

# Greater Melbourne Destination Management Visitor Plan

Destination Melbourne  
2018



## Funding Partners



### Melbourne’s East

- City of Boroondara
- Manningham City Council
- City of Whitehorse

### Inner Melbourne

- Maribyrnong City Council
- City of Melbourne
- City of Port Phillip
- City of Stonnington
- City of Yarra

### Melbourne’s South East

- Bayside City Council
- Cardinia Shire Council
- City of Casey
- City of Greater Dandenong
- City of Kingston

### Melbourne’s West

- Western Melbourne Tourism
- Brimbank City Council
- Hobsons Bay City Council
- City of Melton
- City of Moonee Valley
- Wyndham City Council

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## The Plan

### Setting the Scene

A Destination Management Visitor Plan (DMVP) is a shared statement of intent to develop a destination over a stated period of time, articulating the possible roles of the different stakeholders and identifying opportunities to enhance the destination's appeal to visitors. The overarching purpose of this DMVP therefore is to collaborate with industry and government to expand the tourism focus of Melbourne beyond the boundaries of the CBD by focusing on the visitor journey, the uniqueness of different neighbourhoods, encourage dispersal, visitors to stay longer and spend more and experience all that Greater Melbourne has to offer. By leveraging Greater Melbourne's iconic brand of people, place, nature, history, sports, arts and culture, the tourism industry will further diversify and build higher yield experiences that will increase tourism visitation and spending.

A structured plan for Greater Melbourne, supported and integrated with four sub-regional plans: Inner, West, East and South-East, will coordinate effort, reduce duplication and maximise investment in the right areas by bringing independent partners together in partnership to benefit and develop the entire visitor economy.

### Greater Melbourne Today

**The unique attraction of Greater Melbourne is the combination of many things. Greater Melbourne has an unrivalled breadth and depth of quality tourism products and experiences, such that whatever a visitor's needs and interests are, they can be satisfied in Greater Melbourne.**

Melbourne is one of Australia's most vibrant and culturally diverse destinations and has been recognised by the Economist Intelligence Unit as being the most liveable city in the world every year since 2011. Greater Melbourne is Australia's culinary, cultural and sporting powerhouse and is the gateway to regional Victoria. The key pillars of food & wine, arts & culture, sports & events, fashion & shopping and parks & gardens are common strengths found across Greater Melbourne and undeniably the bedrock of the visitor economy.

Tourism is vitally important to the Greater Melbourne economy; in 2015-16 it generated 126,800 jobs across Greater Melbourne and delivered \$15.3 billion of gross regional product (DEDJTR, 2017a). In 2016-17, Greater Melbourne welcomed the highest number of international visitors on record, and more people took a day trip within the Greater Melbourne region than any other year to date.

Despite such positive growth, the majority of tourism investment and activity takes place in and around the CBD core. The aim of this DMVP therefore is to grow visitor volumes and increase both spend and length of stay, but also to disperse the benefits across a wider region through increased value propositions.

### Maintaining Competitive Advantage

**While changes are required to move tourism in Greater Melbourne to the next level, it is starting from a position of considerable strength. As the most liveable city in the world for the seventh year in a row, Greater Melbourne undoubtedly has a number of comparative advantages on both global and national levels.**

A desired outcome of this DMVP is the recognition of Greater Melbourne as a globally competitive multi-layered tourism destination, which is a world leader in providing highly personalised, high quality, enriching and long-lasting experiences delivered through digital innovation. As the leading arts, sports, food & wine and events capital of Australia, Greater Melbourne has much to offer visitors, be they Melburnians discovering their own backyard, regional Victorians, visitors from interstate or international visitors from traditional or emerging source markets.

### Collaborative Efforts

Multiple government departments and tourism agencies all invest in Greater Melbourne's tourism industry. It is therefore important to ensure that strategic priorities are considered against State and Local Council policies and that action is cohesive. This DMVP has been developed with this in mind and establishes a framework which requires positive government support and private sector input to make it succeed.

### Guiding Principles

**Collaboration:** The plan outlines an intraregional approach to collaboration with stakeholders, departments and agencies that play a role in tourism product development and marketing in Greater Melbourne. Maximum benefit will be achieved through a collaborative approach with private sector and not-for-profit partners

**Greater efficiency:** The strategic opportunities identified in this DMVP will provide a framework, which has potential to improve Greater Melbourne's efficiency and use of resources to help grow a sustainable and regionally-connected visitor economy.

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**Improved service delivery:** The DMVP suggests improvements for service delivery and collaboration to deliver economic growth. These are tangible initiatives that allow all tourism partners to engage in strategic tourism product development to achieve specific outcomes.

**Better outcomes:** The overarching goal of this DMVP is to increase the quality of visitor experiences and increase dispersal which in turn, will increase visitor spending, create memorable experiences and encourage repeat visitation. The achievement of these goals will result in improved economic outcomes for all tourism and community stakeholders.

## Measuring Success

Each of the recommended opportunities identified includes suggested stakeholders/partners who could potentially work collaboratively to develop a focused and measurable implementation plan. Different actions and outcomes will require the leadership of varying stakeholders – this plan does not seek to assign responsibility or leadership for any particular action or desired outcome – rather the stakeholders collectively should engage with each other to determine the leadership and participation on a case by case basis.

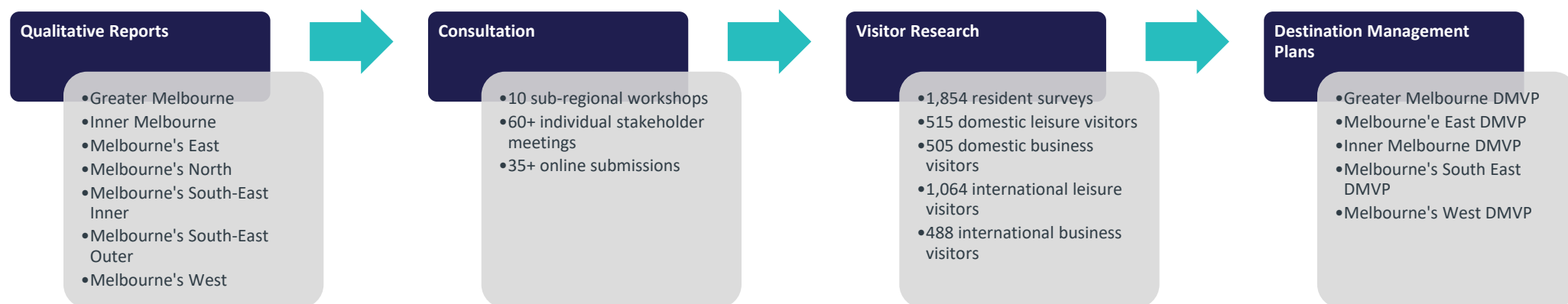
Measurement of success will be through TRA visitor statistics.

# Greater Melbourne Destination Management Visitor Plan

OUTCOMES BY 2027	<ul style="list-style-type: none"><li>• 28% growth in visitors (to 34.9 million)</li><li>• 68% growth in visitor nights (143.2 million)</li><li>• 50% growth in visitor economy (\$24.9 billion)</li></ul>	Greater Melbourne: Creating better quality and highly personalised visitor experiences	RESULTS
STRATEGIC THEMES	1. Positioning & Branding 2. Tourism Product 3. Event Development 4. Capacity & Capability 5. Information 6. Supporting Infrastructure		STRATEGY
WHO'S RESPONSIBLE	Whole of region and sub-regional working groups comprising a cross-section of stakeholders involved in the tourism industry, supported by Destination Melbourne and relevant Government organisations.		
VISION	By 2027, Greater Melbourne will have grown its visitor expenditure by 50%. This will be achieved by working collaboratively with tourism stakeholders to provide enhanced and enriched tourism products and experiences that will captivate visitors to discover and disperse across Greater Melbourne, delivering wide-reaching benefits across the entire local economy		
RECOMMENDED OPPORTUNITIES	<ul style="list-style-type: none"><li>• Create cohesive marketing, branding &amp; cross-promotion across Greater Melbourne</li><li>• Support and promote digital assets to create tailored and highly personalised visitor itineraries &amp; experiences</li><li>• Raise awareness of the connectivity of public transport</li><li>• Make it easier for visitors to access and use myki</li><li>• Improve and expand internationally recognised accommodation provision outside the CBD</li><li>• Promote parks &amp; gardens as an additional tourism pillar</li><li>• Promote cultural food communities in food &amp; wine offering</li><li>• Extend events &amp; festivals to incorporate metropolitan regions</li><li>• Grow business tourism outside the CBD</li></ul>		OPPORTUNITIES
ENHANCE EXISTING CAPABILITIES			FOUNDATION
CONSIDER VISITOR PERCEPTIONS			
BUILD ON CURRENT STRENGTHS			

## The Process behind this Destination Management Visitor Plan

This DMVP represents the collective ideas, aspirations and visions of a diverse and influential group of stakeholders and visitors to Greater Melbourne.



The process of creating a DMVP for Greater Melbourne and each of the five sub-regions (Melbourne's East, Inner Melbourne, Melbourne's North, Melbourne's South East and Melbourne's West) began in February 2017 with the development of a series of qualitative "situation analysis" reports for each sub-region and an overarching report covering the 29 local government areas (LGAs) comprising Greater Melbourne. These qualitative reports provide a summary of the visitation profile, an overview of tourism products (classified by access, accommodation, attractions, activities, amenity) and events in each region, as well as analysis of key strategic plans and policy documents underpinning and influencing the future development of the visitor economy in each sub-region and LGA. An interactive mapping tool was also developed to provide a spatial distribution overview of visitation characteristics at the SA2 level<sup>1</sup>.

A series of ten workshops and over sixty individual stakeholder consultations were conducted in March and April 2017 during which five key questions were asked to frame and help shape the blueprint for this and sub-region DMVPs. This was followed by a further 35 individual online submissions from individuals who were not able to attend either the workshops or be part of the face-to-face stakeholder consultation phase. Visitor perception research (via phone and intercept surveys) involving a cross-section of Melburnians, domestic and international leisure and business visitors to Greater Melbourne was also undertaken. This research yielded valuable insights regarding the profile of visitors to Greater Melbourne, their view of Melbourne's current tourism offering and their overall perception of Melbourne competitiveness as a visitor destination.

<sup>1</sup> SA2 (Statistical Area Level 2) is one of the spatial units defined under the ABS Australian Statistical Geography Standard (ASGS).

## Strategic Themes & Recommended Opportunities

STRATEGIC THEME 1	POSITIONING & BRANDING
Recommended Opportunities	1.1 Develop a collaborative working partnership approach to developing and promoting tourism in Greater Melbourne
	1.2 Ensure that Greater Melbourne, sub-regions and tourism precincts align with Visit Victoria's Melbourne marketing brand
	1.3 Develop digital content to enhance digital marketing
	1.4 Enhance digital assets to deliver personalised experiences
STRATEGIC THEME 2	TOURISM PRODUCT
Recommended Opportunities	2.1 Enhance parks, gardens, nature and outdoor brand and offering
	2.2 Increase activation of the Maribyrnong and Yarra Rivers, associated waterways, and beaches and Port Phillip Bay
	2.3 Investigate the industrial tourism potential offering of Greater Melbourne
	2.4 Further develop the indigenous cultural offering in Greater Melbourne
	2.5 Expand Greater Melbourne's live music scene to grow the night economy
	2.6 Refine and promote Greater Melbourne's retail and market offering
	2.7 Develop the food, wine & beverage offering beyond the CBD
	2.8 Identify existing and new precincts which require investment or development to maximise their tourism potential
	2.9 Elevate and broaden Greater Melbourne's status as a Creative City
STRATEGIC THEME 3	EVENT DEVELOPMENT
Recommended Opportunities	3.1 Expand and refine current events strategies to encourage dispersal of events across Greater Melbourne
	3.2 Identify and activate under-utilised spaces to create new and intimate venues to host events
	3.3 Develop and bid for new festival and events across Greater Melbourne with a vision for dispersal and growth
STRATEGIC THEME 4	CAPACITY & CAPABILITY
Recommended Opportunities	4.1 Create an industry-wide collaborative working group to deliver on the recommended opportunities of the DMVP
	4.2 Learn about what other Greater Melbourne destinations have to offer and learn from best practice application
	4.3 Partner with Study Melbourne to understand the impact of international students on Greater Melbourne's visitor economy
	4.4 Further develop the existing Greater Melburnian Ambassador Program to promote individual places/regions
	4.5 Stimulate investor confidence throughout Greater Melbourne

# Greater Melbourne Destination Management Visitor Plan

STRATEGIC THEME 5	INFORMATION
Recommended Opportunities	5.1 Use digital technology, platforms and systems to create marketing innovation across all tourism businesses
	5.2 Inform decision-making with data, research, intelligence and insights
	5.3: Roll-out the Melbourne Wayfinding Signing Master Style Guide across Greater Melbourne
STRATEGIC THEME 6	SUPPORTING INFRASTRUCTURE
Recommended Opportunities	6.1 Work with Transport for Victoria and its agencies to promote greater use of public transport and positive visitor experiences
	6.2 Communicate ways to travel within and across Greater Melbourne on public transport
	6.3 Improve sense of arrival for cruise ship passengers at Station Pier
	6.4 Increase diversity of visitor accommodation across Greater Melbourne



## Key Investment Opportunities

Based on a culmination of primary and secondary research undertaken in developing this and the sub-regional DMVPs, a range of infrastructure and strategic opportunities have been identified which, if realised would both complement and diversify Greater Melbourne's tourism industry.

Please note: The opportunities presented below represent ideas of what could be developed to enhance the visitor offering of Greater Melbourne - they have not been qualified by feasibility studies or cost benefit analyses, nor have they been pre-assigned any funding to realise development – they are suggested opportunities.

### MELBOURNE WIDE

#### Infrastructure Opportunities

- + Work collaboratively to deliver improved, integrated transport infrastructure services (particularly east-west connections) using a visitor lens to improve travelling times between key points of interest.
- + Continue to work with Victorian Ports Corporation (Melbourne) to examine the strategic and infrastructure options for domestic ferry and cruise ship options.
- + Develop a tourism investment prospectus to attract international operator interest to meet demand gaps.
- + Support the future development of the Airport Rail Link and the 90km Suburban Rail Loop to encourage dispersal across Greater Melbourne.

