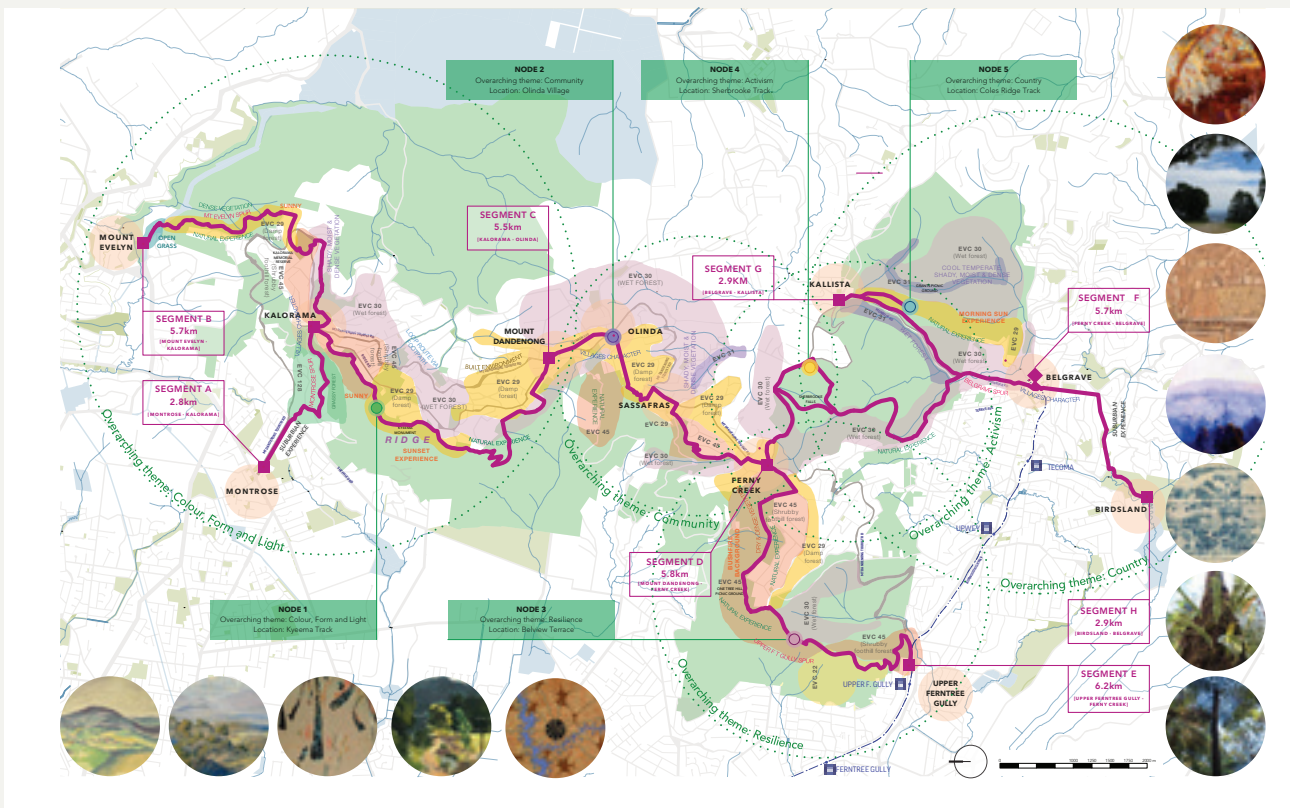
The underlying values that support the ngurrak barring | RidgeWalk are consistent with the Global Sustainable Tourism Criteria and

include: Transformational, Environmental, Culturally Respectful, Participation and Dynamic.

It has core creative themes of Activism, Country, Community, Resilience as well as Colour, Form and Light.

Another benefit of ngurrak barring | RidgeWalk is that it will also connect key townships along the walk as detailed in the plan extracted from the Masterplan below.

- 39km**
of trails in total
- 14km**
of new trails
- 158,000+**
visitors each year
- 68,000+**
overnight visitors each year



<https://www.yarraranges.vic.gov.au/Experience/Ridges-and-Rivers/Ngurrak-barring-Ridgewalk>

The Masterplan also includes projected visitor demand figures prepared by Urban Enterprises in 2020 to be:

VISITOR MARKET	2023 - 4: YEAR 4	2029 - 2030: YEAR 10
Daytrip	74,443	89,930
Domestic Overnight	45,606	56,157
International Overnight	8764	12,122
Total Demand	128,813	158,309
Existing Visitors	74,443	89,930
New Visitors	54,370	68,379

These figures show that the expected new visitors who specifically visit ngurrak barring | RidgeWalk are all overnight visitors (domestic and international). This confirms the need for tourism-related strategies that provide accommodation, food and beverage, transport luggage transfers and multi-day itineraries.

WARBURTON MOUNTAIN BIKE TRAIL DESTINATION



A world-class mountain bike trail development has long been planned for Warburton. The proposed Warburton Mountain Bike Destination project originally included up to 177 kilometres of trails across three main zones: Mount Donna Buang, Mount Little Joe and Mount Tugwell. The trails would connect with the popular Lilydale-Warburton Rail Trail and the O'Shannassy Aqueduct Trail. The main trail head for Stage 1 is at Wesburn Park as discussions continue for the proposal at Warburton Golf Course.

In November 2022, the Minister for Planning completed an assessment of the Project under the Environment Effects Act and gave approval for the majority of the project to go ahead with the deletion of some of the trails. Stage 1 of the Project is now proposed to deliver 113km of trails with four trail heads. It has been funded with a budget of \$11.3m. However, it is estimated that around \$6m has been spent on the environmental effects statement and Yarra Ranges Council is now faced with a significant shortfall to complete the entire project.

One of the key purposes of the Trail investment is to provide a growth boost to the visitor economy as well as supporting a healthy and active community.

It is anticipated that the trails will be used by:

- local residents
- residents from surrounding townships
- visitors to the region seeking nature-based and adventure tourism opportunities, and
- national and international mountain bike riders.

The Warburton Mountain Bike Trail Destination is expected to be fully developed by 2032 and deliver significant tourism benefits and enjoyment to mountain bike riders.



\$31.2 million
economic spend generated each year



128,000
new visitors to the Yarra Ranges



222,000
rides each year



77,000
overnight visitor stays generated

Source: <https://www.rideyarraranges.com.au/warburton-mtb-destination/>

Action items – product priorities

Nature

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Nature – Passive Recreation	1. Collate currently available information and if necessary, undertake an audit of current facilities and amenities at nature related sites (key rivers, parks, lakes and gardens) focussing on user needs including accessibility, water stations, toilets, emergency management plan, signage and wayfinding with key action & advocacy outcomes.			✓	Local Councils, DEECA, Melbourne Water, Parks Vic	S
	2. Create marketing plans to showcase the Chelsea Australian Garden at Olinda by Philip Johnson and other iconic gardens in the region (eg, Alfred Nicholas, Dandenong Ranges Botanic, Arboretums, Burnham Beeches, Tulip Festival, Karwarra Australian Native Botanic Garden) to enable development of multi destination and overnight visitation.	✓			Local Councils, DEECA, Melbourne Water, Parks Vic	S
	3. Develop product for guided walks, wildlife and bird watching with potential alignment to Traditional Owner experiences. Ngurrak barring RidgeWalk also has potential for this. Particular focus should be given to flora and fauna that is either endangered or at risk in the region to increase awareness and education of visitors. (e.g. Eltham Copper Butterfly, Powerful Owl, Brush-tailed phascogale, Matted Flaxlilly, Charming Spider Orchid, Rosella Spider Orchid, Helmuted Honey Eater and Leadbeater's Possum).		✓		Industry	S
	4. Embed natural landscape visuals in the region into marketing of the area as a key product strength.	✓			Local Councils, Industry	S
	5. Invest in mid-week night-time activities, including nature walks/ garden based experiences at sunrise/sunset linked with accommodation offerings.		✓		Industry	M
	6. Advocate for investment in Healesville Sanctuary as Victoria's premier native flora and fauna park with a heightened focus on visitor experience and highlight the role that the visitor economy can play in the zoo's conservation strategies.			✓	Industry, YR Council	M
	7. Support the Wurundjeri Woi-wurrung Aboriginal Cultural Heritage Aboriginal Corporation in their plans for the development of the Nangenala property in Healesville including the potential development of a cultural centre and nature based visitor experience.			✓	Wurundjeri Woiwurrung Aboriginal Cultural Heritage Aboriginal Corp. YR Council, Industry	M
	8. Continue to work with Melbourne Water in respect of the implementation of the Yarra Strategic Plan 2022-2032 including in respect of recreation and wellbeing opportunities.		✓		Local Councils	M

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Nature - Active Recreation	1. Collate currently available information and if necessary, undertake an audit of current facilities and amenities at nature related sites (walking, cycling, hiking, horse riding, water/paddle) focussing on user experiences and needs including accessibility, water stations, good road access, public toilets, emergency management plan, signage and wayfinding with key action & advocacy outcomes.			✓	All public land managers	M
	2. Create activation plans to leverage the Ridges & Rivers projects and Diamond Valley Rail Trail to create additional regional benefit and support development of multi destination and overnight visitation.	✓		✓	Local Council, Land Managers, Industry	S - M
	3. Undertake familiarisation activities with journalists and bloggers related to new and revamped nature product opportunities.	✓			Industry	S
	4. Increase awareness of mountain bike trails including Warburton and Smiths Gully areas and create event marketing strategy to maximise impact.		✓		YR Council, Nillumbik Council	S
	5. Create visitor products with local businesses that can support MTB users to encourage overnight or multi day visitation including bike friendly accommodation.	✓			Local Councils, Industry	M
	6. Facilitate dynamic pricing strategies with industry to favour mid-week.			✓	YR Council, Local Councils, Industry	M
	7. Continued advocacy for linkages between planned trail infrastructure to incorporate the whole tourism destination.			✓	Local Councils, Industry	M

Sustainability impacts

GSTC criteria applied

- 

Section A: Sustainable management
- 

Section B: Socio-economic sustainability
- 

Section C: Cultural sustainability
- 

Section D: Environmentally sustainability

UNSDG impacted



STRATEGIC PRIORITY 5B

Food & Drink: Elevating the region's reputation

VISION

Yarra Valley and Dandenong Ranges will strengthen its reputation as a premier food and drink destination that celebrates the region's unique offerings. By showcasing the full breadth of the products and expanding accessibility beyond weekends and lunch times, the day trip issues facing the region will be addressed. The focus will be on promoting local provenance, protecting product integrity and quality, and fostering collaboration to build a sustainable and resilient food and drink ecosystem that supports the community and delights visitors.

Overview

We know that the YVDR strengths in food and drink align strongly to the State's key visitor markets.

Yarra Ranges is particularly strong in growing and producing food from cherries, cheese, stone fruit, beef, lamb, pork and game.

The YVDR has a global reputation for producing the finest wines and gin.

The consumer research for this DMP revealed that the number one option that would make visitors stay longer is Food & Drink (see page 13).

Many regions around Australia have been focusing on lucrative food & drink tourism in their destination plans and have been aggressively developing new products and promotions.

While YVDR has a number of leading food & drink products, it cannot afford to stand still in this area. It must continue to develop food & drink offerings that are at the top of every foodie and local's "must-experience" list.

Some other regions have established signature destination restaurants in their areas to encourage visitor dispersal, and act as a focal point for the development of local food culture and capability. This has been demonstrated by the success of Brae, which attracts diners from around the world to Birregurra in the Otways.

Developing the agritourism sector is also an opportunity to create innovative new products, trails, and collaborations. This provides the opportunity for visitors to have an authentic "hands on" experience of life on a farm.

Each year Wunderman Thompson

Intelligence explores consumer trends to understand consumer behaviours that employ creative innovation. Below are some of the most relevant insights for culinary tourism:

- Consumers are looking for natural landscapes that offer the chance for consumers to enjoy unspoilt surroundings while preserving the environment.
- More local destinations are being rediscovered amid consumer sentiment for safer travel destinations.
- There is a growing increase in consumers focussed on the philosophy of good for their health and good for the planet. There is an opportunity to celebrate the abundance of fresh and locally grown food and the large number of businesses embracing sustainability into their business model in the YVDR.
- A meal, even breakfast, can become an experience in itself. Given the increase in eating breakfast out over the last few years there is an opportunity to build on Yarra Valley sunrises as well as sunsets through brunch events and experiences in extraordinary places.

Reference: Bianca Bridges, author of Breakfast London: Where Real Londoners Eat dedicates a book to the rise in eating breakfast out.

- Hospitality operators are positioning private dining as the latest luxury when eating out. These experiences explore a future of culinary experiences where privacy and personalization are central. i.e., Bord för En ("table for one") The pop-up restaurant was designed to let single diners enjoy a different kind of meal out. Situated in the middle

of a Swedish summer meadow, 200 miles from Stockholm, guests dine alone at a single chair and table, helping themselves to a three-course gourmet meal that arrived in a traditional picnic basket delivered via a cable connected to the kitchen.

Source Wunderman Thompson Intelligence "The Future 100: 2021"

State of play

Without a doubt, the YVDR is well known for its amazing wines and is regarded as one of Australia's, and indeed the world's, leading wine-making regions. It is also building a strong name for itself for premier dining experiences.

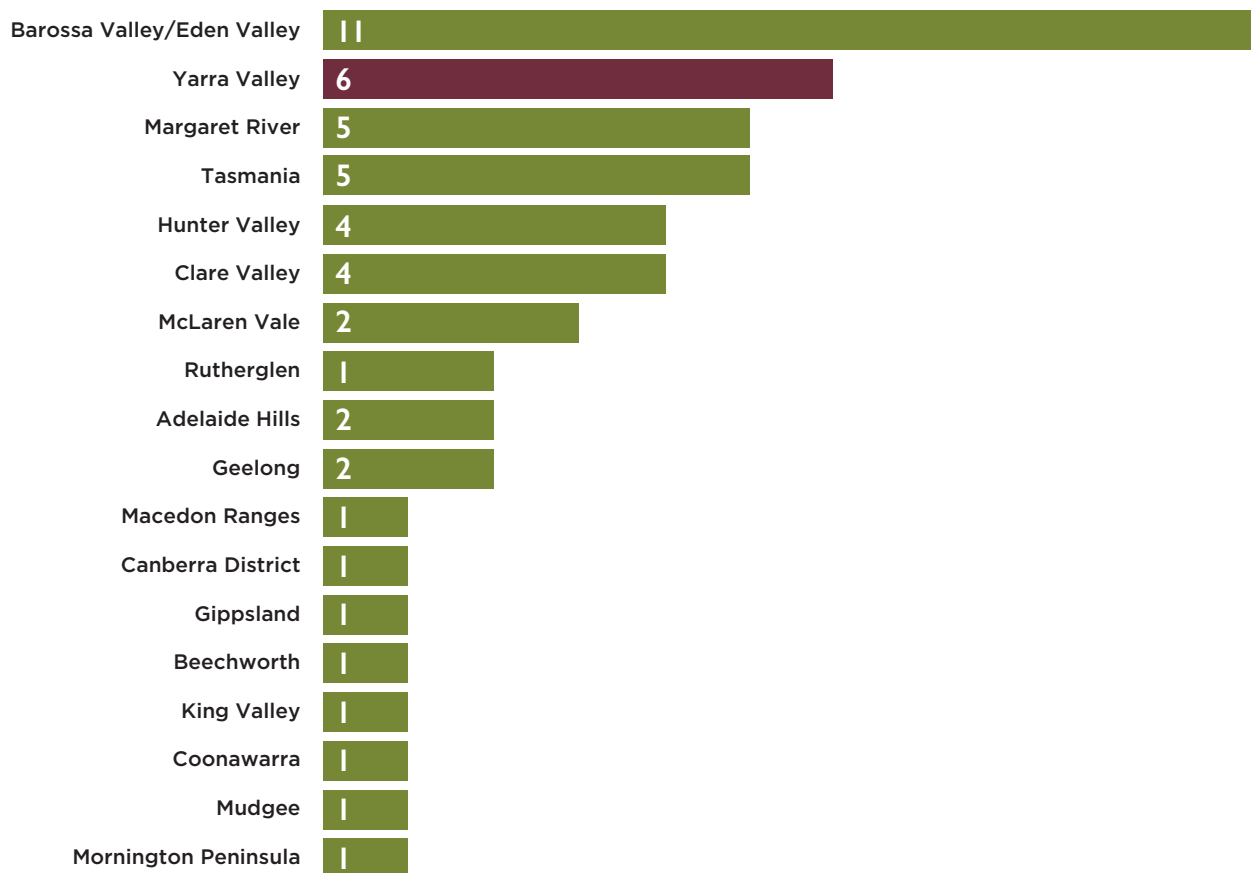


Wine

#2 in Australia

The *Real Review* published its *Top Wineries of Australia* in 2023 and ranked the Yarra Valley as the number two wine region in Australia, with six Yarra Valley wineries featuring in the top 35 of 52 in total.