#### Strategic Opportunities

- + Work collaboratively to deliver a coordinated approach to marketing across the Greater Melbourne region.
- + Work with Local Councils and Parks Victoria to develop a Parks, Gardens & Nature Visitor Strategy which will capitalise natural environmental assets (waterways, green spaces, trails network) to enhance the outdoor brand positioning of Greater Melbourne and to encourage dispersal from CBD to outer metro regions.
- + Develop a connected golf tourism strategy for all Greater Melbourne regions.

- + Investigate opportunities (and supporting infrastructure required) to activate the Maribyrnong and Yarra rivers and associated waterways to enhance visitor appeal.
- + Investigate the adventure tourism appeal of lakes and reservoirs throughout Greater Melbourne.
- + Develop a clear industrial tourism strategy for Melbourne's West and South East to showcase the industrial background of Newport, Spotswood and Yarraville among others specifically and the food manufacturing and beverage sites in the South East generally.
- + Work with other regions to connect with complementary Aboriginal tourism products such as the Spiritual and Healing Trail, Brimbank Park, Merri Creek, and the Koori Mural.
- + Work with Music Victoria and Melbourne Music Advisory Committee to develop a Music Strategy for Greater Melbourne based on best practice outcomes as delivered through the City of Melbourne Music Strategy.
- + Use existing strategic plans, create a sustainable urban markets action plan to support and grow street and covered markets as visitor destinations in their own rights (including, amongst others, St Kilda Esplanade Market, South Melbourne Markets and Dandenong Market).
- + Develop a clear food, wine & beverage tourism strategy all sub-regions in conjunction with existing food and wine strategies with the aim of packaging the different elements into an offer for visitors and tested through a series of new marketing initiatives.
- + Work in an integrated manner with government and statutory authority partners to improve the tourism experience for visitors at key tourist precincts in the CBD including: Melbourne Museum

# Greater Melbourne Destination Management Visitor Plan

Precinct, Federation Square, Southbank Precinct. In regional Melbourne, Werribee Park, Arden and others in regional Melbourne.

- + Work with stakeholders within the NGV, Arts Centre Melbourne and local tourism operators, cultural and arts organisations and associations to develop a well- defined precinct with gateway signage, street performers, pavement art.
- + Work with Creative Victoria to ensure that Greater Melbourne is integrated with Melbourne's (CBD) creative strategy and cultural community and acts as a springboard for new initiatives.
- + Further enhance the existing Tourism Excellence program for industry to increase operator knowledge and understanding of the experiences on offer in their own region and in adjacent regions (Operators on tour program).
- + Work with Study Melbourne to compile a segmentation profile of international students (nationality, country of origin, age, campus location, course of study, length of course)
- + Encourage more Melburnians to enjoy the destinations on their doorstep by expanding the delivery of "Discover your Own Backyard" campaign and encouraging local residents to perform ambassadorial roles for Greater Melbourne. Lessons learned from the Greater Melbourne's existing VICs as well as Melbourne's Red Coat volunteers should be leveraged to maximise outcomes.
- + Develop a communications strategy which highlights the positive contribution of tourism to society, including socio-economic benefits, job creation, skills development and contribution to creativity and innovation.
- + Promote and encourage the roll-out of the Melbourne Wayfinding Signing Master Style Guide (as developed as an outcome of the Melbourne Visitor Signage Project) across Greater Melbourne, commencing with Inner Melbourne (and secondly with Melbourne's West) to build consistency between existing wayfinding signage systems in Melbourne.
- + Work in partnership with Transport for Victoria and its agencies to develop campaigns that encourage travel along specific lines and routes.
- + Work with Transport for Victoria and its agencies to develop simplified myki communications.
- + Undertake a detailed visitor accommodation audit and gap analysis to identify gaps in the diversity of accommodation provision, international brand presence, quality and facility

provision and develop an options model and accommodation strategy to meet current and future anticipated demand drivers.

## Event Opportunities

- + Create new walking, cycling, canoeing events which showcase the natural offering of Greater Melbourne.
- + Create sustainability, wildlife, nature and environment events and festivals to showcase Greater Melbourne's strength in parks, gardens and nature.
- + Pilot a Melbourne Industrial Heritage Week which celebrates the industrial heritage offering in Melbourne's West (and other regions, notably Melbourne's South East).
- + Extend the events and activities of Melbourne Music Week to include Greater Melbourne.
- + Work with Visit Victoria, Melbourne Convention Bureau and others to expand and refine Melbourne's event strategy to encourage greater dispersal of events across Greater Melbourne.
- + Investigate the potential of using the Maribyrnong and Yarra rivers for flotilla, pageants and events.
- + Develop and promote a comprehensive events calendar.

## MELBOURNE'S EAST

### Infrastructure Opportunities

- + Investigate the potential of developing corporate hotels (with conference facilities) in Box Hill CBD, Monash University and Ringwood and boutique hotels near Heide Museum of Modern Art.
- + Use existing laneways in Box Hill to develop a laneway cuisine trail.
- + Investigate the potential for creating an artists' retreat near Heide Museum of Modern Art to increase length of stay and create authentic and immersive experiences.

### Strategic Opportunities

- + Promote the protection of Melbourne's East biodiversity and natural environment by investigating the visitor appeal of Green Wedges.

# Greater Melbourne Destination Management Visitor Plan

- + Promote the availability of mountain bike and canoeing trail experiences in Melbourne's East.
- + In conjunction with Melbourne's South East develop a connected golf tourism strategy for the region.
- + Investigate opportunities (and supporting infrastructure required) to activate the Yarra River and associated waterways to enhance visitor appeal.
- + Provide input into a riverside enhancement strategy for the Yarra River to identify potential tourism nodes/precincts for development.
- + Use current plans and strategies to develop an arts and cultural tourism strategy for Melbourne's East (including visual, creative and performing arts) and cultural assets to strengthen the East's positioning as an arts and cultural destination.

## INNER MELBOURNE

### Infrastructure Opportunities

- + Create a signature arts precinct gateway to the NGV/Arts Centre Melbourne/Hamer Hall/Australian Centre for Contemporary/MTC/Melbourne Recital Centre to maximise partnerships across the precinct and the visitor experience.
- + Investigate the appetite for the introduction of efficient water taxi shuttle operations and river cruises.
- + Promote sustainable travel to and from Inner Melbourne's markets by increasing cycle parking availability in and around markets.

### Strategic Opportunities

- + Support the parks, gardens and nature public space developments proposed in the St Kilda Triangle masterplan to create a beach and bayside tourism precinct along the St Kilda Esplanade.
- + Encourage the creation of a quarterly/annual "Museums at Night" after-hours festival of culture and heritage across art and museum venues in Inner Melbourne

- + Create a monthly "Love your Local Markets" event which celebrates, supports and provides opportunities for the sector. It also serves to enhance the night-time economy and create vibrancy within tourism precincts.
- + Encourage initiatives to use buildings and street spaces temporarily for creative uses.
- + Advocate for the development and implementation of international best practice programs to activate the evening and night time economy (e.g. UK Purple Flag accreditation scheme).

## MELBOURNE'S SOUTH EAST

### Infrastructure Opportunities - South East Outer

- + Enhance access to green spaces through the implementation of a connected trails networks (walking, cycling and horse riding), supported by appropriate information and good interpretation of the physical and cultural context.
- + Investigate the adventure tourism appeal of Cardinia Reservoir.

### Infrastructure Opportunities - South East Inner

- + Encourage investment in boutique hotels and golf resort accommodation in South East coastal regions.
- + Investigate the potential of enhancing the tourism appeal of the Australian National Aviation Museum at Moorabbin Airport to increase dwell-time, diversify target audiences and create immersive experiences.
- + Investigate the potential of using the dinosaur footprints and fossils found along Melbourne's South-East coastline to develop coastal experiences through geological time.
- + Investigate potential to boost the coastal culinary tourism e.g. through food trucks, seafood restaurant, seafood cooking school.
- + Improve communications on how visitors can reach the coast from nearby train stations.

### Strategic Opportunities - South East Outer

- + Investigate the adventure tourism appeal of Cardinia Reservoir.

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- + Investigate the development potential of Melbourne Water Recreation Area to create a nature conservation/urban oasis/wetland centre.
- + Investigate the opportunity to create food manufacturing factory experience tours.

## Strategic Opportunities - South East Inner

- + Develop a coastal tourism strategy for the South East which aims to elevate the region's status as a recreational water playground.
- + Investigate the opportunity to improve casual dining options in key water sport activity precincts.
- + Develop a golf tourism strategy to elevate the South East's position as a world-class golf destination.

## Event Opportunities

- + Create an aviation festival to celebrate the South East's importance in training the pilots of tomorrow.
- + Create an annual dinosaur/fossil festival to reinforce the South East's positioning on the Jurassic Coast.

## MELBOURNE'S WEST

### Infrastructure Opportunities

- + Support the attraction of regional investment in hotel accommodation at key visitor nodes
- + Investigate ecotourism accommodation development opportunities in areas with high biodiversity appeal, especially those close to RAMSAR sites and coastal areas of significance.
- + Develop connected trails networks (walking, cycling and horse riding), supported by appropriate information and good interpretation of the physical and cultural context.
- + Support the masterplan for Werribee Open Range Zoo.
- + Continue to work with Melbourne Water and other key stakeholders to create bird watching/interpretative centres at key sites throughout the region.

- + Advocate for further progression of the creative and technology hubs for Museum Victoria and Scienceworks.
- + In collaboration with indigenous representatives, Land Compensation and Cultural Heritage Council, Parks Victoria and Brimbank City Council, investigate the potential of creating a visitor attraction and interpretation centre in Brimbank Park which showcases the Aboriginal archaeological importance of the area.
- + Support further improvements at Seaworks and Nelson Place in Williamstown under a Tourism Precinct approach.

## Strategic Opportunities

- + Develop a clear industrial tourism strategy for Melbourne's West to showcase its industrial heritage.
- + Work to segment the marine tourism market and identify the priority market opportunities and effective routes to these international markets and customers with a clear and consistent approach.
- + Investigate opportunities to grow the golf tourism markets in Melbourne's West and dovetail this with other strategies in other sub-regions (e.g. East and South East).
- + Further develop the Warrensbrooke Faire tourism precinct.
- + Leverage the development of the Airport Rail Link and development of Avalon Airport as an international air terminal.

## Event Opportunities

- + Consider a Melbourne Industrial Heritage Week which celebrates the industrial heritage offering in Melbourne's West and other regions (e.g. South East and Inner).
- + Work collaboratively across the region to cooperate in the development and leveraging of major events calendar across all sectors including food, beverage, arts, business, sport and special interest.
- + Create a wildlife & safari festival to promote the zoological assets of Werribee Open Range Zoo and RAMSAR Wetlands and the Dingo Discovery Sanctuary and Research Centre.

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- + Integrate the region's Lunar New celebrations into a broader program across Melbourne.



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# Destination Management



Collectively, the strategic priorities laid out in this DMVP have the potential to increase dispersal across Greater Melbourne thereby improving its competitiveness and encouraging visitors to stay longer and spend more. It is anticipated that the end result will engender civic pride, attract new generations of visitors and improve Melbourne's status as a nationally and globally competitive destination. The strategic priorities are both challenging and aspirational, but entirely achievable.



# Greater Melbourne Destination Management Visitor Plan

**This Destination Management Visitor Plan (DMVP) is designed as a strategic framework to encourage regional collaboration and to guide future development opportunities.**

**Success will be measured by the extent to which each council region is able to develop as an important visitor destination in their own right, and their ability to contribute to the strengthening of Greater Melbourne as a globally competitive destination.** Instigated and managed by Destination Melbourne, the DMVP sets out how Greater Melbourne can improve its competitive positioning as a global tourism destination over the next ten years. The DMVP has the needs of all investors and visitors at its heart and seeks to improve the region for everyone.

## WHAT IS A DESTINATION MANAGEMENT VISITOR PLAN?

**Destination management is a process that seeks to coordinate all aspects of a destination that contribute to a visitor's experience, taking into account the needs of visitors, local businesses, residents and the environment.** A Destination Management Visitor Plan (DMVP) seeks to create high-quality visitor experiences and is a tried and tested approach to maximise the benefits of tourism to the destination.

As a comprehensive framework, DMVPs identify the competitive advantages of the destination, the target markets potentially interested in visiting; how the destination could be enhanced to take full advantage of its unique competitive advantages, and how the destination could reach out to and compel its target markets to visit.

DMVPs are not prescriptive plans for tourism development, nor are they tourism strategies for individual councils; they are also not a guarantee for funding and are not a quick-fix solution. Rather, DMVPs focus on identifying the unique competitive advantages of a destination through a visitor lens (gained through extensive consultation) and provide recommendations on how these unique elements can be translated into tangible opportunities to enhance the visitor experience and visitor economy.

Visitors do not make travel decisions based on council or State boundaries; their decisions are guided by their personal interests and desire for discovery. This in turn, calls on governments and the visitor industry to work collaboratively to provide the best possible all-rounded experience for visitors. The collective benefits of increased visitor spend, increased profile, increased investment in tourism infrastructure and direct and indirect economic benefits at a regional level are too significant to ignore and simply sustain the status quo.

## WHO IS THIS DMVP FOR?

This DMVP is relevant for tourism organisations, associations and working groups, local governments, state governments, industry and all tourism stakeholders with an interest in growing their visitor economy and individuals who are interested or engaged in the process of destination management at different levels.

## WHAT VALUE DOES THIS PLAN SEEK TO DELIVER?

It is envisaged that this DMVP will be of value to a wide audience of organisations whether as a reminder of the region's unique competitive positioning as a tourism destination, or as a source of ideas and inspiration to develop, deepen and strengthen its visitor economy. It is relevant to destinations which already have a DMVP, a tourism strategy or equivalent document and who want to strengthen or renew it, as well as to those who are at the beginning of planning together.