How did the regions rate?



<https://www.therealreview.com/wine-regions/au/top-wineries/2023/>

The six YVDR wineries and their rankings in the top 52 were:

- Oakridge Wines – # 2
- Yarra Yering – # 11
- Coldstream Hills – # 24
- Levantine Hills – # 25
- Giant Steps – # 26
- Dominique Portet – # 34

Other wineries in the top 100 were Mount Mary Vineyard (65), Rochford (67) and Yering Station (97).

In more recent times, the YVDR has also become the home to some of the world's leading gin distilleries and craft breweries. Award winning gin distilleries in the YVDR, such as Naught and Four Pillars, have led the way for both product and customer experience.



Food

Seven restaurants in the YVDR were awarded a 'hat' in The Age Good Food Guide 2023:

- Greasy Zoes – Hurstbridge (2 hats)
- O.My – Beaconsfield (2 hats)
- Jayden Ong Winery & Cellar Door – Healesville
- Heartwood – Yarra Glen
- No7 – Healesville
- Oakridge Winery – Coldstream
- Tarra Warra Estate – Yarra Glen.

The extraordinary quality of the produce grown in the YVDR is less well known than in other regions, especially when considered in the context of farm gate experiences.

However, there is a perception, particularly among leading food journalists, that the region has generally lost its innovative edge in the food and dining experience. This may be because many of the new restaurants and cafes are focusing on more mass market food, such as woodfire pizzas, pasta and antipasto plates.

Meanwhile, there are some venues and growers that are striving to do things differently. Four Pillars Distillery has set a new standard in cellar door tasting experiences by focussing on a concierge service from start to finish that is completely connected to the distilling process and their carbon neutrality.

What the region needs

The region needs to take genuine leadership in the drinks segments and create closer connections to food through an integrated strategy that links the restaurant table, cellar door, distillery, on-farm and at the farm gate experiences. This will transfer food and drink consumption into an experience that personifies the region. This strategy can also evolve into a key driver to enhance the mid-week and night-time economy and attract new restaurants and visitors who will add value beyond a day trip.

How this will be achieved

Establish a significant regional event to showcase the YVDR food and drink

A new multi week Yarra Valley Food & Wine Festival held outside peak season should be developed to attract visitors for the entire duration of the festival and build brand equity for the YVDR.

The event would not be targeted at the mass market day trip visitor, but ideally focus on a 'slow food' model that showcases local produce and drink. It would include special mid-week lunch and dinner menus, as well as at weekends. Bespoke experiences would include special event menus, chef tables and meet the chef / winemaker experiences with a night-time focus. A curation of "hands-on" makers courses would be offered. These bespoke activities rated strongly as desired experiences in the consumer research.

The festival should also seek to elevate the inclusion of vegan, sustainable, First Peoples and local offerings to create an authentic experience and attract a new audience.

The festival can draw inspiration from elements of the Melbourne Food & Wine Festival by offering a range of events spread right across the region for an extended period. These events should also attract smaller groups and not just be focussed on mass market activity.

A centrepiece of the festival could be a "celebrity chef pop-up" restaurant to draw additional publicity and promotion and support the region's credentials. Examples of recent pop-up restaurants in Australia include:

- L'Enclume – leading UK restaurant coming to Balmoral in Sydney for five weeks
- Luke Mangan (Luke's Kitchen) has teamed up with Bridgeclimb to launch a pop-up restaurant in the Sydney Harbour Bridge's south-eastern pylon.



While the region has a number of hatted restaurants, in several instances they have yet to establish the long-term reputations of leading regional restaurants, such as Brae in Birregurra or the Lake House in Daylesford.

The Lake House is an example of a true destination restaurant whose reputation is built not only on its food, location and ambience, but also the quality of its services, which extend to classes, day spa and accommodation. It is internationally renowned and is a draw card to the region both mid-week and on weekends.

Brae is another example of a regional destination restaurant. It was named in the World's 50 Best Restaurants 2021 and the Good Food Guide 2020 Restaurant of the Year. Set on a hillside in Birregurra, Victoria, Brae is a contemporary restaurant and has six luxury guest suites on a working organic farm. It is a place to be immersed in nature and eat from the land.

The proposed Festival will be a catalyst to help build and grow the reputation of the premium award winning restaurants in the YVDR.

It is acknowledged that the region has had several attempts at creating a festival over many years. For this to be a success, a partnership approach is needed. Many operators have held back from participating in previous events because they view themselves as being busy enough on weekends and do not want to create additional activities mid-week – both in the short and long term. The benefits of the festival to both the industry and the region will need to be clearly

articulated, especially if it's held outside a peak period. Promotional support from Visit Victoria will also be required to attract visitors who can come during the week – especially interstate travellers.

Develop a Regional Retail Food and Drink Centre showcasing local food & drink.

A new Retail Food and Drink Centre located strategically in the YVDR can play an important part in both the region's provenance and assisting with management of the day trip market.

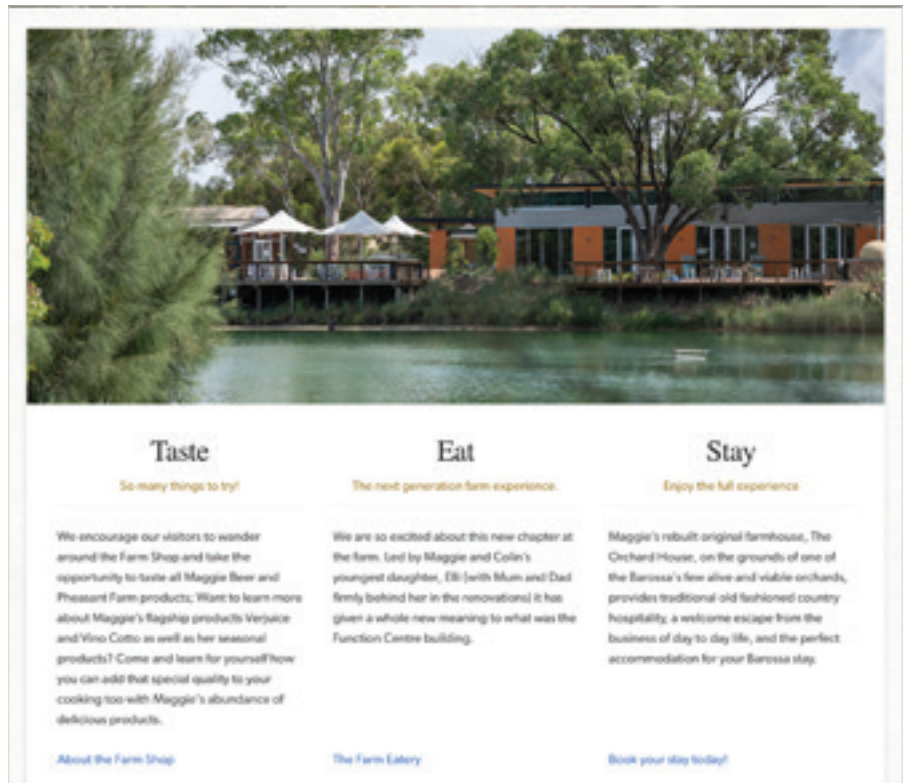
As well as promoting the major brands in the region, the Centre would support the smaller and emerging producers that may not have suitable visitor facilities and amenities at their winery, distillery, brewhouse or farms. They would be able to sell, showcase and let customers taste wines, without the need to have an "always open" cellar door. A tasting area would be a highlight where a visitor could taste various wines, gins and beers from the region.

Tastings that showcase local produce would also be available. The Centre would provide a significant retail opportunity for the local producers. The Yarra Valley Chocolaterie and Ice Creamery is a successful example of an individual local produce visitor experience, yet the aim would be for the Centre to showcase a broader food and drink experience.

An inhouse concierge / visitor information service could be available for those on multi-day visits. By locating the Centre away from the inner regional towns (but still providing a YVDR nature experience) it could become a destination in itself for those on day trips, helping to reduce congestion in those towns.

Ideally, but depending on the level of investment available, a restaurant serving local produce and drinks should also be a key component.

An Australian example of such a regional food and wine store is the Maggie Beer Farm store in the Barossa Valley. It is a high-quality food and retail centre selling local produce and drinks as well as offering a restaurant



<https://www.maggibeer.com.au/visit-us>



<https://www.laciteduvin.com/en>

and cooking experiences. Whilst the store principally sells products from the Maggie Beer range, the concept for the Yarra Valley would be to sell a variety of local wines and food, potentially with pop-up cellar doors for small winemakers.

Centre of Excellence

A Centre of Excellence for the food and/or drinks industry could provide an additional experience and attraction within a larger Retail Food & Drink Centre.

A Centre of Excellence that not only showcases the food and drinks of the

region but also provides education, story telling, structured tastings and wine making classes would add value to the overall experience and create an additional revenue opportunity for an investor or to underpin government support. Meet the winemaker and hands-on classes were some of the highly regarded experiences sought by visitors to the region.

Whilst the concept of a Retail Food & Drink Centre combined with a Centre of Excellence is consistent with the consumer research and preferences, a more detailed feasibility study and business case needs to be undertaken

and funding should be sought from the state for this study.

Wine Yarra Valley has undertaken an initial business case to develop this type of facility and this should be used to inform preliminary plans in the area.

The **Cite du Vin in Bordeaux, France** is an example of a new best practice “centre of excellence” in the wine industry.

Cite du Vin encompasses wine offerings, a museum, retail store and tasting room with many sensory experiences. It hosts a permanent exhibition showcasing the history of wine in Bordeaux and around the world. It provides hour-long tasting sessions with a sommelier focussing on education through visual, sounds and

story telling. It also has a retail shop, wine making classes, extensive wine cellar, brasserie, snack bar and fine dining.

Build a higher profile for the region’s provenance and products through on-site agritourism (both small and larger scale) with visitor facilities providing experiences of excellence.

The aim is for the councils to facilitate agritourism or farm gate opportunities within YVDR, through review of the planning scheme to ensure fitness for purpose. This has benefits to land regeneration, tourism and sustainable food production by providing local food for local people. These farms and experiences would showcase best practice in sustainable farming and

provide authentic engagement with local produce and sustainable practices.

Once clarified, YRT and the industry can promote the opportunities for more bespoke and boutique agritourism experiences in the YVDR.

Experiences can range from as simple as a farm gate stall selling honey to a more sophisticated model whereby visitors not only see behind the scenes of a farm but also get to pick, eat and stay overnight on the farm. They can also learn more about sustainable practices and the true meaning of “paddock to plate”.

Some examples of high quality agritourism visitor experiences and facilities, both in Australia and elsewhere, are shown below.



AGRARIAN KITCHEN, NEW NORFOLK, DERWENT VALLEY, TASMANIA

The Agrarian Kitchen Cooking School and Farm was borne from a longing to connect back to the earth, and to grow and cook authentic food with real ingredients. It has welcomed guests from around the world to share in this experience, for good food is even better when shared. The garden is one acre in size, it is a space to grow vegetables for the restaurant,

kiosk and classes. It is a space for learning, insight, and inspiration, where visitors can take garden tours, cooking classes, gather ingredients for the day or where keen gardeners garner knowledge during workshops.

Their menu sources ingredients from the land around them, whether it's their own garden, the community

garden across the road or a network of local gardeners, producers, farmers and fishermen. The philosophy also extends to what is in your glass, where a responsible radius is applied to our selection of wine, beer and spirits.

The vision is to create a space where local, seasonal produce is celebrated.



<https://www.theagrariankitchen.com/>

THE FARM BYRON BAY

GROW. FEED. EDUCATE. GIVE BACK is the ethos of the Farm in Byron Bay

The Farm encourages everyone to enjoy the surroundings of a real working farm and be inspired to talk and experience where food comes from. Children can meet up close heritage black pigs and watch them in their natural surroundings and be amongst the chickens whilst enjoying some of the best things in life, sunshine, and fresh air. Kids will run around the fields of macadamia and pecan trees and generally enjoy some play time on the grounds.

<https://thefarm.com.au/>

Agritourism opportunities can be quite specific but still attract great interest. Beekeeping is one such example.

BEE AMAZED

Bee Amazed Garden is a unique visitors' centre in Singapore. BEE AMAZED Garden offers educational programs, corporate workshops, family activities, honey tasting, environmental talks and basic beekeeping lessons. Educational programmes, family activities and corporate workshops can be customised accordingly.



<https://www.beamazed.com.sg/>

Create a regional marketing plan to support the region's food and wine product

Consultation and market research showed a lack of awareness about the existing fantastic food and wine product in the region. To address this, a sector-wide regional approach to marketing is required. Currently, Victorian wine regions are at a significant disadvantage for funding for promotional events compared to other high-profile wine regions.

It's recommended that YRT lead the process of aligning marketing activities with Wine Yarra Valley and other industry groups to enhance the food and drink profile in the region and advocate with a collective voice for government support to deliver the activities agreed. The Future of Tourism Demand, produced by Tourism Australia, should be used to help determine international target markets.

There are several other tactical and strategic action items for the food and drinks visitor economy detailed under the Key Action Items.



Action items – product priorities

Food and Drink

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Food and Drink	1. Continue to encourage and facilitate improved cellar door experiences in the region - make cellar doors & tasting rooms more experiential.			✓	Wine Yarra Valley, Industry	S
	2. Continue to raise the profile of visitor experiences for food and drink across the region through annual marketing activities as a priority.	✓			Local Councils, Industry association and groups	S
	3. Pilot night-time economy activities with interested businesses linking bespoke drink experiences with accommodation in dedicated regions.		✓		Local Councils, Industry	M
	4. Develop a business case for a regional retail food and drink centre showcasing local food & drink (potentially including a Centre of Excellence) as well overall regional experiences. If the business case is positive, advocate for the development of the centre.		✓		Wine Yarra Valley, Visit Victoria, Local Councils, Industry, Government	M
	5. As part of the development of a regional events strategy develop an annual Food and Drink festival in the region with a focus on bespoke mid-week, dawn and dusk experiences potentially around key vintage/ harvests releases. This should investigate the opportunity to leverage existing events being delivered in the region (e.g. Fireside) to determine if growth is possible or new events are required.	✓			Wine Yarra Valley, Visit Victoria, Local Councils, Industry	M
	6. Create a Visitor Ambassador Program to raise awareness of experiences across the region to increase collaboration opportunities and cross promote activities to drive additional length of stay.	✓			Local Councils, Industry	S
	7. Work to attract an international standard and marketed multi hatted restaurant eg, Brae to put the Yarra Ranges on the map interstate and potentially internationally as a leading food destination.		✓		Visit Victoria, Local Councils, Industry	M
	8. Develop marketing strategy to showcase product and provenance of regional product including: Encouraging promotion of product and detailed provenance through city and local restaurants, famils with key local and international food journalists to showcase both agribusiness and dining experiences on offer. Partner with key media channels and cooking shows to showcase agribusiness and key tourism assets.		✓		Local Councils, Industry	M
	9. Consider development of "food foraging" and "forest to plate" opportunities or experiences and expanding and aligning existing farm gate events in the region.	✓			Local Councils, Industry	S

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Food and Drink	10. Explore and facilitate agribusiness opportunities by building a higher profile for the region's provenance and products through onsite agritourism with visitor facilities providing experiences of excellence. Promote the opportunity for wineries and farms to develop authentic host farm experiences where visitors can stay and experience the daily operations of the winery/farm.	✓			Local Councils, Industry	S
	11 Explore partnerships with Melbourne Food and Wine Festival and other major Melbourne events to pilot night-time economy activities with interested businesses supported by YRT and other partners.	✓			Local Councils, Industry, Wine Yarra Valley	S

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability

UNSDG impacted



STRATEGIC PRIORITY 5C

First Peoples Experiences: Embedding Traditional Owner values & experiences across tourism

VISION

The values of the Traditional Owners across the region will be embedded in the delivery of the Destination Management Plan (DMP). Consultation is continuing with the Traditional Owners groups on behalf of their community to support this. The DMP will guide the tourism industry in upholding these values. It also creates an opportunity for Traditional Owners to further develop First People owned and operated tourism experiences that support their core objectives.

Overview

YRT acknowledges the significance of the peoples of the Woi-wurrung language group that first occupied the areas we now know as the Yarra Valley and Dandenong Ranges. The key communities of the region include:

- Wurundjeri - the area of the Yarra River catchment
- Boonwurrung - the area of the northern Dandenong Ranges
- Taungurung - the area north of the Great Dividing Range in the Yarra Valley

First Peoples focussed tourism is a key emerging trend around the world. It is proposed that with the support and leadership of the Traditional Owner Groups in the YVDR, that it can become a driver for the visitor economy in the region whilst also meeting the values, aims and objectives of the Traditional Owners. It is also a key theme for sustainable tourism under the GSTC criteria and *Experience Victoria 2033 – Victoria Visitor Economy*.

State of play

The Wurundjeri Woi-wurrung, Taungurung and Bunurong people of the Kulin nation are the Traditional Owners of the YVDR region. The majority of the region, with a key tourism focus, is part of the traditional lands of the Wurundjeri whilst land in the south of the YVDR is Bunurong Country and in the northwest, Taungurung Country.

Whilst there are some First Peoples focused tourism projects in the YVDR, it is still an emerging area with a number more planned, especially in respect of nature tourism.

This DMP recognises it is imperative that the values, aims and objectives of the Traditional Owner communities are embedded not only in this DMP, but also in projects and key actions that arise out of it or form part of the visitor economy.

Whilst preliminary discussions and engagement have been held with the Traditional Owner groups in the YVDR in respect of these principles, continuing engagement to fully realise the benefits will be key to further developing the actions resulting from the DMP.

How will this be achieved

It is proposed that actions to be taken in relation to implementation of the DMP will address their key objectives. These actions will include:

- Ensuring that the key objectives of the Traditional Owner Groups are understood by the tourism industry and embedded in the development and implementation of relevant actions. Those objectives may evolve over the next 10 years but at present include: Culture, Country and People including social and

economic development, environment, employment, education, training and self-determination.

- The industry engages with the Traditional Owner Groups throughout the term of the DMP with the aim of developing a clear process by which the Groups are able to provide advice and input on how best to ensure their objectives are embedded in visitor experiences across the YVDR region.
- Led by, or with agreement of, the Traditional Owner Groups developing opportunities where cultural heritage and stories of the Traditional Owners are shared at relevant and meaningful locations throughout the region whilst ensuring the protection of the Intellectual Property rights of the Traditional Owners. This could be undertaken in numerous ways, including installation of infrastructure (signage, information boards), digital interpretation or directly as part of a tourism experience. The *Wominjeka – Welcome To Country* experience delivered by Murrindindi at Healesville Sanctuary is a Victorian Tourism Award winning example of such a tourism product.



- When requested, YRT, councils and the industry assist the Traditional Owner Groups in their capacity building to develop their own unique visitor experiences.
- Supporting the Wurundjeri Woi-wurrung Aboriginal Cultural Heritage Aboriginal Corporation in their plans for the development of the Nangenala property in Healesville, including the potential development of a cultural centre and visitor experience.
- Ensuring Acknowledgement of Country Statements and/or Welcome to Country ceremonies are conducted at key tourism industry functions and relevant experiences throughout the YVDR to continue to raise cultural awareness and respect.
- Encouraging local tourism businesses and their staff to undertake cultural awareness and environmental training with Traditional Owner approved or endorsed trainers or organisations.
- Provide employment opportunities for the Traditional Owner community across the tourism industry including, and in addition to, roles that have a connection with ensuring a healthy Country or provide an opportunity for their cultural heritage and stories to be shared in an approved manner.

Action items – product priorities

First Peoples

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Traditional Owners - Cultural Awareness and Interpretation/ experiences	1. Ensure that the key objectives of the Traditional Owner Groups are understood by the tourism industry and embedded in the development and implementation of relevant actions.			✓	Traditional Owners, Local Councils, Industry	S
	2. Led by, or with agreement of, the Traditional Owner Groups developing opportunities where cultural heritage and stories of the Traditional Owners are shared at relevant and meaningful locations throughout the region whilst ensuring the protection of the Intellectual Property rights of the Traditional Owners.		✓		Traditional Owner, Local Councils, Industry	M
	3. Industry engages with the Traditional Owner Groups throughout the term of the DMP with the aim of developing a clear process by which Traditional Owner Groups are able to provide advice and input on how best to ensure their objectives are embedded in visitor experiences across the YVDR region.			✓	Local Councils, Industry, Traditional Owners	S
	4. Discuss and develop with Traditional Owner Groups opportunities for culture awareness activities with local YVDR businesses and attractions eg ngurrak barring RidgeWalk.		✓		Traditional Owners, Local Councils, Industry	M
	5. Ensuring Acknowledgement of Country Statements and/or Welcome to Country ceremonies are conducted at key tourism industry functions and relevant experiences throughout the YVDR to continue to raise cultural awareness and respect.			✓	Traditional Owners, Industry	S
	6. Encourage local tourism businesses and their staff to undertake cultural awareness and environmental training with Traditional Owner approved or endorsed trainers or organisations.	✓			Traditional Owners, Local Councils, Industry	S
	7. Support the Wurundjeri Woi-wurrung Aboriginal Cultural Heritage Aboriginal Corporation in their plans for the development of the Nangenala property in Healesville including the potential development of a cultural centre and visitor experience.			✓	Traditional Owners	M

First Peoples

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Traditional Owners - Cultural Awareness and Interpretation/ experiences	8. Assist Traditional Owner Groups in the development of a range of Traditional Owner owned, led or endorsed visitor experiences, including night-time, that complement existing and new product to support the principles of economic self determination.		✓		Traditional Owners	M
	9. Provide employment opportunities for the Traditional Owner community across the tourism industry including, and in addition to, roles that have a connection with ensuring a healthy Country or provide an opportunity for their cultural heritage and stories to be shared in an approved manner.		✓		Local Councils, Traditional Owners,	S
	10. Undertake an audit of First Peoples tourism product in the region and develop comprehensive list of First Peoples experiences across the region including opportunities to provide connection to country for Traditional Owner groups.		✓		Local Councils, Traditional Owners,	S
	11. Tourism stakeholders be ready to assist the Traditional Owner Groups in their capacity building to develop their own unique visitor experiences.		✓		Traditional Owners, Local Councils, Industry	M

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability



Section C: Cultural sustainability



Section D: Environmentally sustainability

UNSDG impacted





STRATEGIC PRIORITY 6

Leadership and Advocacy

One of the key findings through the consultation stage with industry was a perceived lack of clarity of the purpose and functions of the numerous organisations that play a role in leading, shaping and advocating for the YVDR visitor economy.

This led to confusion and perceived inefficiencies. Industry highlighted the need for more clarification of roles and objectives with potential consolidation.

STRATEGIC PRIORITY 6A

Governance & Leadership: Delivering efficiently

VISION

All organisation's involved in the visitor economy will effectively collaborate and streamline coordination, as well as outline clear roles and responsibilities to drive the best outcomes over the next 10 years. Sufficient funding for the peak tourism agency and a commitment to work together towards common goals will help achieve this. This cohesive and efficient approach to the development of the region's visitor economy will lead to increased economic growth and a better visitor experience.

Overview

A number of organisations in the YVDR play a role in the ecosystem that makes up the region's visitor economy. With so many organisations involved, there is a risk of uncertainty about the roles and responsibilities when delivering and implementing the actions of this DMP. This was highlighted during consultation. There's also a risk of diluting the effectiveness of funding. A cohesive and coordinated approach will enable this DMP's key actions to be delivered efficiently, while maximising these organisations' collective expertise and resources.

State of play

Most of the YVDR tourism industry consider that YRT's core mandate is to market and promote the region, principally to the Victorian market, to stimulate tourism demand.

Yet as well as this work, YRT plays a significant role to develop the industry at a every level.

These main activities are:

- Product development
- Industry development - Training
- Member networking
- Council liaison

- Advocacy to local council and State Government Ministers and Departments, Visit Victoria and Tourism Australia
- Securing funding for the tourism industry
- Event ideation
- Investment attraction

It does this with a limited team and budget operating under the governance of a volunteer board. These challenges are not unique to YRT and apply to most of the Regional Tourism Boards across Victoria. Indeed, it is one of the reasons why the Victorian Government's Visitor Economy Recovery and Reform Plan proposes the transition of the existing network of Regional Tourism Boards into a new network of Visitor Economy Partnerships (VEPs) with the goal of increasing their capacity, capability and collaboration through greater scale with more resources.

The State Government has proposed that VEPs are independent destination management entities recognised by the Victorian Government as peak official voices for the visitor economy in their region. VEPs will be expected to collaborate with the Victorian Government, councils, regional tourism



organisations and industry to set the vision and manage the growth of their region’s visitor economy, ensuring alignment with the state’s goals.

VEPs will also be expected to deliver on the state’s vision through supply and demand activities to support the growth of their region’s visitor economy. VEPs are proposed to have core responsibilities to:

- deliver enhanced leadership and collaboration at a regional level
- tailor industry strengthening support to address regional needs
- encourage increased community support for tourism
- facilitate enhanced visitor dispersal and experiences
- undertake collaborative destination marketing and regional conversion
- provide insights and investor connections that inform a strengthened pipeline and product development
- provide regional context and insights to inform government policy development, decision making
- identify investment priorities and
- ensure continued crisis preparedness and support relative to the visitor economy

In addition to YRT, there are several other councils, industry and community organisations that provide similar services to those also provided by YRT. This is highlighted in this DMP regarding the need for “one voice, once message” for advocacy, but the issues are much broader due to the duplication of activity across numerous groups involved.

In effect, the governance and leadership of tourism in the YVDR is an ecosystem detailed below.

One of the benefits of such a model is that across the numerous groups there are many people who have the expertise and will to help and grow the visitor economy.

Yet there’s a risk that this benefit is offset by the challenges of duplication, inefficient use of resources and confusion as to roles and responsibilities. This was raised as an issue during consultation for this DMP.

In addition, several of these member-based organisations compete for members and the industry associations may compete for government grant funding.

This is to the detriment of the visitor economy for the region.

For example, if several groups spend money on marketing, this is not as efficient as creating one strategically focussed central marketing fund. YRT seeks to include active representatives in its activities from these groups, such as its Marketing Sub Committee, DMP Steering Committee and LUNA Steering Committee, along with hosting bi-annual gatherings of local associations to share what they are doing. However, with nearly all local groups resourced by volunteer labour who are generally running a business of their own, it is challenging to gain regular participation.

What the region needs

YRT and tourism groups need to work together to ensure clarity of roles and responsibilities for local government, local tourism associations, chambers of commerce and industry stakeholders in relation to delivery of the DMP’s actions. In the longer term, some consolidation of the ecosystem would be beneficial.

How this will be achieved

1. Establishment of a DMP Implementation Committee

Under the auspices of YRT, a committee should be established comprising members of this tourism ecosystem. This committee will oversee the implementation of this DMP and the underlying actions and recommendations. The Project Steering Committee for the DMP comprises representatives from these organisations and may provide a model upon which the DMP Implementation Committee can be based. Potentially some sub-committees could also be established in respect of specific areas, such as Advocacy or more location-based issues, arising from the LAPs.

2. Clarification of roles and responsibilities

It’s recommended that each organisation clarify its roles and responsibilities in respect of the visitor economy through a survey based on the following framework. Each organisation would complete the survey providing information on its role under each of the headings. Ideally budget and staffing details would also be provided.



SECTION 5: DMP INITIATIVES • STRATEGIC PRIORITY 6A

Once this survey has been completed, all participating groups, including councils, should meet to review the results and determine if the current structure is the most efficient way to grow the visitor

economy in a sustainable way or, if not, how best to achieve that outcome.

Ideally it would develop a clear delineation of responsibility across each

segment and organisation within the ecosystem.

An indicative responsibility framework to consider could be:

Role and Responsibilities	Yarra Ranges Tourism/VEP	Local Councils	Industry Associations	Tourism & Business Associations
Vision / Purpose				
Key roles				
Governance structure				
Marketing				
Communications				
Industry development				
Product development				
Implementing recommendations from DMP				
Events				
Advocacy				
Available resources				
Investment attraction & Policy facilitation				
Other key areas not detailed above				

Organisations	Conceptual Roles for the YVDR Visitor Economy
Government Dept – DJSI, DEECA, Planning etc	To provide support to and grow the availability, quality and location of tourism products and experiences in the state through policy and regulatory reform, funding grants and investment, and opening access to appropriate land and nature-based resources.
Government Tourism Bodies – Visit Victoria, Tourism Australia	To drive visitation and expenditure through destination marketing (international, interstate and intrastate) and develop a supply of major, regional and business events to support the state and its regional visitor economies.
Councils	To provide support to and grow the availability, quality and location of tourism products and experiences in the YVDR through statutory planning, workforce policy, funding and investment in regional infrastructure.
Yarra Ranges Tourism/VEP	To be the peak advocacy, marketing and industry development body for the YVDR visitor economy. To work in partnership with all stakeholders to be the voice of the YVDR and lead the marketing and industry development for region's visitor economy.
Industry Associations	To partner with YRT in respect of their members activities that involve the visitor economy and provide advice to YRT on how best to market and promote their industries.
Local Tourism and Business Associations	To work with the local business in their region to encourage participation in key regional marketing activities and products and industry development. To be an advocate for their region and ensure delivery of the LAP for that region. Undertake local events.
Traditional Owner organisations	To collaborate to develop First Peoples tourism experiences in the region in a sustainable manner and to raise awareness of First Peoples history and culture.