## WHAT IS THE AIM THIS PLAN?

**The aim of the DMVP is to provide a strategic framework which encourages regional collaboration by multiple stakeholders to guide future tourism development opportunities across Greater Melbourne to 2027. A key feature of the DMVP is that it is directly linked to the State (and National) targets of growing the diversity of the visitor offering as a means to increase the economic contribution of tourism. The DMVP also links inextricably with the DMVPs developed for Melbourne's East, Inner Melbourne, Melbourne's South East and Melbourne's West. Based on available research, consultation and stakeholder feedback, and a review of existing planning, reviews and reports, this DMVP also builds on grass roots support for key initiatives from local tourism organisations, local government, and tourism operators.**

**This DMVP is not intended to replace the tourism work already taking place across Greater Melbourne. It is essential that this work continues in a cohesive manner to deliver well-managed tourism precincts with a strong sense of place that invest in their visitor experiences. Work undertaken at a council level is the foundation which will enable Greater Melbourne to benefit from the suggested activity set out in this DMVP.**

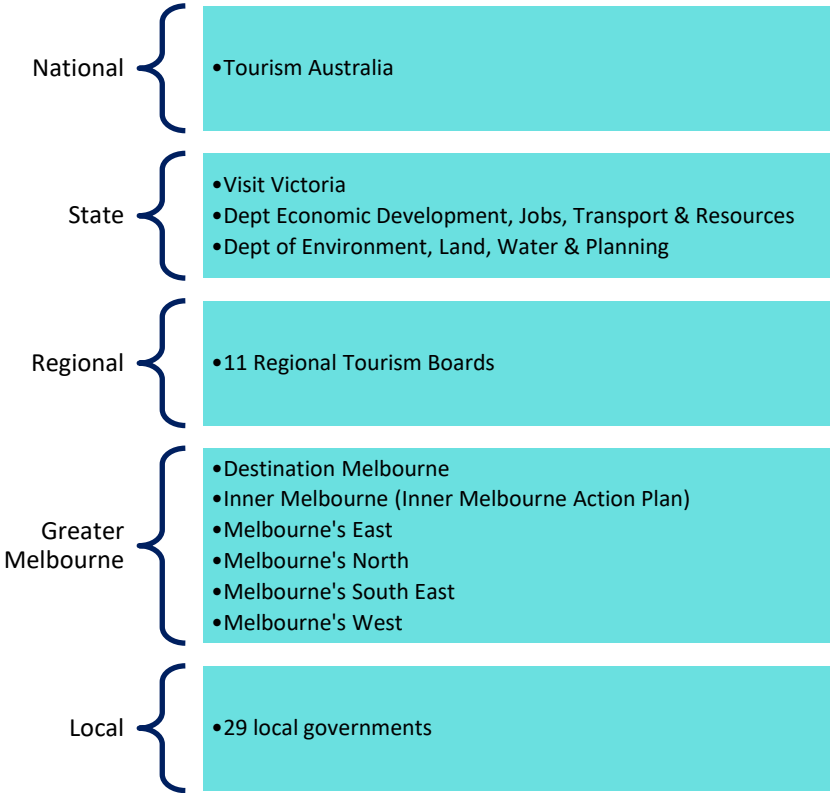
WHO IS INVOLVED?

Indicative of the importance of the visitor economy, all levels of government from national through to local councils are involved and have all published strategic industry framework documents which are focused on creating and stimulating further growth in the sector.

- + **Tourism Australia** is the Australian government agency responsible for attracting international visitors to Australia, both for leisure and business events. Tourism Australia is responsible for implementing *Tourism 2020* - a whole of government and industry long-term strategy to build the resilience and competitiveness of Australia’s tourism industry and grow its economic contribution. Tourism Australia shares this goal with Commonwealth, State and Territory governments in an effort to maximise tourism’s economic contribution to all Australians.
- + **Visit Victoria** brings together the functions of Tourism Victoria’s marketing division, the Victorian Major Events Company and the Melbourne Convention Bureau to form a single, unified organisation dedicated to growing Victoria’s visitor economy through tourism marketing and event acquisition. The organisation is spearheading a cohesive, new approach to marketing Melbourne and Victoria to attract more visitors and world-class events to the state and consolidate Melbourne and Victoria’s position as a leading global tourism and events destination.
- + The **Department of Economic Development, Jobs, Transport and Resources** is responsible for investment facilitation and attraction to Victoria, including all tourism related investments. The Victorian Government’s objectives for supporting the growth and sustainability of the tourism, events and visitor economy sector are outlined in the *Victorian Visitor Economy Strategy (2016-2025)* and are implemented through the *Victorian Visitor Economy Action Plan*. Within the Department, Transport for Victoria is responsible for all transport agencies working together to provide an integrated and sustainable transport system for residents and visitors.
- + **Victoria’s 11 regional tourism boards** and Destination Melbourne are each tasked with the strategic marketing and promotion of their tourism assets.
- + Greater Melbourne is divided into **five sub-regions**, with each sub-region comprising representation from their respective local councils. Some sub-regions are more structured and

collectively active than others, but all aspire to develop and strengthen their competitive tourism positioning.

- + **Local Governments** (of which 29 form the Greater Melbourne Tourism Region<sup>2</sup>) are each tasked with tourism promotion and marketing within their own jurisdictions. All local councils recognise the economic contribution of tourism and, as such, have developed tourism strategies (either as standalone strategies) or encompassed within their Economic Development Strategies). Some councils (particularly those located within close proximity to Melbourne CBD) have dedicated tourism resources, whilst in other councils the role of tourism development and promotion is undertaken by the economic development team.



<sup>2</sup> Note: For the purposes of this report, only 24 local councils participated in the creation of the GMDVMP.

# Greater Melbourne Destination Management Visitor Plan

## EXISTING PLANS & STRATEGIES DRIVING TOURISM

There are a number of key plans and strategies that have a relationship with the DMVP.

- + From a State perspective, the **Victorian Visitor Economy Strategy (2016-2025)** (which supersedes Victoria's 2020 Tourism Strategy) plays a pivotal role in shaping the delivery of the DMVP from an overarching State level.
- + From a local-perspective, **the tourism plans and strategies of individual councils** (including cultural heritage and economic development strategies) have also been considered.

### Victorian Visitor Economy Strategy (2016-2025)

This strategy is focused on driving decision-making and facilitating investment in Victoria until 2025 in order to deliver better visitor experiences. The strategy identifies nine priority areas, each with aligned actions:

- + More private sector investment
- + Build on the potential of regional and rural Victoria
- + Improved branding and marketing
- + Maximise the benefits of events
- + Improved experiences for visitors from Asia
- + Better tourism infrastructure
- + Improved access into and around Victoria
- + A skilled and capable sector
- + More effective coordination

## Implications for the DMVP

Based on all relevant policies, strategies and regulations, the DMVP is cognisant of:

- + **Connecting the economic value of the visitor economy**, aligned with international education, business investment, property development, local liveability, population growth and employment dispersal and enrichment of local access.
- + **Maximising digital marketing opportunities** to ensure that the industry is positioned at the forefront of digital destination marketing.
- + **Potential for greater job creation** in order to achieve higher economic growth.
- + **Increasing and stimulating investment** by going BIG i.e. taking calculated risks in order to create game-changing tourism products and increasing job creation opportunities. This means identifying and supporting large-scale projects which add value to the tourism landscape and generate economic benefits.
- + **Improving tourism infrastructure** to enhance the visitor experience through increased visitability, connectivity and dispersal across Greater Melbourne.
- + **Enhancing the quality and sustainability of tourism products and experiences** through greater focus on consistent quality assurance within the industry.
- + **Promotion of inclusivity** i.e. being inclusive of large businesses and SMEs, entrepreneurs and workers, the youth/new entrants to the industry and community-led and top-down interventions.
- + **Linkages with other industry sectors and products** and how to provide support to, and link with, cultural and creative industries.

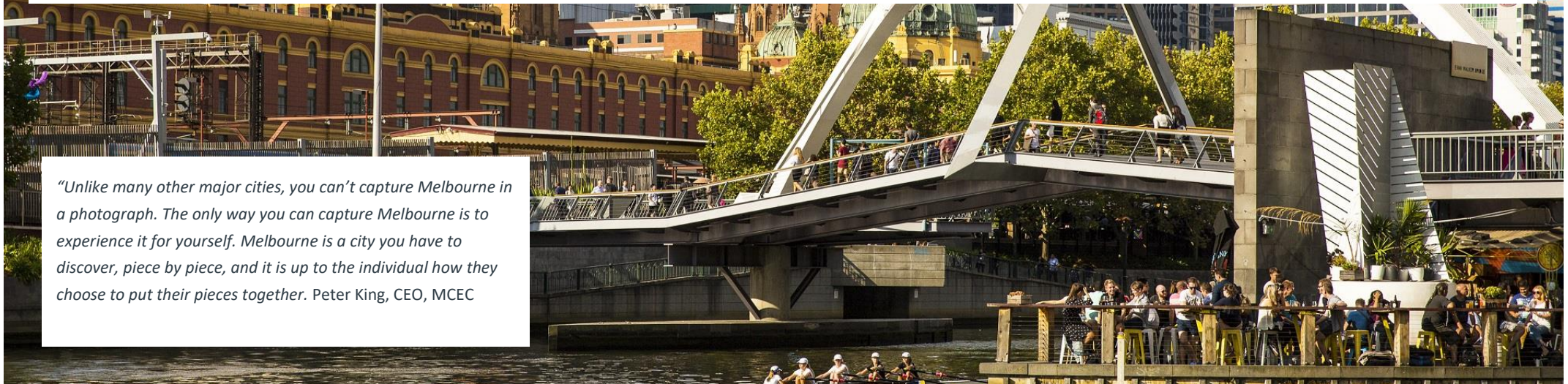
**It is therefore recognised that the future success of Greater Melbourne's visitor economy will depend on a bold, long-term vision that is funded, relevant and will generate employment opportunities with cross-sector economic benefits. It will also require a cohesive partnership approach to improve public and private sector dialogue, strengthen relationships, and improve tourism linkages across Greater Melbourne. Viewing Greater Melbourne as one tourism region requires extensive coordination, cooperation and consideration of needs as to how this can be achieved. It will also ensure that strategies are not restricted to council boundaries.**



# Greater Melbourne Today



*"Unlike many other major cities, you can't capture Melbourne in a photograph. The only way you can capture Melbourne is to experience it for yourself. Melbourne is a city you have to discover, piece by piece, and it is up to the individual how they choose to put their pieces together. Peter King, CEO, MCEC"*



# Greater Melbourne Destination Management Visitor Plan

## PLACE

For the purposes of this DMVP, Greater Melbourne has been divided into five sub-regions namely: Melbourne's East, Inner Melbourne (including the CBD), Melbourne's North, Melbourne's South East and Melbourne's West. Visitor gateways and hubs are associated with Melbourne's North (Melbourne Airport) and Inner Melbourne (Station Pier cruise terminal at Port Phillip). Flinders Street and Southern Cross stations in the CBD connect the CBD with regional Victoria. From a visitation viewpoint, Inner Melbourne attracts the largest share of tourists (51% of all visitors in 2016-17 (TRA, 2017)).

### Greater Melbourne as a Tourism Region?

In many ways, focusing on Greater Melbourne as one tourism region provides a catalyst for tourism growth greater than under its current form, which is predominately focused on the CBD and immediate surrounds. Whilst the CBD has an abundance of attractions and experience offerings for visitors, which are worth visiting in their own right, the contrasts and diversity offered by Greater Melbourne has potential to:

- + increase dispersal across the region and thereby create integration
- + expand the marketplace to attract more interstate and international visitors
- + lift existing council and sub-regional visions and development plans
- + develop deeper and coherent stories about the region
- + strengthen the sense of belonging to the region
- + create better experiences and tourism products for Melburnians and tourists.

Viewing Greater Melbourne as one tourism region is not without challenges. It must be able to reach across differences and formulate a collaborative road map for the future, where people increasingly experience a genuine sense of regional belonging. It must also be able to formulate ways of connecting the metropolitan region into an attractive tourism product that meets the increased demand for such combined experiences.

## GREATER MELBOURNE'S TOURISM PRECINCTS

### Tourism Precincts

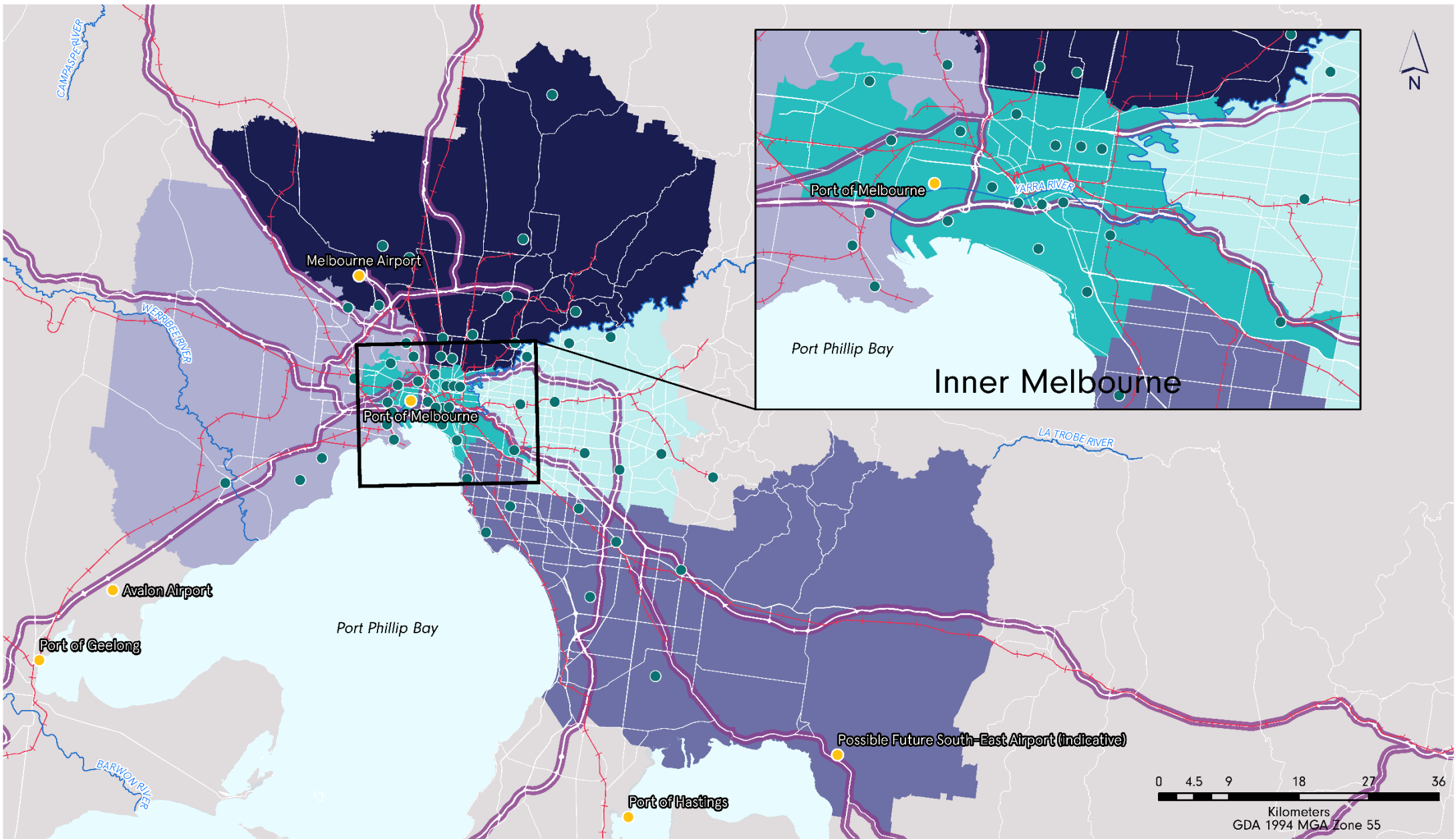
For the purposes of this plan, a tourism precinct is defined as: *a distinctive geographic area within a larger urban area, characterised by a concentration of tourist-related land uses, activities and visitation, with fairly definable boundaries.* (Griffin, 2009)

**In common with other international cities, tourism in Greater Melbourne (particularly in the CBD and immediate surrounds) is concentrated into discrete tourism precincts, each with its own unique character. Some of these precincts are more developed than others; some have great potential but have not yet established their competitive positioning, whilst others are well-established and may require rejuvenation in the years to come.**

Regardless of their stage of development, all tourism precincts in Greater Melbourne are not evenly dispersed. Instead, they are concentrated into relatively small, quite distinctive geographic areas - precincts - with tourists moving between these precincts in search of the city's highlights. This has significantly positive impacts for the future development and promotion of Greater Melbourne in so far as it connects various places and spaces based on individual travel preferences, encourages dispersal, fosters strategic event planning, and encourages visitors to look beyond current hotspots and go off the beaten track more often.