It must be noted that streamlining the roles, responsibilities and funding of the organisations based in the YVDR to reduce the duplication and inefficient use of resources can only be achieved with the goodwill of all organisations involved.

Funding

As lead agency for the development of the DMP, YRT will play a key role in its implementation.

This raises the issues of funding for YRT. At present, YRT is funded through a variety of sources being:

- State Government specific grants
- State Government discretionary grants
- Local councils
- Commercial partners and
- Partners.

A significant proportion of this funding is determined on an annual basis and, as a consequence, it is difficult for YRT to undertake long-term projects with the lack of certainty as to its capacity and ongoing resource availability. The implementation of this DMP is an example where YRT should have a significant role, but currently has only limited guaranteed funding beyond the next financial year.

For YRT to be able to operate more strategically, it clearly needs better certainty of its funding. Ideally this would be through commitments from the core funding partners for the next three to five years. It would be good governance to identify key result areas as part of that funding. Additional funding may be required to implement actions from the DMP.

Once the State Government has provided further clarity around the VEP model, we recommend that a longer-term funding arrangement be considered from all relevant agencies.

Clarifying the roles and responsibilities of each of the organisations that receives council funding may also help council to determine the most efficient use of its resources over the longer term.



Action items – product priorities

Governance & Leadership

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Governance & Leadership	1. Ensure clarity of roles and responsibilities for local government, local tourism associations, chambers of commerce and industry stakeholders in relation to delivery of the DMP actions.		✓		Industry, Local Councils, LTAs	S
	2. Facilitate industry and partner workshops and collaboration opportunities to assist in delivery of the DMP.	✓			Industry, Local Councils, LTAs	S
	3. Identify funding opportunities to support growth of tourism in the region.	✓			Local Councils, Industry	S
	4. Work with State government, particularly Visit Victoria and DJSIR to identify joint opportunities to deliver visitation opportunities for the region including multiculturalism, overseas students and VFR.		✓		Local Councils, Visit Victoria, DJSIR	S
	5. Facilitate the creation and implementation of a specific tourism business mentoring program that identifies best practice and common business issues for the industry.		✓		Local Councils, Industry	S
	6. Facilitate networking, collaboration and partnerships between businesses and government.	✓			Local Councils, DJSIR, Land Managers	S
	7. Monitor development pipeline and advocate for investment in gaps within DMP priority areas.		✓		Local Councils, Industry	M
	8. Consider seeking Eco Destination certification from Ecotourism Australia as it sets criteria for a sustainable region.			✓	Local Councils, Industry	M
	9. Encourage and support local products and experiences to seek Eco Product/ Accommodation accreditation through EcoTourism Australia or at least utilisation of the Strive for Sustainability toolkit.	✓			Industry	M

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability

UNSDG impacted



STRATEGIC PRIORITY 6B

Advocacy: One voice, one message for sustainable tourism

VISION

The region's various communities will come together to advocate for government investment and policy development that will benefit both residents and visitors. By prioritising emerging issues and reaching agreement among stakeholders, the region will be well-equipped to meet the needs of all who call it home or come to visit.

Overview

Gaining investment and political change to deliver sustainable tourism to the region will require significant and tireless advocacy. That's why a robust advocacy program that commits all tourism groups to a "one voice, one message" view on issues is crucial for the region to deliver its tourism vision.

State of play

The region is broad in both its tourism offerings (products and experiences) and geographic diversity. This means there are a number of industry and community organisations that have a valid remit in respect of the YVDR's visitor economy.

These stakeholders include: the regional tourism group, YRT; local tourism groups; industry groups (food, wine, large, small etc); business and community groups; and the four councils.

To deliver on the objectives of this DMP, all groups must be clear about their roles and responsibilities. This will maximise efficiencies, avoid mixed messaging and give the region the best chance to successfully advocate for positive changes that deliver a sustainable YVDR visitor economy.

As part of the development of this DMP, a Project Steering Committee (PSC) was set up under the auspices of YRT. The PSC is made up of representatives from several of these industry and community groups, councils and YRT who together have created this DMP, which has a shared vision with agreed underlying actions.

The majority of the DMP actions are outside the roles and responsibilities of any single organisation and indeed beyond the collective members of the PSC. This is particularly the case in respect to the need for investment for infrastructure, statutory or regulatory

change (eg, planning) or a new state or federal government focus (eg, transport). This again highlights the need for a cohesive and streamlined approach to advocacy.

Nullumbik and Cardinia Shire Councils currently have advocacy plans, while Yarra Ranges and Manningham Councils are working on the development of one. However, there is no formal regional voice to provide input to local advocacy to these plans.

What the region needs

An advocacy program that focusses on whole of region tourism is required. This will help to create efficiencies between stakeholders and align stakeholder messaging when advocating to government, statutory bodies and investors. All groups need to work with an agreed set of actions and initiatives to manage and grow the YVDR visitor economy in a sustainable way.

The region also needs a tourism focussed advocacy plan, and this plan should influence individual council's advocacy plans.

How this will be achieved

One voice which government at all levels recognises to be the "voice of" and "source of truth" for the region. Given the funding for this DMP has come through YRT, it will clearly need to play a lead role and it makes sense for advocacy to sit under its auspice.

One message which aligns all stakeholders to the same message on each individual initiative or action.

Creation of an Advocacy Committee

It's highly recommended that an Advocacy Committee be created in a similar structure to the PSC. This will facilitate the development of both "one voice" and "one message" for the industry.

As detailed in the actions listed under the Governance and Leadership sections in this DMP, a clear delineation of the roles and responsibilities for each group needs to be developed and, where appropriate, consolidated to remove duplication and maximise the efficient use of the limited available resources.



Action items – product priorities

Advocacy

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Advocacy	1. Establish a regional advocacy advisory group of influential people to support YRT advocacy of priority investments in priority projects and policy reform.	✓			Local Councils	S
	2. YRT to coordinate and support advocacy for key projects identified in DMP.	✓			Local Councils, Industry	S
	3. With support of local government and industry, develop a regional advocacy plan to drive priority investment in the region.		✓		Local Councils, Industry	M
	4. YRT to advocate to the Victorian Government the unique risks and challenges in this region with expected loss of social license without specific policy and funding support to mitigate them.		✓		Local Councils, Industry	S
	5. YRT to work with LGA and industry to create opportunities for ministers and key political influencers to visit region and be briefed on key issues.	✓			Local Councils, Industry	S
	6. YRT to advocate to the government for changes to provisions that can enable a more competitive insurance market for tourism operators. Work with other industry associations on strategies to improve insurance market conditions through policy options, affordability and overall sustainability.			✓	State Government, Industry Associations, Local Councils, Industry Operators	S

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability

UNSDG impacted





STRATEGIC PRIORITY 7

Marketing & Distribution: Changing visitor travel behaviour

VISION

The vision is to provide seamless access to information and resources for visitors to the region, driving awareness and assisting with holiday planning, as well as encouraging the right target visitors to explore and discover all that the region has to offer. Support and training will be provided to businesses to help them better market their products and services to visitors and to increase awareness of unique experiences among high-value international and interstate visitors. Collaboration on activities and initiatives will make the most of limited budgets and achieve the goal of creating a thriving, sustainable visitor economy in the region.

Overview

Marketing is a key enabler to drive the demand for visitors to want to travel to the region. Currently the YVDR region is primarily marketed by YRT, while it intergrates with the extension role for statewide visitation and national visitation that Visit Victoria and Tourism Australia, play respectively. Locally there is an ongoing overlap of some marketing related activities. Some examples of this include such things as maps for things to see and do in the region being produced by multiple organisations rather than centrally. Further, marketing and promotion of events run by trader groups or councils is not always aligned to broader activities in the region. This is diluting the messaging and reach that could be achieved with a more unified approach. During the consultation for this DMP, it was evident that marketing activities do not always have a regional focus but are more individualised. This was evident in festivals that were occurring in the region which did not have a broader regional focus or integration to complimentary product opportunities. This may at times contribute to lesser awareness about other attractions and experiences, and result in less time spent in the region and more day trips with single stops. With the state's highest proportion of day trips to overnight visitors and a predominant focus on weekend visitation, one of the key challenges for the YVDR is to identify the right target customer that will help to create the shift in current visitor travel behaviour.

State of play

Visitors

Economic research utilising TRA data establishes that pre-COVID-19 (prior to March 2020) the location origin and age of main visitors to the Yarra Ranges were as follows.

Domestic holiday visitor nights by origin

Origin	% share
Melbourne	56% = 266k
Regional Victoria	25% = 118k
NSW	8% = 40k
QLD	4% = 18k
SA	2% = 9k
ACT	2% = 9k

Domestic holiday visitor nights by age

Age	% share
20-29	16%
30-39	22%
40-49	22%
50 plus	40%

Household income and spending per domestic visitor night

Income	Spending per domestic visitor night
Under \$70k	\$136
\$70k - \$150k	\$204
\$150k - \$200k	\$250
\$200k +	\$296

Pleasingly, these demographics show that there is already a core share of the current market of people who can potentially meet the objectives of:

- mid-week travel
- stay overnight, and
- outside school holidays.

Some 40% of the current domestic visitors are aged over 50 and 16% aged under 29. These age groups are less likely to have school-aged children. The over 50 segment will also include a share who have retired or semi-retired, meaning they have more flexibility to embark on mid-week travel. However, there will be some who for financial reasons may be more reluctant to stay overnight.

Importantly 16% also come from interstate and may also have more ability to come mid-week.

It's also worth noting the impact that the region has on the broader Victorian visitor economy. TRA data reveals that there is a significant number of international visitors visiting the three key attractions in the region (19%), but they are staying outside the region.

Marketing approach

YRT primarily markets the region through owned media channels, such as the series of Visit Yarra Valley and Dandenong Ranges websites, social channels and databases, with a focus on industry partner products and experiences, within the region and surrounds. Industry partnership with YRT is based on a pay to participate model that allows local businesses to leverage government investment in regional tourism. This is being done with a limited budget for the advertising needed to raise broad awareness about the travel opportunities. Innovative digital kiosks are being used to provide visitor information at key sites throughout the region. It also works collectively with other regional destinations through the Go Beyond Melbourne touring route. Within this framework it collaborates in partnership with Visit Victoria and Tourism Australia to amplify the regions intrastate, interstate and international positioning.

Industry capability

Through an analysis of online customer reviews, it is evident that the capability of industry to undertake digital marketing activities is mixed. Some businesses have marketing teams dedicated to boosting the profile of the business while others are operating with minimal expertise in this area.

What the region needs

To overcome the core challenges of driving mid-week and overnight visitation and increasing yield across the region, additional funding will be needed to enhance marketing activities in the next 10 years. Influencing consumer behaviour will require a concerted and centralised marketing approach to drive awareness among high value markets about the diverse range of product and experiences available.

Once YRT determines which target markets to invest in, best practice marketing

strategy and related tactics should be developed, and effective advocacy, promotions and digital distribution carried out to help grow that market.

YRT will also need to also understand what the night-time economy looks like for each of these personas in order to refine the product offering in the region.

How this will be achieved

I. Utilising visitor personas

YRT commissioned Customer Frame in September 2022 to undertake an extensive project to create a common set of customer profiles/visitor personas for the YVDR region. This would enable industry to:

- develop a collective and harmonised view of the customer
- enable a clear, consistent and common understanding of the region's tourism customers, beyond demographics alone, and
- help drive deeper customer empathy, find new opportunities and help the region become more resilient from disruption.

Those personas are currently available for YRT partners to use as a partnership benefit. Personas assist those with and without marketing skills in their business to be more consistently targeted with their promotional efforts.

Due to the need to focus on mid-week or overnight visitation, not all the detailed personas will be applicable to driving this change in behaviour. However, in assessing the personas that most apply, consideration has been given to families with young children not yet in school, older travellers (50+) and those interested in a 'workcation' – a new type of traveller since the COVID-19 pandemic who can work away from home or the office. Research has consistently shown that about 30% of the workforce would

consider a workcation. The proximity of YVDR to Melbourne may be the perfect option for this type of travel.

The personas that seem most aligned with the desired travel behaviour of

- mid-week travel
- stay overnight
- outside school holidays, and
- workcation

are the growth persona profiles of

- "Betty & Howard" – the go-getting retirees
- "Gregg & Sophie" – the couple that splash the cash
- "Lucas and Melanie" – the wealthy couple living the life, and
- "Steven" – the internationalist.

YRT partners can access those personas at <https://www.visityarra.com.au/yarrarangestourism/partners-portal/customer-personas-for-our-region>

Wine Yarra Valley has also its own visitor personas and one of those groups – Authentic Explorer – is consistent with the over 50-year-old personas.

It is also worth noting that the Lifestyle Leader market is a focus for Visit Victoria and strongly aligns to Tourism Australia's High Value Traveller (HVT) audience.

YRT continues to be well placed to collaborate with both Visit Victoria and Tourism Australia on statewide and national demand driving tourism strategies.

While it is expected that there will be a core reliance on the existing foundational customer profiles identified for visitation, there will be a need to target marketing activities towards some key customer profiles. The development of products and experiences in line with these customer profiles will also need to be a strong consideration for future activities by industry in the region.



2. Investment in marketing campaigns

There is a fundamental need for further investment in marketing campaigns for YVDR to help establish the region's brand and awareness in these three key markets:

1. International (high value visitors more likely to visit mid-week)
2. Interstate (opportunity for further holiday visitation)
3. Melbourne (more than a weekend day trip)

YVDR plays a critical role in the broader Victorian visitor economy as previously outlined. This should be leveraged to target investment from state bodies and support the bounce back from the impacts that COVID-19 has had on the region, which was one of the worst impacted.



Growth Profiles
Higher propensity to visit mid-week or overnight

More detail on these customer profiles are available from YRT

Meet Betty + Howard: the go-getting retirees			
BACKGROUND	THE FACTS	GOALS	FRUSTRATIONS
<ul style="list-style-type: none"> Retired couple High income Travel enthusiasts Interested in local history and culture Value quality experiences 	<ul style="list-style-type: none"> Age 65-75 High net worth Travel 2-3 times per year Interested in local history and culture Value quality experiences 	<ul style="list-style-type: none"> Seek out unique experiences Interested in local history and culture Value quality experiences Interested in local history and culture 	<ul style="list-style-type: none"> Seek out unique experiences Interested in local history and culture Value quality experiences Interested in local history and culture

Meet Gregg + Sophia: the couple that splash the cash			
BACKGROUND	THE FACTS	GOALS	FRUSTRATIONS
<ul style="list-style-type: none"> Young professionals High income Travel enthusiasts Interested in local history and culture Value quality experiences 	<ul style="list-style-type: none"> Age 30-40 High net worth Travel 2-3 times per year Interested in local history and culture Value quality experiences 	<ul style="list-style-type: none"> Seek out unique experiences Interested in local history and culture Value quality experiences Interested in local history and culture 	<ul style="list-style-type: none"> Seek out unique experiences Interested in local history and culture Value quality experiences Interested in local history and culture

Meet Luca + Melanie: the wealthy couple living life			
BACKGROUND	THE FACTS	GOALS	FRUSTRATIONS
<ul style="list-style-type: none"> Young professionals High income Travel enthusiasts Interested in local history and culture Value quality experiences 	<ul style="list-style-type: none"> Age 30-40 High net worth Travel 2-3 times per year Interested in local history and culture Value quality experiences 	<ul style="list-style-type: none"> Seek out unique experiences Interested in local history and culture Value quality experiences Interested in local history and culture 	<ul style="list-style-type: none"> Seek out unique experiences Interested in local history and culture Value quality experiences Interested in local history and culture

Meet Steven: The aspirational internationalist			
BACKGROUND	THE FACTS	GOALS	FRUSTRATIONS
<ul style="list-style-type: none"> Young professional High income Travel enthusiast Interested in local history and culture Value quality experiences 	<ul style="list-style-type: none"> Age 25-35 High net worth Travel 2-3 times per year Interested in local history and culture Value quality experiences 	<ul style="list-style-type: none"> Seek out unique experiences Interested in local history and culture Value quality experiences Interested in local history and culture 	<ul style="list-style-type: none"> Seek out unique experiences Interested in local history and culture Value quality experiences Interested in local history and culture

In conjunction with YRT's personas it is important to note that Visit Victoria also has personas which underpins Visit Victoria's drive and fly marketing campaign activities. Work will need to be undertaken to identify how these personas could be used to inform industry in building their products and services for the region.

In conjunction with these campaigns a concerted industry-wide regional effort to establish familiarisation activities with journalists, bloggers and influencers should be prioritised to drive earned media opportunities. This should also be broadened to consider the engagement of hotel concierges across neighbouring areas and into the city of Melbourne. This could be through themed activities and should ensure industry collaboration, particularly with existing familiarisation activities taking place, eg, Wine Yarra Valley etc.

3. Industry development and collaboration

With limited resources across the region, it is important to ensure that a broad regional approach to marketing is implemented. YRT plays a critical role in facilitating this activity and has an established Marketing Sub-Committee attempting to tackle this issue. As part of this DMP, a review of roles and responsibilities of organisations in the visitor economy has been suggested and this will include marketing activities. Further to this, additional activity needs to be coordinated around the provision of visitor information and signage throughout the region to encourage dispersal. With the visiting friends and relatives (VFR) market a strong driver of visitation, it is also important that local councils are heavily engaged in marketing the key visitor attractions and experiences that are on offer at a local level and annual council surveys should be used to track awareness. This has been done at Nillumbik Shire Council in the past.

Collaboration across the major events in the region can also be addressed to deliver cross promotion of complementary experiences, food and drink opportunities and the like to encourage multiple visits and longer stays through ticket bundles and other marketing tactics. These collaborations should ideally focus on the opportunities for mid-week and overnight activities if appropriate.

A key part to collaboration across the tourism industry is engaging businesses around best practice activities and upskilling staff. The Workforce Plan identifies a number of training

opportunities with the support of councils, YRT and industry. These workshops and activities should focus on core marketing skills that will help to lift demand and improve the visitor experience.

4. Eligibility for funding

As noted above, the YVDR visitor economy was one of the region's most heavily impacted by COVID-19.

One of the reasons YVDR was impacted more than other regions was because it was caught up in the greater Melbourne lockdowns. It was therefore not eligible for much of the visitor economy recovery funding that was made available to broader regional Victoria.

This is a continuing issue for YRT, as the YVDR region is not eligible for funding that other tourism regions designated to be outside the greater Melbourne area can access. For example, a marketing initiative or infrastructure grant request proposed by YRT that drives positive outcomes for the YVDR may be rejected solely because of the location of the region, whilst it would be eligible in another region further away from Melbourne.

Advocacy will be required to identify the need for the YVDR region to be treated as a general regional area rather than as a subset of Melbourne.

5. Marketing tools

There are some important marketing tools that will help effectively manage the visitor demand that is driven by this DMP's marketing activities.

Social media and email

communication: Investing in the technology stack that YRT can leverage to promote the region and communicate directly with visitors will be important to ensure a cost effective approach to marketing activities. These tools are core to ensuring that YRT can effectively promote the region and with the speed of development in this area investment is recommended to augment and enhance the existing tools available.

Website: YRT's suite of websites need to be set up to broadly promote the region and should

become known as the place to go for visitors when planning and building out their experiences in the region. Building upon the suite of websites and content that currently exists should see the visitor provided with a consolidated tool that encompasses the promotion of attractions and experiences, builds itineraries, highlights accessibility, provides mapping, details provenance of goods, opening hours and attraction options.

Subject to budget, consideration could also be given to including a booking channel on the website creating a one stop shop. Commission would need to be charged, but if these are set at lower rates than on other aggregator sites, such as Booking.com, that barrier may be diminished. The use of API technology has made this more achievable and affordable than in the past. It will still take significant time and money and, as such, should be considered a lower priority. However, such a model may be of interest and relevance to Visit Victoria if it could develop a whole of state solution with benefits passed back to the regions.

The Hunter Valley has a website that incorporates some of these aspects with www.winecountry.com.au providing an opportunity for people to explore the potential attractions and experiences, view accommodation, look at guided tours on offer in the region and also to book some of the product on offer.

Destination pass:

The development of a regional Destination Pass could be a key tool to drive visitation to mid-week and overnight and is an opportunity for YRT to bring together the industry around a mid-week campaign. There are many examples of this type of pass across the world which YRT should investigate for the region. The regional Destination Pass may include discounts for internal transport and parking, bundling access to attractions and experiences, accommodation, food and drink, and other benefits supported by industry. Discounts are only one component of a successful destination pass and bespoke

and unique opportunities, such as meet the maker, celebrity tourism opportunities and other “money-can’t-buy” experiences, should be

considered when developing this product. YRT will be in a position to generate revenue from such an undertaking and can use this

to reinvest into industry initiatives outlined in this DMP.

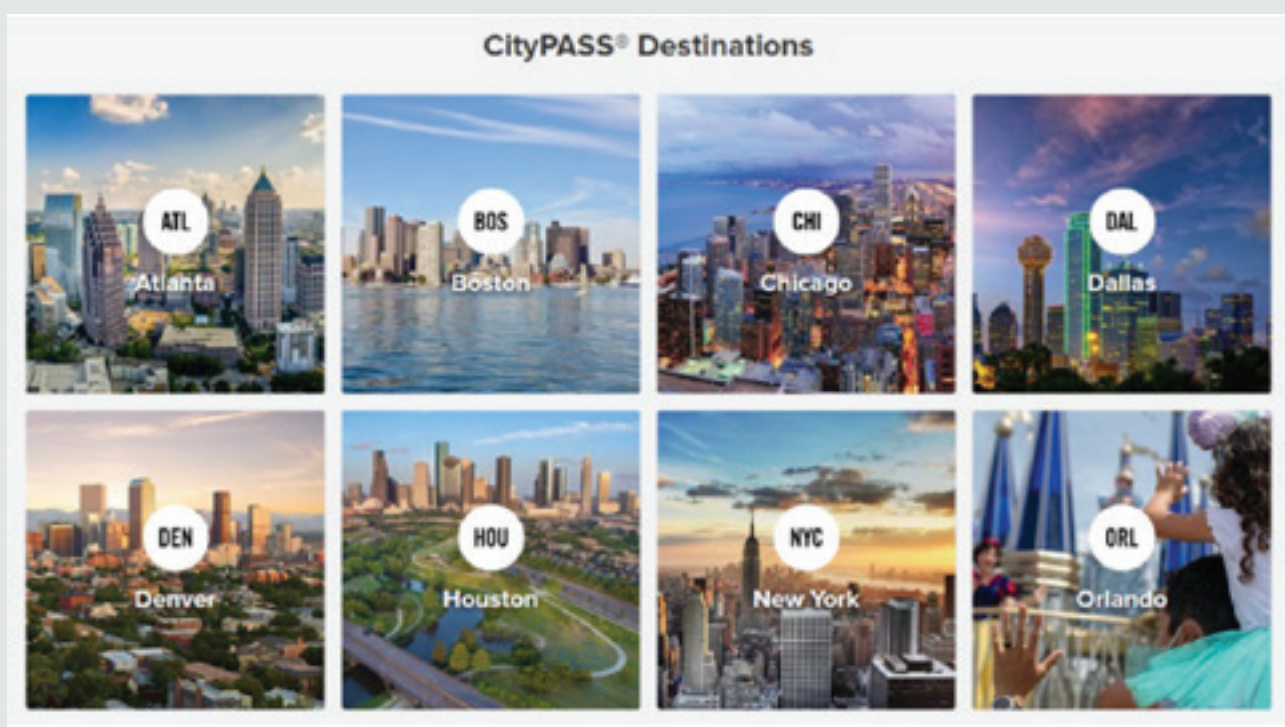
Imagery and focus

Overwhelmingly visitors and residents reference the region’s natural beauty as a key attribute of the region. It is therefore necessary that imagery used to promote the region showcases the bountiful natural attractions and green spaces.

DESTINATION PASS EXAMPLES:

CITYPASS

Discount access to a range of attractions in various cities across the USA.



THE WINE PASS

Priority Wine Pass is a membership program that helps elevate your wine tasting experience. It provides the best discounts in the most popular wine regions across the US. Our discounts include those at hand-picked wineries, wine bars, hotels, restaurants and transportation companies. We also provide concierge-type service for our members for personalised wine tasting recommendations based on what they like.

<https://prioritywinepass.com/learn-more/ref/162/?campaign=VP-WineCountryPass>

How Priority Wine Pass Works

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Action items – product priorities

Marketing and Distribution

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Marketing & Distribution	1. Advocate for investment in marketing for the region to solidify destination branding and key marketing campaigns to be delivered into Melbourne, interstate and possibly international markets. The Future of Tourism Demand produced by Tourism Australia should be utilised to help determine target inbound markets.			✓	Local Councils, Visit Victoria, Industry	S
	2. Audit key visitor sites to identify wayfinding and other marketing assets that can be used to aid dispersal across the region.	✓			Local Councils	M
	3. Enhance existing activities across industry to develop an ongoing series of regional familiarisation tours and press trips for travel writers, bloggers, and influencers to generate positive publicity and reviews and showcase new or improved product in the region.		✓		Wine Yarra Valley, LTAs, other Industry partners	S
	4. Work with Economic Development departments at local Councils to enhance existing workshops for industry to improve marketing capabilities in the tourism industry with a focus on online tools.		✓		Local Councils	S
	5. Further promote YRT's mid-week visitation campaign and broaden the engagement with industry and Local Tourism Associations.	✓			Industry, Local Councils, LTAs	M
	6. Develop concierge familiarisation program across accommodation operators (including surrounding area and Melbourne based hotel operators) to ensure awareness of visitation opportunities in the region.	✓			Industry	S
	7. Implement collaboration through major events in the region to promote the possibilities of multi-stop and multi-night activities. This can include ticketing partnerships with attractions and local businesses, parking incentives, dynamic pricing to encourage mid-week and overnight visitation.	✓			Industry, Local Councils, LTAs	S
	8. Maintain a progressive position in considering new technologies for promoting visitation and virtual experiences.	✓			Industry	S
	9. Maintain a reliable and comprehensive website or platform that enables visitors to easily find information about accessibility, provenance, hours of opening and attraction options with mapping and booking capabilities. This will allow for cross promotion opportunities and building of multi day or multi stop itineraries.	✓			Industry	M
	10. YRT to explore the development of a mid-week Destination pass – providing discounts for visitors who stay in the region mid-week compared to visitors on weekends who pay premium prices.	✓			Industry, Local Councils, LTAs	S
	11. YRT to leverage ongoing partnership activity for intrastate, interstate and international marketing and promotion with Visit Victoria and Tourism Australia. Supported by clear outcomes for the YVDR.		✓		Industry, Visit Victoria, Tourism Australia	S

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability

UNSDG impacted





STRATEGIC PRIORITY 8

Sustainable workforce: Growing the region's capabilities for the future

VISION

The vision is to proactively address the challenges of workforce management in response to the changing global and local trends in tourism and workforce participation, including the impact of COVID-19. The region will embrace the unique challenges posed by its location and address the need for a stronger mid-week and night-time economy to cater to the disproportionate level of day trip and weekend visitation. Through collaboration and innovation, the region will create a resilient and adaptable workforce that supports the continued sustainable growth of the visitor economy.

Overview

There is currently a shortage of labour to support the needs of the visitor economy. Part of this shortage has been caused by the lingering impact of COVID-19 on the labour market. Yet as the visitor economy grows, so too will the need for a larger workforce.

It's clear that without a sustainable and suitable workforce development strategy, the tourism industry will not be able to fulfil its potential in the region.

A Workforce Plan was developed as part of this DMP. The plan aims to support and facilitate the current and future tourism and hospitality workforce – both its capability and capacity – in the YVDR for the next 10 years.

The plan identified an opportunity to secure a wider range of workers than has traditionally been employed in the industry, and also to redefine workforce-related skills training, recruitment, transport and accommodation.

State of play

As highlighted in the stakeholder consultations, labour supply is a burning issue for many, if not most, YVDR tourism businesses. This reflects the loss of many staff to other industries due to COVID-19 impacts. These impacts were much more severe in the tourism industry than in other sectors.

Furthermore, these factors were more pronounced in the YVDR than in other areas of regional Victoria, due to YVDR being included in Melbourne lockdowns.

Staff shortages in general have resulted in a shift in power in the employer/employee relationship in favour of employees. Wages have increased, and more supportive and flexible conditions are being offered, increasing costs for employers. Employers have incurred more time and costs for recruiting and training because they often prefer to hire based on best-fit character and personality rather than qualifications and credentials.

A 'minimalistic' approach to training and education – on-the-job, short courses, micro credentials and mini online courses – has been adopted for lower-skill jobs.

Staff have also faced increased work pressures from understaffing, while customers have faced declining quality of service.

Notwithstanding these factors, there have been industry improvements, including a reduction in wage theft and other underpayments. A return of international students and a slow return from Work-From-Home options is slowly easing these challenges. Similarly, it has now become a more accepted practice to charge public holiday surcharges to visitors to support paying appropriate

penalty rates.

However, a shortage of affordable accommodation and poor public transport to and through the YVDR, will extend the impact of staff shortages longer than in the Melbourne tourism region. Regions in NSW, such as Byron, have considered 60-day limits on temporary accommodation to ensure suitable options for local workers. <https://www.theguardian.com/australia-news/2023/apr/29/mayors-in-nsw-holiday-hotspots-consider-short-term-rental-caps-after-60-day-limit-proposed>

The region

The range of employment options in the region is diverse, from frontline service roles to knowledge-based workers who require higher levels of educational attainment.

The tourism and hospitality industry provides employment for approximately 7,200 or 7.3% of the region's employment (direct and indirect jobs).

It ranks just behind Construction, Education/Training, Health Care/Social Assistance and Retail Trade as a source of jobs in this region.