**The future of Melbourne's tourism precincts will be largely influenced by the growth of satellite business centres and national employment innovation clusters (e.g. Box Hill as a second CBD) and the establishment and expansion of clusters in Parkville, Monash and Dandenong South, La Trobe, Sunshine and East Werribee.**





# Greater Melbourne Destination Management Visitor Plan

## VISITABILITY

In 2011, when Melbourne was first named the world's 'most liveable city', discussions commenced about what would be required for Melbourne to be recognised as the world's '*most visitable city*'. From this came the term '**visitability**' – a five pillar concept which is focused on improving the critical services at every point of the visitor journey in Melbourne and across Victoria (DM, 2017). Five key factors: sense of welcome, transport, inclusivity, technology and communication are viewed as having a significant impact on creating positive visitor experiences and help to guide businesses in their delivery of these experiences. This DMVP represents an opportunity to strengthen integrated networks to support visitability even further.

The program is led by representatives from Destination Melbourne, the City of Melbourne, Visit Victoria, Transport for Victoria, Victoria Tourism Industry Council, the Professional Tour Guides Association, Travellers Aid Australia and the Committee for Melbourne.

Sense of Welcome	Transport	Inclusivity	Technology	Communication
<ul style="list-style-type: none"><li>•This concerns creating engaging first impressions. that a visitor receives of a destination, service or product, across all touchpoints. It's working towards ensuring that visitors feel highly valued in a warm, friendly and personalised manner.</li><li>•Examples include:<ul style="list-style-type: none"><li>•St Kilda Vistor Info Kombi services the mobile and event based visitor information needs of St Kilda and the City of Port Phillip.</li><li>•City of Melbourne's Red Coat Ambassadors</li></ul></li></ul>	<ul style="list-style-type: none"><li>•This involves advocating for transport networks, including public transport systems, to keep visitors' needs top of mind when delivering products and services,. It's working towards networks being easy and safe to navigate and that route and fare information can be easily found.</li><li>•Examples include:<ul style="list-style-type: none"><li>•Transport for Victoria and its agencies have developed strong working relationships with industry and local government to enhance integrated services, passenger information, access to ticketing and connectivity within Greater Melbourne.</li></ul></li></ul>	<ul style="list-style-type: none"><li>•The importance of inclusiveness provides tourism operators with a compelling business case for making Victoria's visitor industry more accessible and inclusive to all travellers.</li><li>•Examples include:<ul style="list-style-type: none"><li>•Hobsons Bay beaches have made it easier for people with a disability and their families to enjoy the beach spontaneously.</li><li>•Museum Victoria provides greater access and support for visitors with autism to enjoy their experience.</li><li>•Moonlit Sanctuary have made it easier for as many people in wheelchairs as possible to visit this 25 acre zoo.</li></ul></li></ul>	<ul style="list-style-type: none"><li>•This is about ensuring that businesses are visible online, and are using up to date technology.</li><li>•Examples include:<ul style="list-style-type: none"><li>•Pullman Hotels Melbourne have enhanced visitors' experience by providing superior connectivity.</li><li>•Sea Life Melbourne Aquarium has rolled-out iBeacon technology for more interactive visitor experiences.</li><li>•Melbourne Convention &amp; Exhibition Centre, through implementing extensive improvements to their digital infrastructure and using up-to-speed technology, MCEC has cemented itself as a leader in this space.</li></ul></li></ul>	<ul style="list-style-type: none"><li>•Communication aims to ensure that visitors receive consistent messaging and information from all aspects of their visit to provide a seamless experience. This factor is focused on three elements in particular; maps, signage and way finding, printed and online products and integrated messaging, for example the Official visitors guide and Wayfinding projects.</li><li>•Examples include:<ul style="list-style-type: none"><li>•Skybus has an integrated communications approach across all of their services to ensure they engage their customers with timely and relevant information.</li></ul></li></ul>

## SUPPORTING TRANSPORT INFRASTRUCTURE

Modern, efficient infrastructure that connects people and places is at the heart of any thriving economy and society. Melbourne's ranking as the world's most liveable city in part reflects the significant benefits that stem from well thought out, long term infrastructure planning. Several major 'once in a generation' transport and precinct infrastructure projects are currently underway.

- + At present, Melbourne Airport connects visitors to the CBD via the fare-based SkyBus, taxi and Uber services. The possibility of an airport rail-air link between the Airport to the CBD has been a topic of much debate over the past decade. Recent media announcements indicate that both the Commonwealth and State Governments have individually committed funding to undertake feasibility studies for the future development of the Melbourne Airport Rail Link. Scope also exists to link Avalon Airport to the city via rail.
- + There are several major road projects taking place within Greater Melbourne at present including: Monash Freeway Upgrade, CityLink Tulla Widening, M80 ring road upgrade and the West Gate Tunnel Project to offer a new gateway entry to the city from the West. These upgrades aim to relieve road congestion and provide better transport connections for Victorians and visitors.
- + The Melbourne Metro Rail Project (marketed as the Metro Tunnel) is a \$10.9 billion metropolitan rail infrastructure project currently under construction and due for completion in 2026. The project will increase capacity and transform the rail network from a commuter-style suburban rail system to a metro-style rapid transit system, with five new underground stations, freeing up space in the City Loop to run more trains, more often to the suburbs.
- + Over the next eight years the Level Crossing Removal Authority will oversee the removal of 50 dangerous and congested level crossings across Greater Melbourne. This initiative will improve safety and travel times for all modes of transport around Melbourne.

## Managing Transport Improvements

Large scale road and rail infrastructure projects whilst delivering improvements for visitors in the long-term, are also travel disruptors in the short-term and as such, have an impact on visitor journeys throughout Greater Melbourne.

Whilst Transport for Victoria mitigates disruption for all transport users, strategies to mitigate the impact of improvement works on visitors could also include:

- + More customer service on the ground providing accurate and personalised travel information in around key construction hotspots.
- + Use digital platforms and push notifications informing travellers and locals of potential disruptions and alternative routes and modes of transportation.
- + Create digital billboards at key hotspots to provide visual concepts of how infrastructure improvements will improve accessibility and connectivity in and around Greater Melbourne.
- + Encourage customer service staff across transport to be proactive in their role as visitor ambassadors.
- + Ensure signage is accurate suggesting alternative (shorter) routes and where possible encourage active transport (walking and cycling) to a destination instead.
- + Where possible, advocate for construction works outside of peak hours and major events.
- + Encourage activation of the Yarra and Maribyrnong rivers as alternative modes of transport for visitors.



# Greater Melbourne Destination Management Visitor Plan

## EXISTING VISITOR INFRASTRUCTURE & EXPERIENCES: KEY HIGHLIGHTS

Greater Melbourne	4 Airports Melbourne International Essendon Airport Moorabbin Airport Avalon Airport	1 cruise terminal Station Pier welcomed 280,202 cruise passengers in 2016/17	Metro rail 965km of rail track 14,000 services weekly 15 train lines	Tram network 250km of track 24 routes with 1,763 stops Free CBD tram zone Weekend night network	2 rivers Maribyrnong River Yarra River	Melbourne Convention & Exhibition Centre largest in southern hemisphere
	5 Major Stadiums MGC, Marvel Stadium, Hisense Arena, Rod Laver Arena, AAMI Park,	Horse racing tracks Flemington Racecourse, Moonee Valley, Caulfield, Sandown	4 Motor racing tracks Albert Park, Sandown International Motor Raceway, Calder Park & Avalon Raceway	7 Universities	World Heritage Status UNESCO City of Literature UNESCO World Heritage Site, Carlton Gardens	Over 180 different nationalities represented in Greater Melbourne
Inner Melbourne	Highest number of live music venues per capita in the world	Highest number of commercial galleries in the world	Highest number of restaurants per capita in the world	Melbourne Comedy Festival the world's 3rd largest comedy festival	Queen Victoria Market is the oldest in Australia	Chinatown Melbourne is the largest continuous Chinese settlement in the western world
Melbourne's East	Strong Asian-fusion cuisine in Box Hill	Chadstone shopping centre is the largest in the southern hemisphere	Oldest artist community in Australia: Montsalvat	Heide Museum of Modern Art: birthplace of Australian Impressionist Art	First place of gold discovery in Victoria: Warrandyte	Gateway to the Yarra Valley
Melbourne's South East	Strong Indian, Afghani, Africa, South-East Asian and Polish cuisine in Dandenong & Springvale	Brighton Bathing Boxes are one of the most photographed icons in Australia	Dinosaur fossils	Royal Brighton Yacht Club is home to national and international events	Royal Melbourne Golf Course is one of the top 10 golf courses in the world	Moorabbin Airport is the largest commercial flight training centre in Asia- Pacific
Melbourne's West	Strong Vietnamese cuisine in Footscary, Sunshine & St Albans	Flemington Race Track is host to the high profile Spring Racing Carnival along with Moonee Valley	RAMSAR internationally recognised wetland site with largest diversity of birdlife outside Kakadu National Park	Wide range of urban wineries and craft breweries	Strong maritime history in Williamstown and Seaworks, complemented by West Bay coastline.	Werribee Open Range Zoo & Werribee Mansion
Melbourne's North	Mix of high end, Italian and Middle Eastern cuisine	Sunbury - oldest wine region in Victoria	Emu Bottom, oldest homestead in Australia	CERES is internationally renowned for environmental sustainability	Funfields Theme Park	Only Islamic Museum in Australia

## WHY DO PEOPLE VISIT GREATER MELBOURNE?

Greater Melbourne is well renowned as the most liveable and one of the best student cities in the world. It is a truly multicultural destination / global village with welcoming people and a creative society.

**Melbourne is not an ordinary city: Unlike many other cities that can be admired for their natural beauty or grand monuments, it is Melbourne's fine grain experiences and stories which must be "experienced" to be appreciated (City of Melbourne Marketing, 2013).**

Melbourne is frequently dubbed the events, sports and arts and cultural capital of Australia and competes on the world stage of culinary excellence; it is well-known for its parks and gardens, laneways, shopping, markets and is fast-emerging as a fashion and design capital. It has a strong Victorian architectural influence unlike any other city in Australia and has an industrial and maritime past which is now started to slowly be embraced and showcased as part of its rich heritage. It has an abundance of attractions and tourism precincts to suit all traveller types and is on the doorstep to some of the best wine regions, spectacular coastline and Australian icons. It is for all these reasons and others, of course that makes visitors to Melbourne keep coming back to discover more.

Above all, and perhaps most importantly, it has to do with the fact that no other Australian city is as adept as Melbourne at combining disparate elements to create something new: taking the familiar and marrying it to the unknown; and merging people's expectations to moments of spontaneity.

Clearly, the attraction of Melbourne is not any one iconic experience – it is a combination of experiences; and it is the passion that exudes from Melburnians, their support for new events, places and space, and their enthusiasm encountered along all touchpoints along the visitor journey that gives it soul.

## GREATER MELBOURNE'S CONTRIBUTION TO TOURISM

**Greater Melbourne brings together more diversity than any other single tourism region in Victoria. Although each Local Government has its own distinct tourism offering, and each is at a different stage in its visitor economy lifecycle, cumulatively, these differences provide visitors with an opportunity to create multi-dimensional experiences to suit their travel preferences.**

In this DMVP, tourism is a strategic asset for growth and development. In other words, tourism creates more than hotel nights and turnover within the core of the tourism industry. It creates jobs, international awareness, networks and a basis for strategic infrastructure such as airports, sports arenas and convention centres. Within the context of this DMVP it is important that tourism is understood as a value chain product linking numerous business sectors together in order to deliver a comprehensive tourism product to the visitor. Tourism is the only completely destination bound industry, since it can't be outsourced or moved elsewhere. It's also an industry returning GST and other taxes directly to the tourism destination.

Tourism is a significant economic driver for Melbourne. In 2015-16, tourism was estimated to be worth \$15.3 billion to the region's economy (in GRP) and generated employment of approximately 126,800 people (6.0 per cent of the region's employment). To put this in perspective, Victoria's visitor economy generates \$21.3 billion each year and employs in excess of 195,700 people and supports thousands of businesses, both directly and indirectly (DEDJTR, 2017a & 2017b).

## GREATER MELBOURNE'S TOURISM PRODUCT PILLARS

### Food & Beverage

- Melbourne is globally recognised for its high-quality food and wine scene, craft breweries, coffee culture and rooftop bars. The eclectic mix and cultural diversity of the local residents has created pockets of authentic culinary excellence.
- As host to the World's 50 Best Restaurants in May 2017 – an event that has not been held outside New York or London until 2017, testament to Melbourne's strength in gastronomic experiences.