Across the four subregions the relevant number of Visitor Economy (VE) jobs now and required for the future include:

Sub-Region	Population Aug 2021 Census	Population Estimate 2032	Visitor Economy Jobs (VE Jobs), Share of Total YVDR Visitor Economy Jobs and Share of Total Area Employment in 2018/19 (pre-COVID-19)s	Estimated # of Jobs in 10 years Without the benefits of DMP delivery
Western Yarra Valley	62,895	66,040 (1%pa)	652 VE Jobs 9% (share YVDR) 4.5% (WYV area jobs)	795 VE Jobs + 143 (cf. 18/19) + 416 (cf. 20/21)
Yarra Valley	73,373	80,710 (1%pa)	2,381 VE Jobs 33% (share YVDR) 10.5% (YV area jobs)	2,905 VE Jobs + 524 (cf. 18/19) + 1,519 (cf. 20/21)
Upper Yarra Valley	16,799	18,479 (1%pa)	1,033 VE Jobs 14% (share YVDR) 30.0% (UYV area jobs)	1,261 VE Jobs + 227 (cf. 18/19) + 659 (cf. 20/21)
Dandenong Ranges	144,429	166,093 (1.5%pa)	3,041 VE Jobs 42% (share YRT) 8.7% (DR area jobs)	3,710 VE Jobs + 669 (cf. 18/19) + 1,940 (cf. 20/21)
Total	340,793	396,259* (1.5%pa)	7,277 VE Jobs 100%** 7.6% (YVDR region jobs)	8,878 VE Jobs + 1,601 (cf. 18/19) + 4,642 (cf. 20/21)

*The balance of the YVDR region population outside of the 4 sub-regions is 64,937 (19%pa)

**The balance of the YVDR region outside of the 4 sub-regions areas has only 170 VE Jobs, 2% of YVDR VE jobs and 1.2% of Balance area jobs.

Sources:

- ODIN360 estimates of population using Victorian Government population by LGA forecasts for 2036
- ODIN360 estimates of visitor economy jobs derived from allocating visitation across the five areas using Tourism Research Australia (TRA) data for 2018/19 beside the last pre-COVID-19 regional satellite account data for the Yarra Valley and Dandenong TRA region
- ODIN360 estimates of visitor economy jobs in 2032, estimated using TRA national forecasts, but with only half the growth in jobs (i.e., 22%) as forecast for real visitor spending to reflect increased hours by existing workers, more day trips rather than more high yield and labour intensive overnight stays and increased labour productivity over the decade.

The first two sub-regions have the larger shares of visitor economy jobs (75% of the VE jobs), but Upper Yarra Valley has the visitor economy with the larger share of total jobs. Western Yarra Valley, which has a more diverse economy, has a lower share of visitor economy jobs.

Business profile

The number of tourism and hospitality businesses with various numbers of staff, by LGAs in the YVDR region, is in the accompanying table. Please note that the Yarra Ranges LGA includes the sub-regions of Yarra Valley, Upper Yarra Valley and part of the Dandenong Ranges. The remainder of the Dandenong Ranges is captured with the Cardinia sub-region.

Staff Employed	Number of Businesses: Yarra Ranges LGA	Number of Businesses: Nillumbik LGA	Number of Businesses: Cardinia LGA
Non-employing	701	317	363
1-4 staff	510	233	275
5-19 staff	242	98	121
+20 staff	59	23	24
Total	1,473	645	774
Employing Businesses	772	328	441

The lasting workforce impacts of COVID-19

The lasting workforce impacts of COVID-19 include, amongst other things:

- The declining reputation of the tourism and hospitality sector.
- Prejudice against ageism diminishing, partly as a consequence of people shortages, coupled with some temporary relief in the increase of earnings of mature aged people without impacting upon their pension entitlements (The Work Bonus Scheme).
- A power shift in the employer/ employee relationship, with a shift towards the employee, and the adoption of more people-friendly management practices by employers (eg, more sociable shift arrangements).
- A changing emphasis on skills with a lack of investment in skills acquisition (ie, a reduced emphasis on qualifications and training as opposed to employing anybody who can do the job). This may enable businesses to survive in the era of people shortages in the short-term, but may result in a longer-term decline in service delivery, which may tarnish the industry's future reputation.

Current workforce challenges

- Transport
- Housing availability (the number 1 challenge to bringing in overseas workers)
- Digital connectivity and access
- Cost pressure
- Sustainability: Fluctuating demand
- Lower socioeconomic status of the region
- Keeping it local

Strengths

- Attractive rural area with a more relaxed lifestyle and natural beauty, closer to nature, yet still relatively close to outer Melbourne suburbs and facilities and the CBD.
- A diversification of attractions to cater for a wide range of interests and hobbies outside work.
- A range of relevant training institutions in or close to the region.

Job profiles

A high percentage of jobs in the tourist and hospitality sector in the region is concentrated in four sectors:

	Pre COVID-19 2018/19		During COVID-19 2020/21	
	# Industry Jobs	%	# Industry Jobs	%
Food & Beverages	3,486	43%	2,554	60%
Accommodation	731	10%	299	7%
Retail	1,186	16%	670	15%
Education	785	11%	2	0%
Total Jobs	7,277	80%	4,236	82%

Job losses were incurred mainly in the food & beverages and education areas (with no international students).

It is likely that this same mix of job types pre-COVID-19 will be projected into the future (ie, the next 10 years), so this future demand will be dominated by food and beverage services. That said, there will be a growth in employment, in wellbeing, leisure, adventure and nature-based activities, but nevertheless from a low base.

Skill profiles

Lower skill jobs:

Approximately 70% of jobs in the tourism and hospitality industry in the YRDR are concentrated in three sectors:

- Food and beverage services: front-line service roles, including bars and cafes (waiters and bar attendants)

- Accommodation: housekeeping
- Retail: shop assistants, service staff

Skilled or semi-skilled jobs:

These jobs include:

- Chefs, cooks (these roles are much sought after, particularly fine dining chefs)
- Middle management and supervisor roles

Specialist skills jobs:

These jobs include:

- Train drivers, fine-dining chefs, sommeliers, vets

Typically, there is a longer initial training or familiarisation time required for adequate performance. Some staff are sourced from outside of the region, with longer travel times to and from work.



Estimating the future demand for jobs

The demand for jobs in the region's tourism and hospitality sector has been calculated and projected to understand

workforce needs by 2032. This calculation has been made using input-output modelling and data on proportional tourist spending. For each dollar predicted to be spent, the industry that

this spending will flow to, and therefore the employment inferred by that spending, has been calculated.

Source of Tourism and Hospitality Workers	Number of Estimated Workers Available 2023	Number of Estimated Workers Required 2023	Number of Estimated Workers Available 2032	Number of Estimated Workers Required 2032
Established local supply	4,000	4,000	4,600	4,600 (in line with population growth)
Working holiday makers and international students	1,000	1,000	1,000	2,000
Other under-utilised sources potentially available		3,456		4,498
- Mature aged workforce (half 55-75 year old locals)	37,000		50,000 (aging workforce)	
- Parents (young mothers/fathers in one income households)	7,000		8,000 (in line with population growth)	
Total	49,000	8,456 (for 6,765 positions)	64,600	11,098 (for 8,878 positions)

The above estimates assume a 25% turnover of the workforce for the industry (ie, with the estimated worker requirement in excess of available jobs).

There still may be shortages in medium to higher-level skilled jobs.

What the region needs

A dedicated Workforce Plan (provided as part of this DMP) which helps the region to boost the number of workers in the tourism industry, recruit workers with adequate skills, training and experience, and support businesses to implement training where needed.

How this will be achieved

Implementing this DMP's Workforce Plan will help meet the region's tourism industry workforce needs for the next 10 years. The plan's key recommendations include:

1. Source staff from under-utilised segments

- Promote the opportunities available in the region to engage the under-utilised segments of the community, including older residents, younger mothers and fathers, unemployed youth and First Nations people.
- Support a public education program, in conjunction with councils, aimed at promoting the benefits of employing more mature aged workers, including showcasing success stories from employers and favourable testimonials from individual workers, and encourage more mature aged residents to consider working in the industry. This program could also include specialised job matching for interested local older residents.
- Encourage examples of pathways to transition for older workers or workers wishing to change careers. This could include career advice from organisations such as the Job Skills Centre at Box Hill Institute.

- Target the fast-returning international students and new migrants that may be settling in the region for tourism roles.
- Promote workforce diversity, including highlighting examples of those businesses in the region that have successfully integrated a workforce that includes a heterogeneous mix of skills, knowledge and experiences.

2. Deliver skills – both to management and their workers

- Support grassroots, community-based career training that integrates tourism as a valuable aspect of the community, increasing the social license of the industry.
- Continue to collaborate with and support local councils, and in particular Yarra Ranges Council, in their application for the wider region to be approved for the importation of specialised skilled occupations under a Destination Area Migrant Agreement.

- Continue to connect relevant stakeholders and businesses to ensure that cross-regional and cross-industry opportunities and needs are understood and met.
- Continue to support and contribute to building a training and skills ecosystem that ensures all key skills needed for a thriving tourism industry are provided to employees who need it.
- Continue to support businesses in their people management practices, including recruitment, engagement, retention, career development, and coaching and mentoring staff.
- Provide greater assistance to business to:
 - recruit more mature aged prospective workers and
 - retain staff.

3. Recruit and retain a local workforce

- Support a workforce that lives and works in the local community.
- Encourage more workers to stay and work locally by partnering with community and industry to encourage migrant flows and local

employment. In particular, continue to support the Yarra Ranges Shire with its Employment Awareness and Retention Scheme.

- Advocate for improved low-cost housing availability in the community, emphasising the community and industry benefits to living and working in the region.
- Advocate for improved transport in the region, including transport beyond the three terminating rail stations.
- Advocate for improved services (including internet services) to the region.
- Continue to support those programs aimed at underemployed youth (Job Ready Program through BHI, CIRE Jump for Start Program). Working in or on their own Country is also particularly appealing for members of Traditional Owner groups.
- Continue to support those schemes aimed at addressing specialist skills deficiencies (ie, DAM Agreement).
- Support a focus on retention, including the cost of turnover; notwithstanding the higher turnover typically experienced in the industry.

4. Promote career development

- Promote career development in the region where employment in the industry is not seen as just a job, but a career. Include examples of those who have fostered a successful career path.
- Continue to engage with education and training institutions, stakeholders and residents, to ensure relevant training and career development pathways exist.
- Develop and showcase a diverse set of career pathways and training (based on local successes), to support the whole industry – from specialists to entry-level opportunities and everything in between.
- Build the capability of businesses to support career development opportunities and strengthen the region’s workforce capability.

5. Role of YRT

- Identify opportunities for collaboration and influence and consider becoming a clearing house of best practise across the YVDR
- Keep abreast of industry innovation and technology
- Promote working in the region and the industry



Photo: Visit Victoria

Action items – product priorities

Sustainable Workforce

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Sustainable Workforce	1. YRT to support Councils to champion visitor economy employment of locals, to help protect social license and enrich the visitors experience of the destination.			✓	Local Councils, Industry	S
	2. YRT to work with Councils and property owners/investors to develop specific worker accommodation to support the visitor economy with consideration given to Housing Strategies.			✓	Local Councils	M
	3. Address existing and emerging issues regarding access, career transition, attraction, and retention of a local workforce.			✓	Local Councils	M
	4. Ensure Workforce infrastructure is considered in Council planning which includes transport, housing stock (seasonal and permanent) and digital connectivity.			✓	Local Councils	L
	5. Attract older workers to consider the visitor economy as a viable lifestyle employer.		✓		Local Councils, Industry	S
	6. Create skills opportunities and workshops for the tourism industry that provide training on cultural awareness and engages Traditional Owner groups.	✓			Local Councils, Industry, Traditional owners	M
	7. Create series of workshops with industry to share best practice activities in relation to workforce recruitment, retention and upskilling.	✓			Local Councils, Industry	S
	8. Develop a pilot program to pool businesses and share workers currently engaged on part time or limited hours due to the heavy focus on weekend visitation.	✓			Local Councils, Industry	M
	9. Investigate and resolve barriers to facilitate the establishment of a night-time economy for YVDR that encourages attraction and retention of younger workers.		✓		Local Councils, Industry	M
	10. Partner with local Councils to provide training for industry skills, from low-skill jobs, to medium-skill level, to specialist skill levels jobs targeting key workforce markets.		✓		Local Councils	S
	11. Continue to support and contribute to building a training and skills ecosystem that ensures all key skills needed for a thriving tourism industry are provided to employees who need it.		✓		Local Councils, Industry	S
	12. Promote free TAFE courses related to the tourism industry that have recently been opened up.	✓			Local Councils, Industry	S
	13. Adopt a leadership position for workforce best practice as well as being an advocate for workplace issues.	✓			Local Councils, Industry	S

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability



Section C: Cultural sustainability

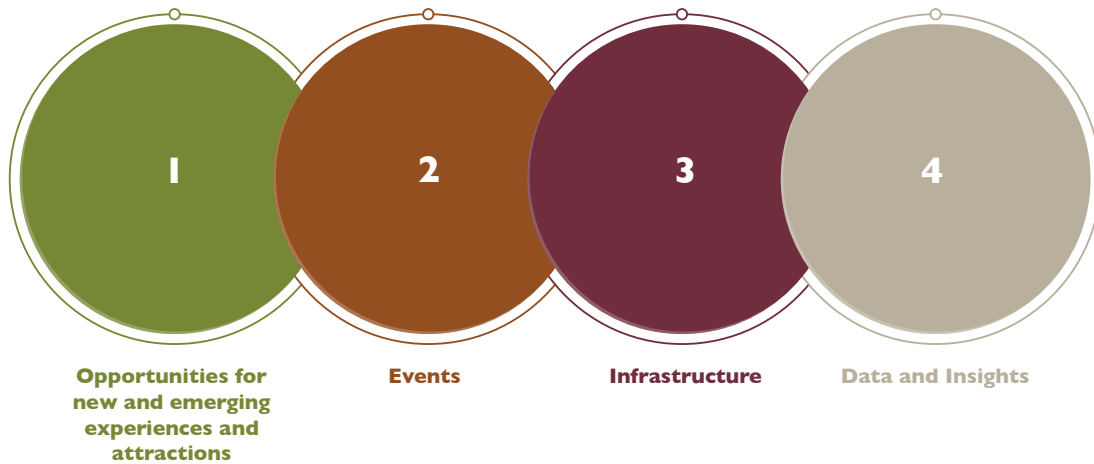
UNSDG impacted



5d. Additional Regional Initiatives

In addition to the eight strategic priorities above there are a number of additional regional initiatives that also need to be addressed to maximise the benefit of this DMP for the region. Whilst not necessarily “game changing” to the visitor economy across the entire YVDR, they are important and should not be discounted in the implementation of the DMP. They are required to both grow the “business as usual” elements but also highlight potential new emerging opportunities that could evolve over the 10 years of the DMP.

They are:



1.

Opportunities for new and emerging experiences and attractions

These opportunities not only seek to develop new emerging areas, such as wellness tourism, but also to ensure the development and continued improvement of current attractions (including some of the hero experiences).

IA:

Wellness: Broadening the region’s appeal & economy

Capitalising on the emerging trend of wellness travel by leveraging the area’s natural attributes will attract higher-yield visitors and establish the region as a premier destination for wellness travel, providing opportunities for growth and economic development.

IB:

Tours & Attractions: Developing new itineraries while supporting industry icons

Developing new multi-stop, multi-day, mid-week and night tours is needed to encourage longer stays and shift visitation away from weekends whilst the region continues to support and invest in the current hero experiences and industry icons across the region.

IC:

Arts, Culture and Heritage: A new regional approach

The YVDR region can collaborate to increase awareness about the arts, culture and heritage experiences that currently exist and work together to identify opportunities for growing future visitation through collaboration with other similar arts and culture experiences across the region and the state.

2.

Events: Showcasing the Naturally Impressive YVDR

Whilst a number of key events were highlighted in the strategic priorities, a broader event plan should be developed to capture more regional and local event opportunities across the entire region. A new calendar of sustainable events should be developed that highlights the region’s core attributes and product strengths and encourages overnight visitation and more diverse experiences.

3.

Infrastructure: Investing for a sustainable future

Clearly identifying the new infrastructure needs and detailing them in a YVDR regional investment prospectus for tourism will be key to success. Reinvesting in current infrastructure will also ensure that the region can deliver meaningful and sustainable visitor experiences.

4.

Data & Insights: For an informed future

Establish a centralised resource for data and insights that will empower stakeholders to make informed decisions that drive positive outcomes for the region. This resource will bridge the gap in data and provide valuable insights to help the region thrive. The tourism industry has been an increasing supply of data, largely from the digitisation of tracking and spend data, as well as meta data from online search behaviour. Yet this data is still quite expensive and often raw with few insights and needs interpretation.



ADDITIONAL REGIONAL INITIATIVE I

Opportunities for new and emerging experiences and attractions

ADDITIONAL REGIONAL INITIATIVE IA

Wellness: Broadening the region’s appeal & economy

VISION

The vision is to capitalise on the emerging trend of wellness travel in the region by leveraging the area’s natural attributes and complementing them with existing products. With a world-leading wellness operator coming to the region, the region is well positioned to offer multi-dimensional wellness activities, including Sleep, Eat, Spa, Move, Mindfulness, and Grow. By doing so, we will attract higher-yield visitors and establish the region as a premier destination for wellness travel, providing opportunities for growth and economic development

Overview

Wellness tourism has been identified as one of the key global trends. There are many different meanings as to what wellness and wellness travel means.

The Global Wellness Institute states that it is a multidimensional concept.

In a tourism context, these have been interpreted to mean experiences focussing on “Sleep, Eat, Spa, Move, Mindfulness and Grow”.

Tourism Australia as part of its Future of Global Tourism Demand research stated that:

“Wellness Rolls On

Wellness and wellbeing are the megatrends of these post-pandemic times. The movement was building prior to COVID-19, but the last few years have accelerated the urgency and demand for wellness. We’ve all faced challenges, setbacks, grief, fear, uncertainty, a shortage of time, energy physical and mental space, and it’s taken its toll on us. Given pandemic reduced stress and anxiety, many are looking to reset, to re-equilibrate and re-centre.

As a result, people are looking for destinations and experiences to nourish the body mind and soul to stave off burn-out and fatigue. Key wellness experiences being sought include holistic health (of body, mind and spirit); health eating; meditation; yoga and fitness retreats, spa and pampering travel; travel that relaxes the mind; slow travel and screenless solitude.”

Source: “Global future of tourism demand research public report” Tourism Australia, 2022

Wellness Is Multidimensional

Wellness is about more than just physical health. Most models of wellness include at least six dimensions (and sometimes up to 9 or 12):



- **Physical:** Nourishing a healthy body through exercise, nutrition, sleep, etc.
- **Mental:** Engaging the world through learning, problem-solving, creativity, etc.
- **Emotional:** Being aware of, accepting and expressing our feelings, and understanding the feelings of others.
- **Spiritual:** Searching for meaning and higher purpose in human existence.
- **Social:** Connecting and engaging with others and our communities in meaningful ways.
- **Environmental:** Fostering positive interrelationships between planetary health and human actions, choices and wellbeing.

Source: <https://globalwellnessinstitute.org/what-is-wellness/>

While Wellness is very much an emerging industry in the YVDR, the region's unique locations and natural attributes make it the ideal place to leverage Wellness tourism.

State of play

At present, the YVDR has a limited number of multi-dimensional wellness-focussed experiences. The wellness experiences the region does have tend to focus on yoga or day spa experiences. There is the opportunity to expand the range of wellness products and experiences to meet the growing demand for wellness tourism.

What the region needs

The region needs to capitalise on proposed investments for prominent wellness attractions and explore new opportunities to branch into this market. This will help raise its profile as a destination that offers elevated and sought-after wellness experiences and deliver economic benefits to the community.

How this will be achieved

One of the exciting new proposed wellness developments for the Dandenong Ranges is at the historic Burnham Beeches property.

Developer Trenerry Consortium has announced that Six Senses will operate the wellness and accommodation elements. Six Senses is one of the world's leading hotel brands that specialises in wellness accommodation and resorts. Its catchcry – *“a passion for wellness community, sustainable design and smiles”* – should resonate with both visitors and the local community.

BURNHAM BEECHES



Source : <https://www.sixsenses.com/>

Subject to approval by Heritage Victoria and relevant planning authorities, the developers propose to spend more than \$100m on the project. This work would include restoring the mansion and gardens, as well as plans for the Nicholas Hall and Library, a restaurant, wellness retreat, pool, guest rooms and glamping. A rustic Village Square will also be created for the local community and visitors to use, even if they are not staying at the hotel.

Assuming the development goes ahead, it will be a gamechanger in terms of the region's reputation as a centre for wellness. If that occurs, the opportunity exists for YVDR to leverage this increased focus and reputation to create a broader offering of wellness facilities across the region.

This would include encouraging and supporting investment for potential activities, such as forest bathing, yoga retreats, meditation getaways, food foraging and other wellness activities.

A priority for the region should be to identify development sites across the region and establish an investment prospectus. This will strengthen the region's capability to attract further investment in the wellness space.

In the interim, the region can help drive this product by renewing its focus on existing wellness products through itinerary development and marketing opportunities.

It will also be important to ensure that there is a cultural overlay incorporating Traditional Owner principles into the holistic wellness experience which will add further cultural currency to the region.

Action items – product priorities

Wellness

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Wellness	1. Explore opportunities for product development in the region to enhance the Wellness credentials of the region. This may include forest bathing, yoga retreats, meditation getaways, food foraging and other wellness activities.			✓	Industry	M
	2. Create dedicated Wellness product campaigns to promote the strength of the product in the region that is related to the multi-dimensional wellness activities of Sleep, Eat, Spa, Move, Mindfulness and Grow.	✓			Industry	S
	3. As the number of wellness product grows across the region create and develop opportunities to encourage greater integration with packages and campaigns of existing hero products.	✓			Industry	M
	4. Collaborate with any new iconic wellness experiences to enhance the regional profile in this growth sector.	✓			Industry	S
	5. Integrate wellness product across the region to ensure that small day spas are part of the wider tourism wellness industry and understand their role in driving and supporting visitation.	✓			Industry	S
	6. Once Six Senses is operating, encourage more international wellness brands to the region.			✓	Industry	M
	7. Support involvement of Traditional Owner groups to develop wellness experiences that include a cultural overlay incorporating Traditional Owner principles as part of a holistic wellness experience.			✓	Traditional Owner Groups	M

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability



Section D: Environmentally sustainability

UNSDG impacted



ADDITIONAL REGIONAL INITIATIVE 1B

Tours & Attractions:

Developing new itineraries while supporting industry icons

VISION

The vision is to promote multi-stop, multi-day, mid-week and night tours to encourage longer stays and shift visitation away from weekends. Supporting continued investment in the iconic industry attractions to develop more mid-week and night-time activities will fast track this initiative.

Overview

The YVDR has been well served by a number of long standing visitor attractions that have become ‘tourism institutions’ and play a critical role in the visitor economy.

With the proposed shift in visitation through the actions defined in this DMP, it is envisaged that these iconic institutions will develop more mid-week, early morning, evening and night-time activities and experiences. This in turn will then support the multi day and overnight tour market.

State of play

Puffing Billy Railway, Healesville Sanctuary and Montsalvat are three of the long standing and hugely popular iconic attractions in the YVDR.

More recently a number of wineries – St Huberts, TarraWarra, Rochford – and food premises, including the Yarra Valley Chocolaterie and Ice Creamery, have become significant visitor attractions in their own right because they have developed experiences beyond their original core function.

They have, however, focussed largely on day activities with a weekend focus, with some occasional night-time activities, eg, Puffing Billy Railway “Train of Lights”.

Due to this, and current demand behaviour, tour operators largely operate day tours from the city into the region.



Source: <https://puffingbilly.com.au/>

How this will be achieved

There’s now an opportunity for these attractions to focus on developing their mid-week and morning and evening visitor offerings through relevant on site offerings.

As leading tourism attractions in the region, they can play a critical role in creating systemic change to the current day trip and weekend focussed visitor economy. An increase in these types of activities will play a critical role to achieve this change.

Puffing Billy Railway has recently successfully introduced a winter product called “Train of Lights”. The historic train

is lit up and travels through the forest in the dark.

There is the opportunity for other attractions to create similar events. It’s understood that planning is occurring for a potential night-time activation for ngurrak barrng | RidgeWalk and Maroondah Reservoir Park which could be wonderful and popular attractions that also have the potential to only be offered in off-peak periods to change visitor behaviour

Once these products are developed, tour operators will then be able to develop multi-day itineraries to match the new products on offer.

Action items – product priorities

Tours

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Tours and Attractions - Tours	1. Encourage tour operators and industry to create multi stop / multi-day / mid-week / night regional tours with dynamic pricing models.		✓		Industry	S
	2. Encourage activities that bring people mid-week or night to help the night-time economy grow.		✓		Industry	S
	3. Investigate alignment of resources across the region to establish and build upon familiarisation tours with journalists, bloggers and other influencers.	✓			Wine Yarra Valley, Industry	S
	4. Facilitate partnerships with local accommodation providers to offer package deals that include tours and activities in the area.	✓			Industry	M

Attractions

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Tours and Attractions - Attractions	1. Promote existing hero attractions in the region with a focus on development of night (also dawn and dusk) and mid-week product.	✓			Industry, Local Councils, LTAs	S
	2. Advocate with industry for dynamic pricing models to shift peak demand and encourage mid-week or night-time visitation.			✓	Industry, LTAs	M
	3. Foster the ongoing development of new and existing night-time experiences that encourage overnight stay.	✓			Local Councils, Industry	M
	4. Work with local Councils to ensure bus and car parking is appropriate at key sites across the region.		✓		Local Councils, LTAs, Dept Transport & Planning	S
	5. Collaborate with attractions to develop evening/ mid-week themed activities and unique product opportunities to draw new visitors into the region. E.g. Healesville Wildlife Sanctuary, ngurrak barring RidgeWalk, Puffing Billy Railway, Montsalvat etc.	✓			Industry	M
	6. Support the continued investment by government in the proposed masterplans of state infrastructure at Puffing Billy and Healesville Sanctuary to ensure their facilities continue to meet customer needs and can grow the visitor economy.			✓	Land owners, Councils, Industry	S

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability

UNSDG impacted



ADDITIONAL REGIONAL INITIATIVE IC

Arts Culture & Heritage: A new regional approach

VISION

The vision is to collaborate across the whole region to increase awareness about the arts, culture and heritage experiences that currently exist and work together to identify opportunities for growing future visitation through collaboration with other similar arts and culture experiences across the region and the state.

Overview

By working more closely together and developing an integrated product strategy, the arts, culture and heritage sector can grow awareness and provide a more diverse range of events and product offerings catering to the new target visitor markets.

State of play

The YVDR is fortunate to have many high quality art, cultural venues and heritage experiences with several now offering multi-channel experiences, including Montsalvat, TarraWarra, YAVA, Burrinja Cultural Centre, Bunjil Place, St Huberts, Waterwheel Art, Heide Museum of Modern Art and Coombe (just to name a few). This is in addition to several open studios events that

occur in each of the LAP sub regions. They tend to be marketed in isolation and not as a collective.

What the region needs

A whole of region integrated arts and culture plan focusing on “the whole being greater than the sum of the parts”. There is an opportunity to work with and leverage those activities and events across the YVDR region, particularly during the mid-week or evening.

How this will be achieved

There is an opportunity to cross promote locations across the region to create a truly engaging and rich cultural experience for both locals and visitors.

A multi-week ‘festival’ across each of the venues is one idea for consideration

that was raised in the community consultation for this DMP.

Additionally, the development of exhibitions or local festivals could be used to leverage visitation to the region in line with the Melbourne events calendar, eg, tennis photo exhibition during the Australian Open Tennis to attract event visitors, and leveraging the audience for other high profile events, including comedy, arts and fringe festivals.

There will be support for land owners around their need for continued funding to maintain the historic infrastructure, such as Gulf Station and Mont De Lancey and for proposed upgrades that will create new experiences for their guests.



Action items – product priorities

Arts, Culture & Heritage

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Arts, Culture & Heritage - Arts & Culture	1. Collaborate with local councils and industry to develop arts and culture events, galleries and exhibitions for potential cross region promotions opportunities e.g. Festivals, Open Studios.		✓		Local Councils, Industry	S
	2. Create opportunities to package arts and culture attractions with other visitor economy opportunities (eat, drink, stay, do...)		✓		Local Councils	S
	3. Use private and publicly owned assets or experiences (galleries, public art installations, gardens, parks...) as part of marketing collateral to promote the region.	✓			Local Councils	S
	4. Explore opportunities for creative arts installations and activities at Maroondah Dam.	✓			Industry, Wine Yarra Valley	S
	5. Undertake viability assessment for expansion of Nillumbik's Digital agora or other regional event activity such as unique, sustainable and iconic art installations.		✓		Local Councils, Industry	S
	6. Further develop and enhance key heritage trails for the region, eg Gulf Station, Puffing Billy	✓			Industry	S
	7. Support heritage land managers (e.g. Gulf Station, Montsalvat, Puffing Billy Railway) to undertake long term strategic planning to preserve their heritage and create relevant visitor experiences.			✓	Land Managers, Local Councils	S

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability

UNSDG impacted





ADDITIONAL REGIONAL INITIATIVE 2

Events: Showcasing the Naturally Impressive region

VISION

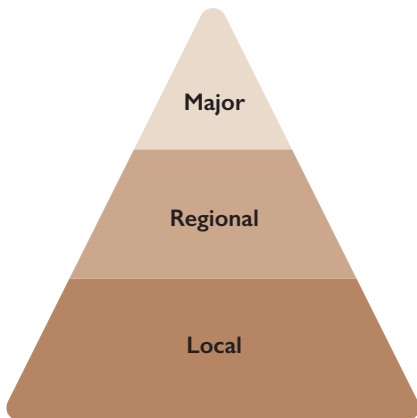
The vision is to create a new calendar of sustainable events that highlight the core product strengths of the region and encourage overnight visitation and more diverse experiences.

Overview

Events can be a very effective method of both promotion and visitor attraction for the region. They are also one of the principal ways in which a region can differentiate itself.

Events are usually broken down into three categories as part of a strategic focus.

They are:



Major events are the larger events that focus on driving significant visitation (international and interstate visitors as well as Victorians) and destination promotion. They have a significant budget, often with State Government support, and their aim is principally to drive economic benefit for the region.

Conversely, local events are focussed on improving the liveability of a town as well as providing experiences for visitors who are in the region. They are not designed to attract large numbers of visitors but to support the underling cultural and social fabric of the local town.

And regional events have an element of both – they are mid-size mid-scale events that seek to draw visitors as well as improve the region’s liveability for locals.

State of play

At present there is no overarching events strategy for the whole YVDR region, although there has in the past been more localised events strategies.