### Arts, Culture, Museums & Theatres

- With the world's highest density of commercial galleries, Melbourne is home to a thriving arts scene and boasts more than 100 galleries ranging from large public institutions to smaller commercial galleries and artist run initiatives. Federation Square is home to the Ian Potter Centre: NGV Australia – the world's first major public gallery dedicated to Australian art. Further afield Herring Island in South Yarra, the Heide Museum of Modern Art in Bulleen both provide outdoor art experiences and sculpture gardens. There are also numerous art spaces including the Footscray Community Arts Centre, the Substation Newport and Incinerator Gallery.
- There are several world-class museums including Melbourne Museum, Immigration Museum and the Shrine of Remembrance.
- Melbourne CBD is home to multiple theatres which are often the first in Australia to welcome shows straight from London's West End and New York's Broadway. This is complemented by several theatres located outside the CBD including the Palais Theatre, National Theatre, Drum Theatre, Clocktower Centre, Wyndham Cultural Centre, Thornbury Theatre and Banyule Theatre Complex.

### Sport

- Melbourne is well-recognised as the sporting capital of Australia and in 2016 was recognised at the *Sport Business Ultimate Sport City of the Decade*.
- World class venues such as the Melbourne Cricket Ground and Melbourne Park play host to international cricket the AFL Grand Final and Australian Tennis Open each year. Other venues such as Albert Park host the Formula 1 Australian Grand Prix and Flemington Racecourse which host the Spring Racing Carnival and Melbourne Cup "race that stops the nation", there is something for every sports fan.
- Melbourne has more AFL teams than other Australian State and is home to some of the best golf courses in the world (e.g. Royal Melbourne Golf Course). The Royal Yacht Club of Victoria, founded in 1853, is one of several active clubs around Port Phillip Bay and plays host to several national and international sailing events throughout the year.

### Major Attractions

- Queen Victoria Market
- Eureka Skydeck
- Melbourne Zoo
- Federation Square
- Arts Centre Melbourne
- State Library of Victoria
- Royal Botanic Gardens Victoria
- Shrine of Remembrance
- Crown Entertainment Precinct
- Melbourne Cricket Ground
- National Gallery of Victoria
- Melbourne Museum
- Sea Life Melbourne Aquarium
- Old Melbourne Gaol
- Melbourne Star Observation Wheel
- Koorie Heritage Trust
- ACMI
- Docklands
- Scienceworks
- Werribee Open Range Zoo
- Puffing Billy Railway
- Heide Museum of Modern Art
- Healesville Sanctuary
- Abbotsford Convent

## Events & Festivals

- Leisure events: Melbourne is dubbed the events capital of Australia for good reason. Blockbuster events are plentiful, with events such as the Melbourne Fashion Festival, Melbourne Food & Wine Festival, Melbourne Festival, Melbourne International Comedy Festival, Melbourne International Film Festival, White Night and Chinese New Year Festival.
- Melbourne has also played host to Cricket's World Cup, the Commonwealth Games, Asian Cup soccer and international friendlies, the Presidents Cup [golf] and Australian Masters Golf, UCI Road and Track Cycling Championships and FIFA World Cup qualifiers, 2017 Rugby League World Cup and World Cup of Golf.
- Business events: By 2017 FY, Melbourne Convention and Exhibition Centre (MCEC) hosted 1,026 events, which contributed \$969.1 million to the Melbourne local economy. In 2016/17 Melbourne Convention Bureau secured 194 events across incentives and corporate meetings worth \$321 million and are expected to attract 69,000 delegates. MCB also attracted the first C2 business conference to be held outside of Montreal to Melbourne.

## Parks & Gardens

- Melbourne is considered to be Australia's garden city, and Victoria is well-known as the Garden State.
- There is an abundance of parks and gardens close to the CBD including Royal Botanic Gardens and Kings Domain.
- Outside the CBD there are several and notable parks, gardens and national parks and areas of environmental significance, including, amongst others: Royal Botanic Gardens Cranbourne, Bulleen Park, Organ Pipes National Park, Derrimut Grassland Reserve, Warrandyte State Park, Churchill National Park, Cheetham Wetlands, Victorian Volcanic Plains, Point Cook Coastal Park, Werribee Park and heritage listed Williamstown Botanic Gardens (one of the first public gardens in Victoria).

## Fashion, Shopping & Markets

- Queen Victoria Market in the heart of Melbourne is one of the oldest markets in Australia and is the most visited attraction in Victoria, drawing in 10 million visitors each year. Each sub-region has its own market which showcases the cultural influences of its residents.
- Melbourne has a growing retail scene encompassing all ends of the fashion spectrum from vintage to edgy and high-end and from home-grown designers and boutiques to international brands.
- Little Collins Street and Flinders Lane in the CBD and Fitzroy, Brunswick Street, Gertrude Street and Chapel Street are hotspots amongst locals and visitors alike.
- Other large regional retail precincts such as Chadstone and Eastland Shopping Centres have been recently upgraded to further enhance the retail offering of Greater Melbourne.

## Laneways, Trams & Architecture

- Melbourne's iconic tram network is the largest in the world.
- Melbourne's historic urban environment is full of life. Visitors can spend hours exploring the city's beautiful arcades, one-off boutiques, eclectic laneways, street art and Victoria era inner city housing and architecture.
- There is something for everyone with Victorian landmarks such as the State Library of Victoria, St Patrick's Cathedral, St Paul's Cathedral and Flinders Street Station and Manchester Unity Art Deco Building all being representative of the CBDs iconic landmarks. Melbourne Exhibition Buildings are World Heritage listed. The Brighton Bathing Boxes in Melbourne's South East are also iconic landmarks, with high heritage value.



## VISITOR ACCOMMODATION

As a global city, Melbourne has a range of accommodation types suitable for the modern traveller ranging from backpacker hostels through to B&Bs, serviced apartments in internationally branded hotels.

There are over 26,800 serviced rooms in 334 establishments of 15+ rooms located in Greater Melbourne. Given the number of visitor nights generated by visitors to Greater Melbourne (77.1 million nights), it is estimated that significantly more accommodation is available on a private rental agreement basis.

Amongst the Airbnb market, there are over 7,780 active listings with over 11,000 bedrooms. Inner Melbourne accounts for around 85% of all active Airbnb active listings.

Inner Melbourne accounts for 95% (25,610 rooms) of the total serviced accommodation available in Greater Melbourne. It also benefits from the highest representation of four and five-star hotels and the greatest presence of internationally branded operators. Beyond Inner Melbourne, there is currently a limited supply of accommodation and low levels of international hotel brand representation across all regions.

It will be particularly important to attract known global brands to Greater Melbourne as it is thought that loyal brand users (particularly corporate market) are returning to inner Melbourne daily to use trusted hotel brands. Investment in the serviced accommodation market is therefore required to grow overnight visitation outside of the CBD, spread economic benefits and increase dispersal.

Establishments > 15  
rooms  
334 with 26,813 rooms

Ave room occupancy  
83.4% (YE Dec 17)

Ave Daily Rate  
\$185.13 (Dec 17)

RevPAR  
\$154.46 (Dec 17)

AirBnB  
7,780 active listings  
Median occupancy = 49%

9,000 hotel rooms in  
pipeline

Source: ABS (2017), AirDNA (2018)

Given the importance of hotel loyalty programs and the trust and reliance consumers have on international brands, there is a high probability that business and other travellers visit regional Melbourne and then travel back to Inner Melbourne to stay in trusted accommodation which are associated with loyalty program recognition and benefits.

The case for future investment in the hotel sector appears strong: the regions are rich in tourism products, have a high student population (which is a key generator of VFR-related tourism) and have a high presence of national and international corporates.

Whilst other Australian capital cities have experienced a recent surge in hotel development, Melbourne has displayed constant growth in room supply over the past decade and there is little sign of a slowdown, with over 5,000 rooms under construction or planned over the next four years to 2021.

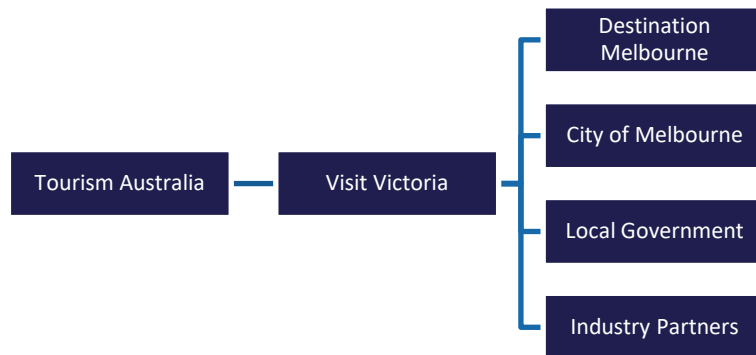
New hotel developments range from luxury international brand names (such as W, Four Points by Sheraton, Shangri-La and Ritz Carlton hotels) to intimate boutique hotels traversing a vast range of styles and price points. This strong pipeline counters any arguments for additional stock by unregulated commercial short-term accommodation operators, who have exploited grey legislative areas to establish quasi hotels in the CBD and other tourist hot-spots.

Although much of the hotel development activity has gravitated in and around the CBD, the adjacent sub-regional areas are also experiencing a surge in activity. Smaller in scale but just as dynamic, the development of the Sage Hotel in Ringwood, Quest in Dandenong, Hyatt Place in Essendon Fields, Aloft in South Yarra, Ebony All Suite Hotel in St Kilda and the Art Series Hotel (The Chen) in Box Hill are just a few examples of the expansion of the serviced accommodation market beyond the CBD.

# Greater Melbourne Destination Management Visitor Plan

## MARKETING MELBOURNE

Marketing Melbourne as a tourism destination is influenced at several levels: at a national level by Tourism Australia, at a State level by Visit Victoria and at a regional level by Destination Melbourne. These entities are supported by local governments through their own websites and visitor information centres and industry partners including, Melbourne Convention Bureau, Melbourne Airport, Tourism Accommodation Australia (VIC), and individual visitor attractions.



### Visit Victoria

Visit Victoria is first and foremost responsible for marketing Melbourne and Victoria to visitors from within the state, across Australia and around the world to increase visitation, yield and ensure the future growth of Victoria's visitor economy. Visit Victoria works in conjunction with the Victorian Government, Regional Tourism Boards, industry and commercial partners to create and implement innovative and effective campaigns that position Melbourne and Victoria as a distinctive and compelling tourism destination.

### Destination Melbourne

Destination Melbourne (an independent not-for-profit tourism organisation) works with Greater Melbourne's visitor industry to promote tourism products and experiences in Greater Melbourne. Destination Melbourne produces a quarterly *Official Visitor Guide* (English & Chinese) and annual *Official Melbourne Visitor Map* which encourage visitors to explore and disperse across Melbourne. The organisation is also focused on inspiring Regional Victorians to travel to Melbourne on a frequent

basis via its integrated *Melbourne Now* marketing campaign and it has developed an unique local engagement campaign *Discover your own Backyard* to reach the visiting friends and relatives market.

### City of Melbourne

The City of Melbourne local government has taken a lead role in providing information to visitors both through its website and visitor servicing via its tourism volunteers program which covers: City Ambassadors; Melbourne Visitor Booth in Bourke Street Mall; Melbourne Visitor Centre at Federation Square; Fitzroy Gardens Precinct (Fitzroy Gardens Visitor Centre and Cooks' Cottage); Hamer Hall (Arts Centre Melbourne) and Southern Cross Station. The City also has produced a *Melbourne City Marketing Strategy 2013-16* which aims to use the City of Melbourne's strengths and inspire Melburnians to make the city and its neighbourhoods their destination of choice and the *City of Melbourne Tourism Action Plan: 2016-2019*.

### Collaborative Marketing Partnership Effort

In addition, to the marketing and branding undertaken by Visit Victoria, City of Melbourne and Destination Melbourne, several industry organisations and local councils also undertake their own branding to promote Melbourne.

This has created a somewhat fragmented and geographically (rather than visitor) focused approach, to the point where a more collaborative and coordinated, visitor centric approach with much improved communications between State, private, not-for-profit and local council entities is required. As it stands, not only is there confusion over roles and responsibilities amongst the industry but there is an inevitable duplication of effort and sub-optimal use of limited resources and funding.

In addition, there is a perception amongst key industry stakeholders that current marketing efforts for Melbourne is city-centric and falls short of marketing the tourism assets and experiences of the outer metropolitan areas. There is also the view that the disparities in funding for Melbourne City and Regional Victoria, with outer Melbourne being somewhat "left out"; colloquially referred to as the "donut effect".

A partnership approach to marketing Greater Melbourne could therefore serve to mitigate these issues, and would enable a more inclusive, proactive and dynamic approach to be undertaken.

## DESTINATION PERFORMANCE 2016-17

### Insights

- + Since 2005 there has been an upward trend in the number of day visitors who travel to more than a 50km round trip to engage in the tourism offering available in Greater Melbourne. In comparison, domestic overnight (both Interstate and Intrastate) and International visitors have been relatively stable over time with a recent small upward trend in all three over the last five years.
- + Overall, global economic conditions remain favourably orientated for Australian tourism, and as such, Greater Melbourne is expected to benefit. Whilst China, New Zealand and the UK are likely to continue to underpin the international visitor market volume, growth in visitors from India, Malaysia and Singapore are expected to exhibit the greatest level of growth.
- + Whilst the pace of growth amongst the domestic day and overnight markets has softened from the record highs recorded in 2012, demand from the domestic intrastate has grown recently fueled by growth in staycations (i.e. holidaying at home). Although average spend by domestic travelers has remained stable, the increase in trips has translated into aggregate growth in visitor expenditure.
- + Future outlook is strong, with average growth over the next five years being projected to outpace Sydney (at 4.9%) Strongest growth is expected to take place within the VFR at 5.6% average growth over the next five years, with the traditional holiday and business markets growing at a slower rate (yet still buoyant) at 4.3% and 3.5%. (TRA, 2017c).