At present there are no major festivals held across the region. While there are a number of regional events, several of which are related to music and the arts through the Tesselaar Tulip Festival, KaBloom Flower Festival, Rochford Estate, TarraWarra Estate and Herb and Chilli Festival there is great opportunity to create new events.

As detailed throughout this DMP, some of the current key product drivers of

the region are Food and Drink, Nature – active recreation and Arts & Culture. Each of these three areas have significant opportunities for major or regional events and festivals. Many years ago, the Grape Grazing event held in the Yarra Valley attracted thousands of visitors. While such an event is no longer suitable, it does prove the region’s attraction for a food and drinks event. Equestrian events are also popular in the region, including Horseland Wandin Park International Horse Event and other local event activities.



What the region needs

An Events Strategy that features a series of events that showcase the region's core attributes and support the key objectives of this DMP needs to be developed.

How this will be achieved

The Events Strategy should set out the key objectives that would support the procurement or establishment of each event featured.

Those objectives should be consistent with this DMP's four key objectives.

1. Drive regional economic benefit by changing visitor travel behaviour
2. Improve the visitor experience
3. Improve liveability
4. Improve support for tourism in YVDR

Take, for example, the objective to change visitor travel behaviour by growing the mid-week and overnight visitor market. A 'festival' with a smaller number of daily visitors spread over a longer period would be more consistent with those objectives than a one or two-day event that attracts large volumes of day trippers.

Additionally, events that create significant publicity and promotion for the YVDR but may not draw significant numbers of visitors may also support the objectives. An example could be an event that is streamed or broadcast on television, or

a limited edition experience in a private location.

An event strategy is most effective when it also links the regional attributes with the desired event objectives. A mapping exercise can help identify events that align most clearly with the core pillars of:

- Food & Drink
- Nature – active or passive
- Arts, Culture & Heritage
- First Peoples
- Wellness

In this DMP, it's recommended that major or larger scale regional events be created around food and drink and mountain biking at the proposed Warburton MTB destination. Maximising the benefits of the region's equestrian facilities should also be a focus. Arts and culture events are more likely to be regional or local events. Over time, wellness and, if supported by the Traditional Owner Groups, a celebration of First Peoples culture may also be considered.

In creating larger scale events (both major and regional), a clear tourism focus needs to be embedded into the event plan. Simply running an event does not maximise the benefits for the visitor economy. A detailed tourism strategy with clear objectives, including overnight visitor numbers, economic benefit and publicity, should be developed for each event to ensure that it is meeting the

needs of both the community and visitor economy.

A strategic calendar could comprise one or two major events, four to five regional events and numerous local events.

The funding and resourcing of the events will require a mix from:

- State and/or Federal Government
- local councils
- corporate partners
- local industry, and
- industry associations.

Given budget limitations, the role of the industry associations is likely to be one of facilitation and coordination, rather than outright funding.

The event hierarchy detailed above – major, regional and local – will provide guidance on key funding sources. Major events, and those larger regional events that have significant economic or promotional value, should seek significant funding from the state. Whilst those with a more local community focus can seek support through councils. This will be a key part of the advocacy program.

At completion, each regional and major event should be assessed to measure its performance against its specified objectives. Ideally, the objectives for each event should align itself with those of this DMP – whether all or any individual objective.



Action items – product priorities

Events

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Events	1. Establish a Regional Events Committee for YRT that will work with industry and local government to align event activities and create showcase event products for the region that will drive mid-week and overnight visitation.		✓		Industry, Local Councils, LTAs	S
	2. Develop a regional events strategy that supports the DMP vision and key product drivers of nature, food & drink, First Nations, wellness and attractions. Potential areas of MTB, Food & Drink, Wellness, Arts, Culture and Heritage with a mid/multi week focus.	✓			Industry, Local Councils, LTAs	M
	3. Encourage business events organisers and larger accommodation providers to cross promote the activities and attractions of the region.	✓			Industry	S
	4. Work with Councils to coordinate funding opportunities for events that support the destination vision and positively impact the objectives of the DMP.	✓			Local Councils	M
	5. Create and attract events that showcase the core product strengths of the region and provide event activities that focus on overnight stays/or midweek visitation capable of attracting significant event funding support from the Victorian Government.		✓		Industry, Local Councils, LTAs	M

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability



Section C: Cultural sustainability



Section D: Environmentally sustainability

UNSDG impacted



ADDITIONAL REGIONAL INITIATIVE 3

Infrastructure: Investing for a sustainable future

VISION

The region will overcome the various infrastructure challenges by developing a clear plan and advocating for significant investment as a collective voice. Close engagement with multiple local governments will help develop a compelling case for investment in areas, such as internet access, waste management, roads and visitor servicing. Priority will be given to providing essential services, such as public toilets in high traffic areas, parking, and wayfinding, to enhance the visitor experience and promote the sustainable growth of the region.

Overview

Significant planning, investment and development is needed to create the much needed new infrastructure and maintenance of existing infrastructure that will support the region now and in years to come, and to deliver sustainable tourism. A key part of this success will depend on a clear plan and rationale to source the necessary funding from either private or public investment (or a combination of both) to deliver the infrastructure proposed in this DMP.

State of play

As detailed throughout this DMP, there is a strong need for new infrastructure in accommodation, transport and other key tourism related projects. While the planning issues for the infrastructure are detailed separately, the advocacy for the necessary planning reforms is also critical to funding infrastructure.

In addition to the new major infrastructure proposed, both the industry and local community have highlighted a significant need for considerable investment to improve the amenities and signage in many of the key tourism towns. The local community has also highlighted that investment is needed to maintain civic assets that are currently in place, especially in nature-based attractions, areas and parks across the YVDR.

What the region needs

Robust business cases that establish a reasonable return on investment (ROI) to attract private funding or economic impact for public investment will need to be developed. These business cases will also help determine the relevant size and

scale needed to deliver an appropriate ROI, which in turn will also help address the size or land limitations applicable to the relevant planning scheme.

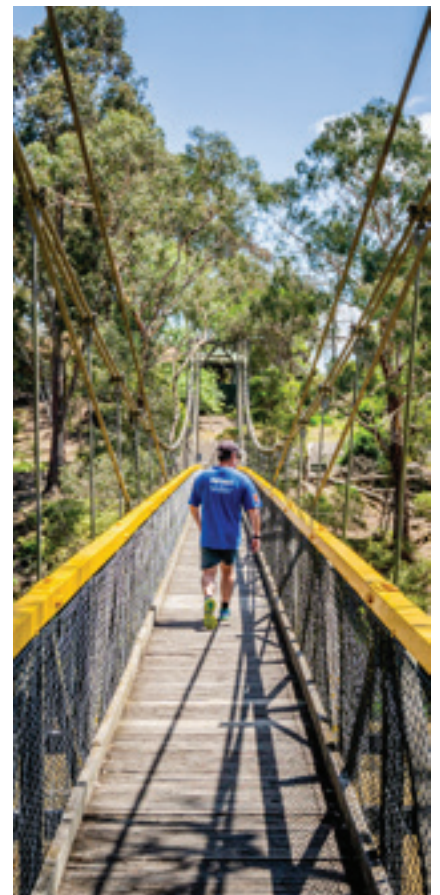
The proposed Destination Management Plan implementation committee comprising representatives of the key stakeholders will be key in achieving this outcome. The advocacy plan will also build clear connections to government, council and groups, such as the Victorian Tourism Industry Council, to reinforce the key messages.

How this will be achieved

- Implement a one voice, one message approach when advocating to government at all levels and consider creating a network of highly influential advocates for the region.
- Advocate for funding from State and Local Government to develop business cases for the key new infrastructure projects prioritised in the DMP – accommodation (international branded hotel), transport (transport hub and hop on hop off network) and key new experience products.
- Develop a Tourism Investment Prospectus in conjunction with Local and State Government that highlights to potential investors the needs and opportunity for the infrastructure. This can be supplemented with any business cases that are developed.
- Conduct a regional audit of key local infrastructure to identify priorities for investment that can be built into advocacy plans for each local area and key towns. These may include internet access upgrades, roads, parking, waste

management services, public toilet supply, street scape beautification, RV parking and dump points, EV fast charging, electricity supply, signage and wayfinding.

- Utilise the audits of key nature-based infrastructure and work with Parks Victoria and other providers of assets in the region (DEECA, Yarra Valley Water) to identify and detail maintenance and investment required. This includes developing a rolling 10-year asset maintenance prioritisation plan.



Action items – product priorities

Infrastructure

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Infrastructure	1. Conduct a regional audit of key infrastructure to identify priorities for investment that can be built into advocacy plans at a regional and local area level. These may include internet access upgrades, roads, parking, waste management services, public toilet supply, street scape beautification, RV parking and dump points, EV charging, electricity supply, signage and wayfinding.		✓		Local Councils, Land Managers	S
	2. Identify priority investment areas based on audit to advocate to key partners for funding. Priority to be given to infrastructure that increases the economic contribution of our identified Product priorities.		✓		Local Councils, Land Managers	M
	3. Utilising the audits of key nature based infrastructure, work with Parks Victoria and other providers of assets in the region (DEECA, Yarra Valley Water) to identify and detail maintenance and investment required.			✓	Land Managers, Local Councils	M
	4. Develop an Investment Prospectus highlighting for potential investors the needs and opportunity for the infrastructure together with the planning concierge support that will be provided by Councils (including potential site selection).		✓		Local Councils, Land Managers	M

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability



Section D: Environmentally sustainability

UNSDG impacted



ADDITIONAL REGIONAL INITIATIVE 4

Data & Insights: For an informed future

VISION

To establish a centralised resource for data and insights that will empower stakeholders to make informed decisions that drive positive outcomes for the region. This resource will bridge the gap in data and provide valuable insights to help the region thrive.

Overview

One of the biggest changes in tourism has been the increasing supply of data in recent years, largely from the digitisation of tracking and spend data, as well as meta data from online search behaviour. Yet this data is still quite expensive and often raw with few insights and needs interpretation.

State of play

While the Tourism Research Australia Visitor Economy Survey has served the industry well for many years, this new stream of data can now support the TRA data in a more granular way to understand more localised spend patterns. The meta data can also provide useful information on current and future trends for tourism based on search term and behaviour. Some councils already use this spend data that is generated by eftpos or credit card transactions and is available in near or real time.

What the region needs

Affordable, relevant and reliable data and insights that can inform the industry on the state of the YVDR's visitor economy and help to identify both performance and opportunities across macro and micro indicators.

A centralised resource for data and insights that will empower stakeholders to make informed decisions that drive positive outcomes for the region. This resource will bridge the gap in data and provide valuable insights to help the region thrive. The tourism industry has an increasing supply of data, largely from the digitisation of tracking and spend data, as well as meta data from online search behaviour. Yet this data is still quite expensive and often raw with few insights and needs interpretation.

How this will be achieved

Subject to cost and licensing issues, the opportunity may exist for councils and YRT to create a commercial clearing house model for this type of data with an additional concierge insights service. The aim would be to make the data more available and with prepared or custom insights for industry use. This would act as a key enabler for more informed tourism investment in the region.

This data should also be used to measure the success of the implementation of the actions recommended in this DMP and help develop investment models.



Action items – product priorities

Data and Insights

Product Priority	Action Items	YRT ROLE			Stakeholders	Timing
		Deliver	Partner	Advocate		
Data & Insights	1. Work with Councils to share data and insights with industry using available sources such as Annual Surveys, SpendMap, TRA data and other tourism related information. YRT will need to contextualise the data to the tourism industry where appropriate.		✓		Local Councils	S
	2. Engage industry expert/s to review tourism data on a regular basis throughout the lifecycle of the DMP and provide updated insights to the industry.		✓		Local Councils, Industry	S
	3. Closely monitor shifts in the mix of domestic day trip versus overnight visitors as a key performance measure for the DMP.		✓		Local Councils, Industry	S
	4. Closely monitor shifts in the mix of weekday versus weekend visitation as a key performance measure for the DMP.		✓		Local Councils, Industry	S

Sustainability impacts

GSTC criteria applied



Section A: Sustainable management



Section B: Socio-economic sustainability

UNSDG impacted



GLOSSARY & ACRONYMS

Activation Plans	An activation plan will look at ways to leverage infrastructure with clearly defined actions to maximise their benefit to the local region and meet the DMP's overall objectives. This may include initiatives to encourage visitation and realise business and community benefits. Areas that may be identified in an activation plan could include, accommodation supply in the local area, transport links, business opportunities, capability to deliver night time (including dusk and dawn) and mid-week activities, identification of key partners to work with and marketing and promotion activities.
DEECA	Department of Energy, Environment and Climate Action (Federal Government)
DJSIR	Department of Jobs, Skills, Industry & Regions (State Government)
DMP	Destination Management Plan
DTP	Department of Transport & Planning (Federal Government)
First Peoples	The groups of people whose ancestors lived in Australia before the arrival of Europeans. This term is used mainly to refer to the Indigenous peoples of the area.
GSTC	Global Sustainable Tourism Council
Industry	Assorted tourism industry bodies and individual businesses working in the visitor economy
International Visitor Nights	International visitor nights are the number of visitor nights by international visitors who are 15 years or older as estimated by Tourism Research Australia using the International Visitor Survey results.
Land Managers	Parks Victoria, Yarra Valley Water, Power Companies and Govt. Depts, Melbourne Water, Zoos Victoria
LAP	Local Area Plan
LGAs	Local Government Areas
LTA's	Local Tourism Associations
SDG	Sustainable Development Goals
Traditional Owner Groups	Refer to Wurundjeri Woi-wurrung Aboriginal Cultural Heritage Aboriginal Corporation, Bunurong Land Council Aboriginal Corporation and Taungurung Land and Waters Council
Social license for tourism	The local community's level of support and acceptance of tourism
TRA	Tourism Research Australia
UNSDG	United Nations Sustainable Development Goals
Visitor Economy Jobs	Visitor economy jobs are the jobs, not full time equivalent jobs, that are due to the direct or first round impact of visitor spending. This data is aggregated across all the industry sectors with the number of jobs attributed to the visitor economy reflecting the share of total sales due to visitor spending. This data is estimated by ABS for Australia and TRA for the States and tourism regions.
Visitor Spending	Visitor spending includes all overnight travel in the area and spending by visitors on domestic day trips who travel more than 25kms from their home and not for regular work or education purposes.
YVDR	Yarra Valley Dandenong Ranges
YRT	Yarra Ranges Tourism
Western Yarra Valley	The designated Local Area Plan geography that represents the Nillumbik LGA

Thanks to the DMP Project Steering Committee Members:

Leigh Harry
Chair Yarra Ranges Tourism Board

Michael Hands
Yarra Ranges Tourism Board

Simon O'Callaghan
CEO Yarra Ranges Tourism

Stacey Daniel
Yarra Ranges Tourism

Helen Ruddell
Yarra Ranges Council

Ben Harnwell
Yarra Ranges Tourism &
Manningham City Council

Christine Gibbins
Manningham City Council

Danielle Phyland
Nillumbik Shire Council

Kasey Lawrence
Nillumbik Shire Council

Tania Treasure
Nillumbik Shire Council

Chanmali Tregambe
Nillumbik Tourism Business

Kine Haugland/Helene Campbell
Dandenong Ranges Tourism

Sam Maddock
Warburton Valley Community
Economic Development Association

Sandra De Pury
Wine Yarra Valley



This Destination Management Plan was developed by ODIN360 for the Yarra Valley and Dandenong Ranges on behalf of Yarra Ranges Tourism (YRT).