### Total visitors: 29.3 million

60% day visitors  
12% intrastate domestic overnight  
19% interstate domestic overnight  
9% international



### Average length of stay

7.3 nights

3.2 nights (interstate)  
1.9 nights (intrastate)  
22.8 nights (international)



### Number of Nights

85.1 million

8% intrastate domestic  
21% interstate domestic  
71% international



### Purpose of visit

37% Holiday  
33% VFR  
16% Business  
13% other



### Top International Visitors

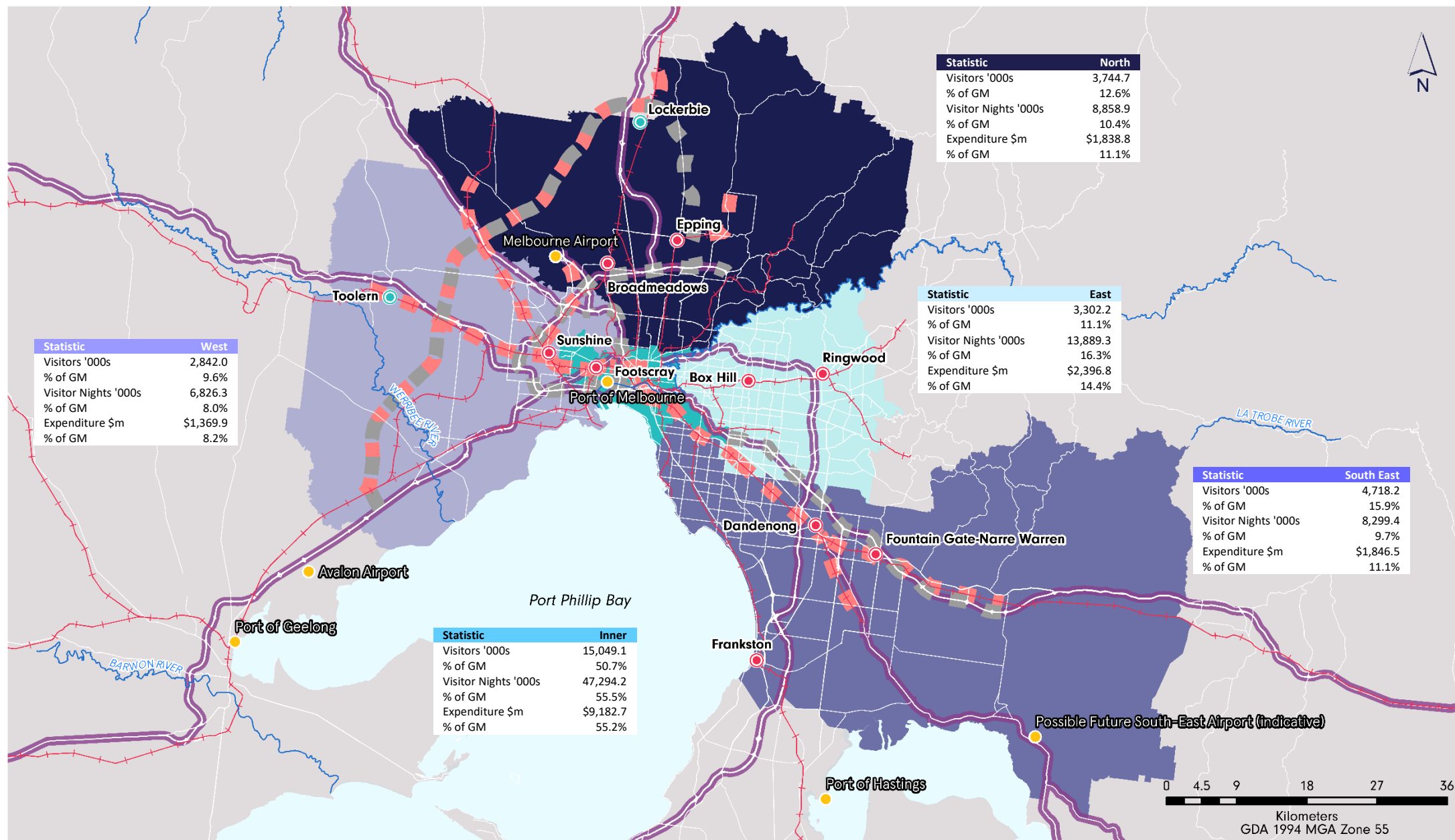
1. China (21%)
2. New Zealand (12%)
3. UK (8%)
4. USA (8%)



### Types of Activities

1. Social (61%)
2. Arts & heritage (8%)
3. Outdoor/nature (8%)

Source: TRA (2017a & 2017b 2016-17)



## Legend

- Existing Metro Activity Centre
- Future Metro Activity Centre
- Airport/Seaport
- Rail Network
- Watercourse
- Key Transport Corridor
- Main Road Network
- Rail Initiative
- Road Initiative
- Sub-region North
- Sub-region Inner
- Sub-region Southeast
- Sub-region East
- Sub-region West



**Notes:**

Airport/Seaport: © DELWP - Plan Melbourne 2017  
 Main Road Network: © DELWP - VicMap Transport 2017  
 Rail Network: © PTV Public Transport 2017  
 Key Transport Corridor: © DELWP - Plan Melbourne 2017  
 Sub-region: © DELWP - VicMap Admin 2017 & AEC 2017  
 Rail and Road Initiative: © DELWP 2017  
 Watercourse: © DELWP 2017

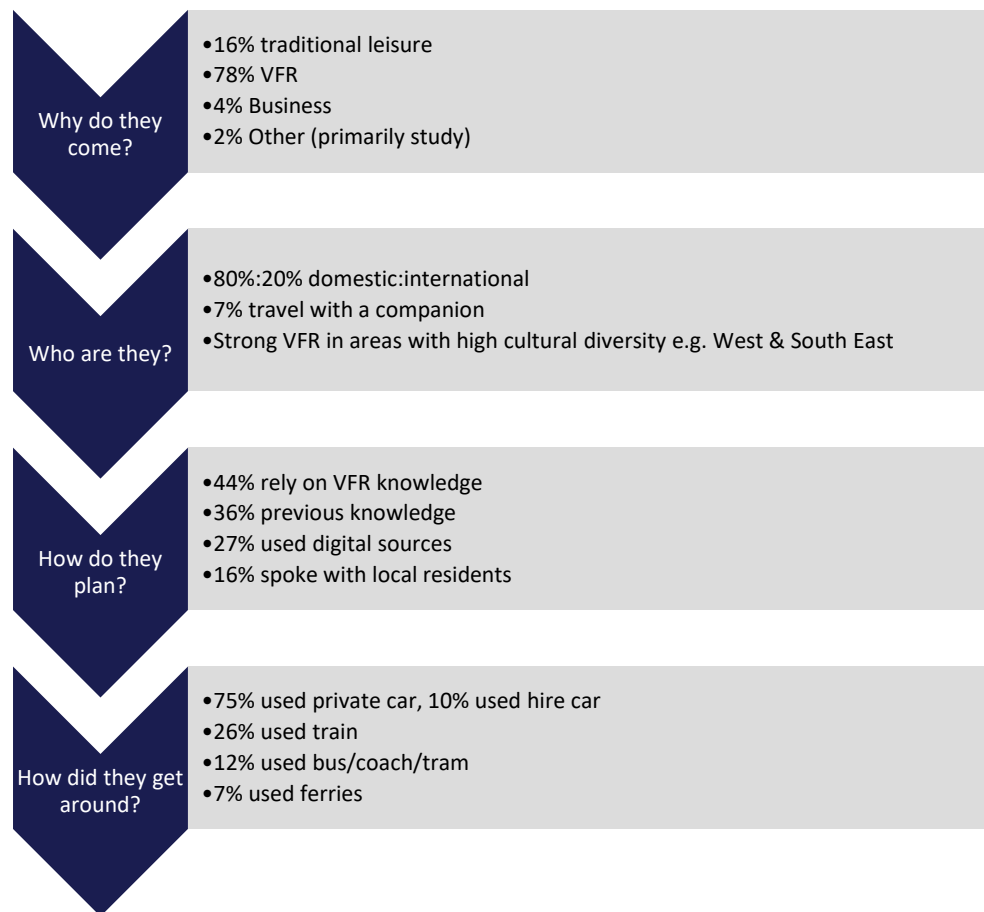


# Greater Melbourne Destination Management Visitor Plan

## VISITOR PERCEPTIONS

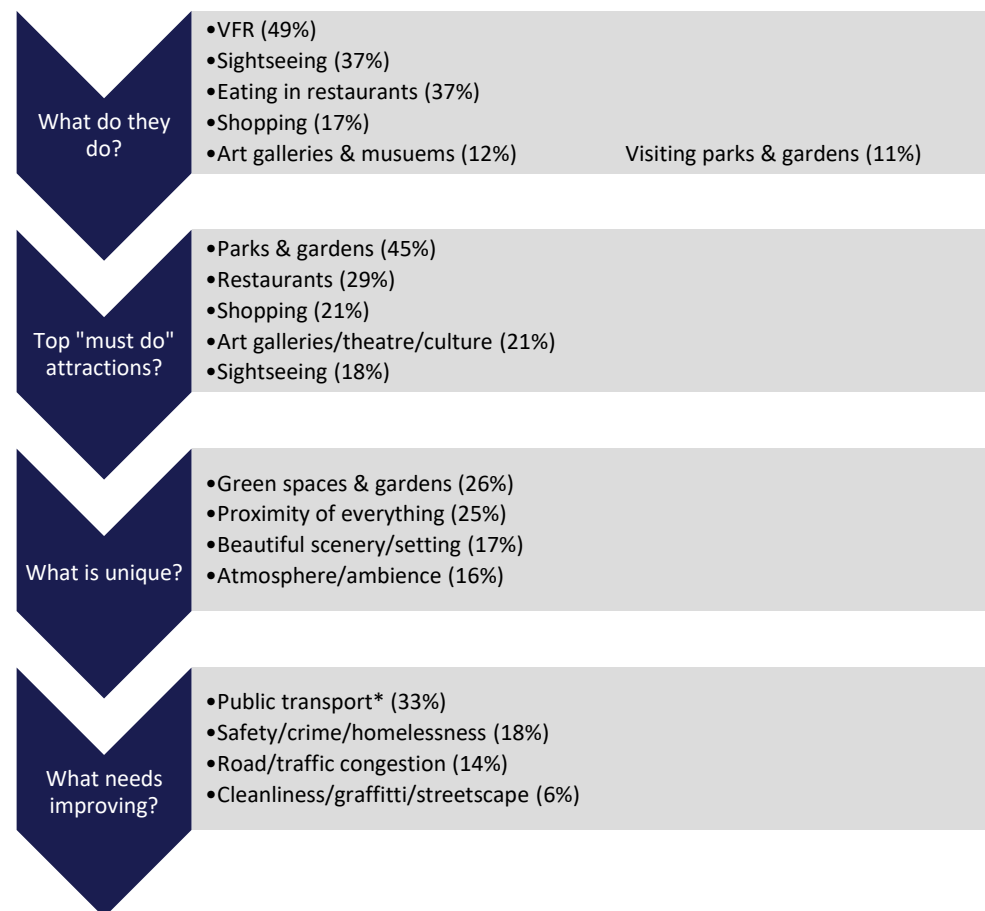
A total of 2,572 visitor perception intercept surveys were undertaken with domestic and international leisure and business visitors at several locations in the sub-regions during May and June 2017. Key results and implications for the future direction of Greater Melbourne's visitor economy are presented below.

### PRE-TRIP & ARRIVAL



Source: AEC

### DURING TRIP & PRE-DEPARTURE



Note: \* Includes simplified myki communications, increased awareness of integration and connectivity across transport, in particular connections between the east and west.

Source: AEC

## Pre-Trip & Arrival Perceptions - Implications for the future

- + As one of the fastest growing cities in Australia, VFR related visitation to Greater Melbourne is poised to increase significantly over the next decade.
- + High levels of engagement with VFR and local residents suggests that scope exists to encourage and empower Melbournians to improve their knowledge (and access to information) so that they can become advocates for tourists.
- + Improvements in digital capabilities are required to capitalise on knowledge searches using digital platforms.

## During Trip and Pre-Departure Perceptions - Implications for the future

- + Opportunities exist to further promote restaurants and cafes and parks, gardens, and natural landscapes. These seem to be both unique and high quality and would differentiate Greater Melbourne from other destinations.
- + Improvements in internet connectivity and cell phone access are critical to ensure that Greater Melbourne is prepared for modern travellers and offer globally competitive visitor experiences.
- + Wayfinding and information provision that enhances visitor experiences is required to satisfy visitor desires to explore regions on foot.
- + Limited requirement for investment in new physical attractions.

## SWOT ANALYSIS

In framing the DMVP the following key strengths, weaknesses, opportunities and threats facing the Greater Melbourne visitor offering have been identified. The SWOT analysis has been divided into three main clusters (tourism product/destination, infrastructure, intraregional issues) with the purpose of highlighting strategic priority for future development.

### Strengths

#### Tourism product/destination

- High diversity of arts, culinary, sport, cultural and authentic tourism products.
- Great diversity and wealth of tourism resources in a manageable space.
- National leaders in sport, culture and the arts.
- Friendly and welcoming city delivered through multi-cultural diversity.
- High level of repeat visitation.
- Internationally recognised universities throughout Greater Melbourne.
- Growing cruise industry.
- Safe destination.
- Repeatedly accoladed as the world's most liveable city.
- Ranked amongst top five Best Student cities in the world.
- Large and growing creative arts industry.

#### Infrastructure

- Only 24/7 curfew-free capital city airport & good connections with key source markets.

#### Intraregional issues

- Ongoing capital investments in tourism infrastructure across Melbourne city centre.
- Continuous improvements in road, rail and tram infrastructure.
- Walking and cycling trails strategy to connect the region.

### Weaknesses

#### Tourism product /destination

- Quality of visitor experiences is not consistent across Greater Melbourne.
- Tourist accommodation concentrated in Inner Melbourne.
- Limited presence of international branded hotels outside the CBD.
- No globally recognised Icon.
- Myki communications

#### Infrastructure

- Arrival at Station Pier Cruise Terminal.

#### Intraregional issues

- Hierarchy and high number of policy and planning organisations leading to duplication of efforts and dilution of funding.
- Fragmentation and lack of coordination among private and public sectors.

### Opportunities

#### Tourism product/destination

- Greater activation of Greater Melbourne's parks, gardens and national parks as attractions.
- Activate the tourism potential of the Yarra and Maribyrnong rivers and waterways.
- Develop maritime activation opportunities to strengthen linkages across the region.
- Develop Greater Melbourne's music scene by maximising use of underused intimate venues.
- Encourage internationally branded hotel investment outside the CBD.
- Create greater awareness and potentially link existing indigenous experiences together.
- Further enhancement of existing tourism precincts across the region and use food culture as the distinguishing feature where possible.
- Development of environmentally sustainable tourism as a tool for competition.

#### Infrastructure

- Improve east-west connections across the city.
- Improve awareness of integration and connectivity across transport
- Improve and simplify myki communications

#### Intraregional issues

- Greater collaboration in branding, marketing and use of digital platforms & resources
- Refine and further develop underlying information and analysis tools such as tourism GIS.
- Enhance and leverage existing mobile first digital assets to facilitate the creation of tailor made and unique visitor experiences.
- Create a business Think Tank to encourage a stronger creative and innovative approach to tourism product development.

### Threats

#### Tourism Product /destination

- Focus on short term initiatives rather than sustained support for priority projects.
- Growing competition from other Australasian city destinations.
- Sydney's status as the gateway to Australia.

#### Infrastructure

- Delays in obtaining planning approvals.
- Continued city centric approach to product investment and marketing.

#### Intraregional issues

- Lack of continuity in plans due to political changes.
- Budgetary constraints that could limit the scope of the DMVP.



# Maintaining Competitive Advantage





## GLOBAL COMPETITIVE ADVANTAGE

- + Ranked the world's most liveable city every year since 2011 by Economist Intelligence Unit<sup>3</sup>.
- + Rated in the top 10 of the world's safest cities by Economist Intelligence Unit<sup>2</sup>.
- + Ranked fifth in the world as the best student city<sup>4</sup>.
- + Ranked third in Asia-Pacific (and 12th in the world) for arts and culture (behind Tokyo and Mumbai)<sup>5</sup>.

Melbourne is the only city in the world to host a tennis grand slam and a Formula One race. In 2016, Melbourne was named Sport Business Ultimate Sport City of the Decade after being named the World's Ultimate Sports City in 2006, 2008 and 2010<sup>6</sup>.

- + Greater Melbourne is considered Australia's unofficial sporting capital and is the only city in the world with five international standard sporting facilities<sup>3</sup>.
- + Highest number of restaurants and cafes per number of people than any other city in the world<sup>7</sup>.
- + Highest number of commercial galleries in the world<sup>8</sup>.
- + National Gallery of Victoria holds the largest collection of Australian art<sup>6</sup>.
- + One of 20 UNSECO Cities of Literature and the only in Australia<sup>9</sup>.
- + Home to the highest Italian and Greek populations in the world outside their own countries<sup>8</sup>.
- + Chinatown is the longest continuous Chinese settlement in the western world<sup>8</sup>.
- + World famous sandbelt golf courses.

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<sup>3</sup> EIU (2017)

<sup>4</sup> QS (2017)

<sup>5</sup> Creative Victoria (2017)

<sup>6</sup> Sport Business (2016)

<sup>7</sup> La Trobe (2016)

## NATIONAL COMPETITIVE ADVANTAGE

- + Melbourne is recognised as cultural capital of Australia.
- + Melbourne is recognised as the sporting capital and the birthplace of AFL.
- + Well-known as the food and wine capital of Australia, with pop-up temporary or mobile hospitality retail experiences becoming characteristic of the social fabric of Greater Melbourne.
- + The Melbourne Cricket Ground (MCG) is the largest venue in Australia with a capacity of just over 100,000<sup>8</sup>.
- + Melbourne Exhibition Centre currently has the largest exhibition space in the southern hemisphere. When expanded, it will have 40,000m<sup>2</sup> of exhibition space<sup>8</sup>.
- + The Palais Theatre is the largest seated theatre in Australia<sup>8</sup>.
- + Only curfew-free capital city airport in Australia.
- + Only Australian capital city that has a true vibrant night life with all-night public transport available on weekends.
- + National leader in the creation of laneways and repurposing of unconventional spaces.
- + Greatest diversity of ethnic and cultural backgrounds of any capital city.
- + Anchored by Queen Victoria Market (the largest and oldest market in the southern hemisphere<sup>8</sup>), Greater Melbourne has more markets than other Australian capital cities.
- + The world's largest comprehensive tram network.
- + Recognised as the trend-setting capital of Australia.
- + Melbourne is both the fastest and largest population growth of all Australian capital cities<sup>10</sup>.

<sup>8</sup> Visit Victoria (2017)

<sup>9</sup> Wikipedia

<sup>10</sup> ABS (2017) 3218.0 Regional Population Growth, Australia, 2016

## GLOBAL BENCHMARKING

Three international cities: London, San Francisco and Montreal were chosen as comparisons to Greater Melbourne on the basis of their diversity of product, multiculturalism and reputation as arts, cultural, sports and event cities in their respective countries. These cities have well-established visitor economies which stretch beyond the CBD to the point where their respective metropolitan regions form an integral part of the tourism landscape. Lessons learned from the strategic direction undertaken by these international cities in the areas of destination development, destination management, destination marketing, sustainability initiatives, knowledge and innovation are also considered for application in this DMVP.

As international travel reaches 1.8 billion in 2030 (World Tourism Organisation Forecasts, 2017) one of the key challenges facing global cities is their ability to balance tourism quantity (number of visitors) with destination quality in order to maintain economic, social and environmental sustainability. The notion of preventing 'tourist overcrowding' in cities to maintain tourism sustainability, and thus maintain competitiveness, is becoming increasingly real. Given the opportunity presented by this DMVP, Greater Melbourne is therefore well-placed to focus energy and investment in areas outside the CBD in its drive to achieve sustainability of its entire visitor economy. Delivering against the principles of tourism sustainability has several advantages for Greater Melbourne:

- + Builds the case for developing tourism within distinct precincts, each with their own unique selling propositions.
- + Encourages dispersal to regional Melbourne, thereby supporting economic growth and job creation; and
- + Extends the tourism product offering available to visitors.

## London

- + **Global tourism ranking = 2<sup>11</sup>**
- + **19.88 million international visitors (2016)<sup>12</sup>**
- + **Direct tourism industry: US\$14.84 billion<sup>13</sup>**
- + **Global liveability ranking = 53<sup>14</sup>**
- + **QS Best Student Cities ranking = 1<sup>15</sup>**

London is a leading global city in the arts, commerce, education, entertainment, fashion, finance, healthcare, media, professional services, research and development, tourism, and transportation, and is one of the world's most visited cities as measured by international arrivals.

London contains four World Heritage Sites: The Tower of London; Kew Gardens; the site comprising the Palace of Westminster, Westminster Abbey, and St Margaret's Church; and the historic settlement of Greenwich. Other famous landmarks include Buckingham Palace, the London Eye, Piccadilly Circus, St Paul's Cathedral, Tower Bridge, Trafalgar Square, and The Shard.

London is home to numerous museums, galleries, libraries, sporting events, and other cultural institutions, including the British Museum, National Gallery, Natural History Museum, Tate Modern, British Library, and West End theatres. London's universities form the largest concentration of higher education institutes in Europe. In 2012, London became the first city to have hosted the modern Summer Olympic Games three times. London has a diverse range of people and cultures, and more than 300 languages are spoken in the region. Its estimated mid-2016 municipal population (corresponding to Greater London) was 8,787,892, the largest of any city in the European Union<sup>16</sup>.

<sup>11</sup> WTO (2017)

<sup>12</sup> Mastercard Worldwide (2016)

<sup>13</sup> Mastercard Worldwide (2016)

<sup>14</sup> The Economist Intelligence Unit (2017)

<sup>15</sup> QS (2018)

<sup>16</sup> City of London (2017) & London & Partners (2017)

# Greater Melbourne Destination Management Visitor Plan

## San Francisco

- + **Global tourism ranking = 33<sup>17</sup>**
- + **3.93 million international visitors (2016)<sup>18</sup>**
- + **Direct tourism industry: US\$5.93 billion<sup>19</sup>**
- + **Global liveability ranking = 49<sup>20</sup>**
- + **QS Best Student Cities ranking = 38<sup>21</sup>**

San Francisco is the seventh most visited city in the USA, and is known for its cool summers, fog, steep rolling hills, eclectic mix of architecture, and landmarks, including the Golden Gate Bridge, cable cars, the former Alcatraz Federal Penitentiary, Fisherman's Wharf, and its Chinatown district.

San Francisco is also the headquarters of five major banking institutions and various other international companies. The city's frequent portrayal in music, film, and popular culture has made the city and its landmarks recognizable worldwide. The city has a large hotel infrastructure and a world-class convention facility – The Moscone Center which is currently under further expansion. Throughout its history, San Francisco has attracted and welcomed a multitude of communities of diverse social, cultural and ethnic backgrounds. This rich history of inclusion and celebration is one of the most attractive selling points of our city. It is evident in the city's kaleidoscope of neighborhoods, which attract visitors from around the world with a variety of different tastes, interests and expectations. The city also has a proud history of supporting its various communities, most famously as a leader in the fight for LGBT equality. San Francisco Travel has promoted the city to LGBTI travelers for many decades. San Francisco is world-renowned for its opera, symphony, ballet, museums, theater companies and galleries. Food, wine and cocktail culture has grown into its own unique and lucrative segment of experience- driven travel. San Francisco's culinary reputation has thrived as a direct result of the city's diversity and its historically forward-thinking attitudes about sustainable agriculture and local sourcing.

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<sup>17</sup> WTO (2017)

<sup>18</sup> Mastercard Worldwide (2016)

<sup>19</sup> Mastercard Worldwide (2016)

<sup>20</sup> The Economist Intelligence Unit (2017)

<sup>21</sup> QS (2018)

## Montreal

- + **Global tourism ranking = 51<sup>22</sup>**
- + **2.24 million international visitors (2016)<sup>23</sup>**
- + **Direct tourism industry: US\$1.08 billion<sup>24</sup>**
- + **Global liveability ranking = 14<sup>25</sup>**
- + **QS Best Student Cities ranking = 4<sup>26</sup>**

Montreal is the second-most populous city in Canada. The city is an important centre for commerce, aerospace, finance, pharmaceuticals, technology, design, education, culture, tourism, gaming, film and world affairs.

Montreal is also named a UNESCO City of Design and is often referred to as the Canada's Capital of Culture. Montreal has a strong industrial past, which forms an important part of its culture. As a North American city, Montreal shares many cultural characteristics with the rest of the continent. It has a tradition of producing both jazz and rock music. The city has also produced much talent in the fields of visual arts, theatre, music, and dance. Yet, being at the confluence of the French and the English traditions, Montreal has developed a unique and distinguished cultural face. Another distinctive cultural characteristic is the activation of its downtown, particularly during summer, prompted by cultural festivals and social events. The city's largest festival is the Montreal International Jazz Festival, which is the largest jazz festival in the world. Other popular festivals include the Just for Laughs (largest comedy festival in the world), Montreal World Film Festival, Les Franco Folies de Montréal, Nuits d'Afrique, Pop Montreal, Divers/Cité, Fierté Montréal and the Montreal Firework Festival.

It is also home to one of the world's largest cultural enterprises, the Cirque du Soleil. Montreal is the only Canadian city to have held the Summer Olympics and is currently host to the Canadian Grand Prix of Formula 1.

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<sup>22</sup> WRO (2017)

<sup>23</sup> Mastercard Worldwide (2016)

<sup>24</sup> Mastercard Worldwide (2016)

<sup>25</sup> The Economist Intelligence Unit (2017)

<sup>26</sup> QS (2018)

# Greater Melbourne Destination Management Visitor Plan

## SNAPSHOT & IMPLICATIONS FOR GREATER MELBOURNE

	London	San Francisco	Montreal
Global tourism ranking (UNWTO, 2015)	2	33	51
Number of international overnight visitors	19.88 million	3.93 million	2.24 million
Visitor expenditure	US\$14.8 billion	US\$5.93 billion	US\$1.08 billion
Global liveability ranking	53	49	14
Student city ranking	1	38	4
<b>Key tourism strengths</b>			
Food & Wine		✓	
Art & Culture & Music	✓	✓	✓
History & Heritage	✓	✓	✓
Parks & Gardens	✓	✓	✓
Sport	✓	✓	✓
Events & Festivals	✓	✓	✓
Shopping & Markets	✓	✓	✓
Fashion & Design	✓	✓	
<b>Common Strategies</b>			
• Ongoing product development to maintain competitiveness by heroing key assets	✓	✓	✓
• Development of destinations as defined precincts	✓	✓	✓
• Innovation in, and promotion of, sustainable travel	✓	✓	✓
• Working in partnership (with a diverse range of public and private stakeholders and not-for-profit groups) to diversify product offerings, strengthen linkages and deliver mutual benefits with greater impact	✓	✓	✓
• Increasing use of technology to drive innovation personalize experiences and enhance tailored communication and marketing		✓	✓
• Promote value of tourism to residents so that they can be advocates for visitors		✓	
• Expanding and diversifying the marketing, sales and promotional efforts that support tourism in emerging markets to sustain growth of international visitation	✓	✓	✓
• Ongoing investment in infrastructure	✓	✓	✓
• Creation and implementation of sports strategy alongside tourism strategy	✓		✓
• Ongoing research, development, monitoring and evaluation	✓	✓	✓
• Tourism incubator labs to help startups develop products and services for the tourism sector			✓
• Digital solutions that promote accessibility and reduce environmental impact	✓	✓	

Source: London & Partners (2014), San Francisco Travel (2016) & Tourisme Montréal (2015).

### Melbourne's Global Positioning

- Global tourism ranking =# 47
- 2.65 million international visitors
- Direct tourism industry: US\$4.94 billion\* (CBD only)
- Global liveability ranking = 1
- QS Best Student Cities ranking = 3

### Commonalities in the Tourism landscape

- Diversity of products.
- Marketed by theme and organised by neighbourhoods and/or precincts.
- Multiculturalism and cultural diversity underpins the city's uniqueness.
- Balance between green spaces and high density.
- Sightseeing card / visitor pass (card or downloadable).
- UNSECO/World Heritage status for key pillars (e.g. literature, design).

### Comparable Gaps in Current Product Offering

- Stronger definition of neighbourhoods/precincts to showcase diversity. This could be based around Melbourne's food.
- Incorporation of river/bay into tourism products.
- Further development of maritime theme to diversify experience.
- Further development of industrial theme into distinct precincts.
- Promotion of green spaces on outskirts of the city. Promotion of creative arts (including design and music).



## OPPORTUNITIES FOR GREATER MELBOURNE

Looking to the future, Greater Melbourne faces several challenges, such as transport congestion and more widespread digital connectivity<sup>27</sup>. Whilst these challenges are common in many international cities, if Greater Melbourne wants to cement its position as a globally competitive visitor destination, then these need to be addressed. The combination of industry stakeholder insights and visitor perception surveys reveal the following challenges and opportunities facing Greater Melbourne in the future:

- + Visitor perception surveys undertaken in conjunction with this project revealed that parks and gardens are rated as the #1 “must see” visitor attraction in Greater Melbourne. A very real opportunity therefore exists to promote parks, gardens and natural landscapes as an additional pillar of tourism.
- + The strong interest in bleisure time (i.e. combining business travel and leisure travel into one trip) related travel purported by the visitor perception research suggests that targeted marketing (along the Sydney-Melbourne air route for example) has capacity to increase average length of stay and increased visitor spend in Greater Melbourne by tagging on a leisure visit at the beginning or end of a business/conference trip.
- + Many of the most successful tourist destinations in the world e.g. London, Paris, New York all embrace their rivers and leverage it as additional modes of transport and as tourism attractors in their own right. Although the Southbank and Docklands tourism precincts have consciously embraced the Yarra River due to their locational aspects, much more can be done to embrace the Maribyrnong and Yarra Rivers. It is recommended that new tourism developments face the rivers and develop a more coordinated and sustainable approach to development.
- + Despite Melbourne’s strong competitive position, several outer Melbourne industry stakeholders consider there to be significant disparities in marketing and promotion funding, with the CBD and regional Victoria being the primary beneficiaries. This has created somewhat of a “donut effect” with outer Melbourne receiving little funding thereby forced to draw from limited council budgets to promote tourism. If Greater Melbourne is to be promoted as a

## Potential Game-Changer

Modern/new-age travellers are increasingly using digital technology to do more than just access information; they are using it as a platform to share experiences, and to immerse themselves in “living like a local”. Greater Melbourne therefore needs to adapt quickly by advancing how it interfaces with modern-day travellers.

Further enhancement and/or leveraging of existing mobile-first digital assets needs to include the ability to create personalised travel itineraries based on personal preferences which take account of the diversity of Greater Melbourne’s products and experiences and which connects with other information sharing platforms. The delivery of personalised itineraries and interests could potentially position Greater Melbourne as a global leader.

region, then these funding gaps will need to be fairly addressed, ideally through a collaborative marketing partnership.

- + The appetite for collaborative partnership amongst all sub-regions within the Greater Melbourne area is positive. Each sub-region recognises the uniqueness of their region and are keen to promote cross-selling opportunities.
- + Tourism has been traditionally market-led, however, the increased desire for experiential travel is changing how destinations are promoting themselves. Greater Melbourne therefore has an opportunity to further promote its uniqueness as a destination that is globally competitive in its own right.
- + Whilst visitor perception surveys rate public transport in Greater Melbourne high, stakeholder insights reveal that east-west public transport connectivity requires improvement. If Greater Melbourne is to be developed, promoted and marketed collectively, then we need to raise awareness of integration and connectivity across all transport modes in tourism precincts. It is of paramount importance that solutions need to be viewed through a visitor lens.

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<sup>27</sup> In September 2016, Melbourne became the first Australian city to offer free wifi across the CBD at key hotspots.

# Greater Melbourne's Vision for the Future



# Greater Melbourne Destination Management Visitor Plan

## OVERVIEW

### VISION

By 2027, Greater Melbourne will have grown its visitor expenditure by 50%. This will be achieved by working collaboratively with tourism stakeholders to provide enhanced and enriched tourism products and experiences that will captivate visitors to discover and disperse across Greater Melbourne, delivering wide-reaching benefits across the entire local economy.

### KEY OBJECTIVES

Increase quality of tourism offerings across Greater Melbourne | Increase Greater Melbourne share of Victoria's visitor markets  
Offer visitors compelling destinations of distinction | Champion increased engagement between industry, visitors and the experience

### STRATEGIC PLAN

Strategic themes aim to have impact that transcends the region, setting it up for success by providing the springboard for destination development, job creation and visitation.

### STRATEGIC THEMES

1. Positioning & Brand
2. Tourism Product
3. Event Development
4. Capacity & Capability
5. Information
6. Supporting Infrastructure

### OUTCOMES BY 2026/27

34.9 million visitors | 18% growth over next 10 years  
143.2 million visitor nights room nights | 68% growth over next 10 years  
\$24.9 billion visitor expenditure | 50% growth in visitor expenditure over next 10 years



# Greater Melbourne Destination Management Visitor Plan

## VISION & RATIONALE

**By 2027, Greater Melbourne will have grown its visitor expenditure by 50%. This will be achieved by working collaboratively with tourism stakeholders to provide enhanced and enriched tourism products and experiences that will captivate visitors to discover and disperse across Greater Melbourne, delivering wide-reaching benefits across the entire local economy.**

This vision seeks to engineer changes within the Greater Melbourne visitor economy which will captivate visitors on their own journey of discovery and exploration of Greater Melbourne's unique offerings and create experiences which will be long-lasting, compelling to new generations of visitors, and remain relevant to those who already have a deep affinity for Melbourne.

The future of Greater Melbourne seeks to build on the substantial investment that has been made in the Greater Melbourne region over the past decade and challenge itself to remain relevant to both returning and new visitors. Visitor perception research reveals that the tourism product offering in Greater Melbourne is sufficiently diverse enough to the point where no additional attractions need to be provided to improve the competitiveness of Greater Melbourne as a destination. These thoughts were echoed by workshop participants and individual stakeholders who believe that the diversity of Greater Melbourne's tourism offering is sufficiently broad, and that future development efforts should be directed towards increasing the depth of existing experiences by increasing quality and awareness.

The goal of increasing quality of visitors to Greater Melbourne does not mean targeting higher-value tourists; rather it is intended, using experiential travel as the medium and precincts as the drawcard, to create better quality experiences. The creation of, and investment in, authentic tourism products and experiences which embed/reinforce existing and planned tourism precincts will aid dispersal in a sustainable manner. Improvements in public transport (including increased flexibility and connectivity between different modes of transport) and sustainable modes of travel e.g. river and cycling trails, will be necessary to improve the overall quality of the destination.

## TARGET MARKETS

This DMVP considers visitors to Greater Melbourne in their widest context – day visitors and domestic and international business and leisure visitors. Within these two main visitor groups- leisure and business visitor markets - the DMVP is focused on areas where it is considered to have

the greatest impact i.e. in markets with significant value and/or growth potential for Greater Melbourne. These include:

Leisure Visitors	Business Visitors
<ul style="list-style-type: none"><li>• Day visitors VFR visitors</li><li>• Intrastate and interstate overnight leisure visitors</li><li>• Traditional and emerging International leisure visitors</li><li>• Bleisure visitors</li><li>• Niche tourists</li><li>• Short-break visitors</li><li>• Study-related visitors</li><li>• Cruise exchange passengers</li></ul>	<ul style="list-style-type: none"><li>• Intrastate and interstate overnight business visitors</li><li>• International business visitors</li><li>• Meetings, Conference, Incentive &amp; Event visitors</li><li>• Working visitors (short-term workers)</li></ul>

## MAXIMISING VALUE FROM INVESTMENT

In recognition of the diminishing availability of funding from the public sector, this DMVP has adopted an enabling approach to maximise benefits for infrastructure investment. Most of the investment to deliver upgrades to existing business or establishing new businesses in the visitor economy will come from the private sector. Thus, to help facilitate private sector investment, innovative funding propositions may be required. Consultation with industry stakeholders has revealed that obtaining planning permission and unnecessary red tape remains a critical matter to securing investment. The actions recommended in this DMVP therefore seek to build confidence in securing planning permission and releasing private sector finance. Development opportunities therefore need to be approached in different and distinct ways for projects in high-density urban versus more rural locations (particularly those bordering on regional Victoria).

## CRITICAL SUCCESS FACTORS

Achievement of the vision will be dependent on a range of factors, including:

- + Vigorously promoting Greater Melbourne as a world-class, must-see destination with a strong overarching brand underpinned by well-defined sub-regional brands and tourism precinct brands to all potential audience groups and target markets.

# Greater Melbourne Destination Management Visitor Plan

- + Creating a clear positioning for each of the sub-regions and Greater Melbourne, with tourism precincts being destinations in their own right.
- + Providing clear 'reasons to visit' and delivering compelling, unique, memorable and high-quality visitor experiences.
- + Identifying and responding to opportunities that will enhance, extend, activate and promote the tourism landscape for visitors.
- + Further enhancement and/or leveraging of existing digital assets need to include the ability to create personalised travel itineraries based on personal preferences, which take account of the diversity of Greater Melbourne's products and experiences
- + Prioritising investment to deliver the promise and to improve the overall quality and visitability of the visitor experience.
- + Improving access to and within Greater Melbourne to encourage better visitor flow, longer stays and higher spend.
- + Develop and promote tourism precincts that help to "package" Greater Melbourne's visitor offering to key target markets and audiences.
- + Develop products which capitalise on the unique attributes of Melbourne's places and spaces.
- + Deliver enhancements to the physical environment that are mutually beneficial to both visitors and residents.
- + Ensuring the highest standards of customer service by fostering a culture of continuous improvement, value for money, best practice learning and sustainability.
- + Identifying measures of success and monitoring performance.

## TAKING THE DMVP FORWARD

This DMVP provides a broad strategic framework to encourage regional collaboration and to guide future development opportunities in Greater Melbourne. This DMVP is the first step in a process; it is not a prescriptive output. It is a flexible framework for action by, and a reference point for, a range of regional stakeholders in the context of rapidly changing circumstances and on-going initiatives. It is important to recognise that this strategy covers a ten-year period. It is therefore almost impossible to predict the opportunities, threats and environmental issues which will arise over the next decade.

## STAKEHOLDER/PARTNER ORGANISATIONS

The following organisations have been identified as being a stakeholder in the Greater Melbourne visitor economy with the potential to assist or support the delivery of Recommended Opportunities in this DMVP.

Acronym	Organisation
AV	Aboriginal Victoria
CV	Creative Victoria
DCA	Diversity Council of Australia
DM	Destination Melbourne
DEDJTR	Department of Economic Development, Jobs, Transport & Resources
DELWP	Department of Environment, Land Water & Planning
HV	Heritage Victoria
IE	International Education Branch, DEDJTR
I&EP	Investment and Economic Projects Branch, DEDJTR
LG	Local Government
MCB	Melbourne Convention Bureau
MMAC	Melbourne Music Advisory Committee
MV	Music Victoria
PTV	Public Transport Victoria
PV	Parks Victoria
SM	Study Melbourne
SRA	Sport & Recreation Victoria
TAA	Tourism Accommodation Australia
TEVE	Tourism, Events & Visitor Economy Branch, DEDJTR
TfV	Transport for Victoria
VPA	Victorian Planning Authority
VR	VIC Roads
VV	Visit Victoria



## STRATEGIC THEME 1 POSITIONING & BRAND

**Aim: Develop and position Greater Melbourne competitively relative to national and international competitors**

Common Insights*	Common Goals	Recommended Opportunities
<ul style="list-style-type: none"> <li>Marketing and promotion efforts and funding resources are currently viewed as being focused either around the CBD or in regional Victoria. This has led to a “donut” effect of limited marketing funds to promote regional Melbourne. Whilst this promotional donut effect is recognised by Visit Victoria, it is expected that as the visitor market matures and with increased repeat visitation, there will be further opportunities to showcase the variety of experiences that relate to these geographies. In the short to medium term, however, there needs to be recognition that the product offering can be inconsistent and sparse. It is therefore considered that Local Government should determine their own brand proposition for local audiences in a move to gain traction in developing their region. Brand propositioning should however, remain consistent with the overall brand messaging of Greater Melbourne.</li> <li>The use of digital platforms (e.g. internet, social media, smartphone apps, hotel and travel review websites) is one of the most commonly consulted sources of information both pre- and during-trip planning.</li> <li>Continued investment in digital systems (including web and mobile-enabled platforms) such as that undertaken by Visit Victoria is applauded and further encouraged.</li> <li>Local distinctiveness plays an important role in differentiating a destination from another, it provides a reason to visit and makes a significant contribution to positive visitor experiences.</li> <li>Cultural-specific cuisine is a key differentiating factor amongst different tourism precincts throughout Greater Melbourne.</li> <li>The distribution of visitors in time and space is unrelated to council boundaries; marketing and promotion therefore cannot take place within the confines of Local Government borders.</li> <li>Greater Melbourne is well placed to benefit from forecasted population growth, which in turn, generates high levels of VFR visitation. As one of the</li> </ul>	<ul style="list-style-type: none"> <li>Develop a collaborative partnership approach to marketing Greater Melbourne</li> <li>Develop regional Melbourne precinct brands within the overarching Greater Melbourne brand so that they are promoted in a more inclusive manner.</li> <li>Develop local distinctiveness by using the key pillars of food &amp; wine, parks &amp; gardens, history, art, culture, sport and shopping either in isolation or in combination with one another.</li> <li>Identify and respond to opportunities that will enhance, extend, activate and promote the tourism landscape for visitors.</li> <li>Create excitement and deliver experiential travel through advances in digital technological innovation</li> </ul>	<p><b>1.1 Develop a collaborative working partnership approach to developing and promoting tourism in Greater Melbourne</b></p> <p><b>1.2: Ensure that Greater Melbourne, sub-regions and tourism precincts align with Visit Victoria’s Melbourne marketing brand</b></p> <p><b>1.3: Develop digital content to enhance digital marketing</b></p> <p><b>1.4: Enhance digital assets to deliver personalised experiences</b></p>

# Greater Melbourne Destination Management Visitor Plan

**Aim: Develop and position Greater Melbourne competitively relative to national and international competitors**

Common Insights*	Common Goals	Recommended Opportunities
<p>fastest growing cities in Australia, potential exists to raise existing profile and ability to match market needs.</p> <ul style="list-style-type: none"><li>Increased demand in experiential travel means that visitors are no longer purchasing individual products or a series of unconnected events; rather they are looking for memorable experiences that are long-lasting and have a close association with the destination and involve multiple touchpoints across the visitor economy.</li></ul>		

\* Common insights are based on the culmination of stakeholder workshops, individual consultations, visitor perception surveys, online surveys and research relevant to this DMVP.

# Greater Melbourne Destination Management Visitor Plan

## 1.1 Develop a collaborative working partnership approach to developing and promoting tourism in Greater Melbourne<sup>28</sup>

### Recommended Opportunities

- Develop a partnership approach to promotion to ensure key channels (websites, brochures, digital platforms) are “on brand”, timely, reinforce and are effective in ensuring that tourism businesses fully utilise the technology available.
- Work collaboratively to deliver a coordinated approach to marketing across the Greater Melbourne region. This will involve collaboration and consistency at key gateways (airport, stations and cruise terminals).

## 1.2 Ensure that Greater Melbourne, sub-regions and tourism precincts align with Visit Victoria’s Melbourne marketing brand

### Recommended Opportunities

- Leverage the recently released Visit Victoria brand: “*A Twist at Every Turn*” marketing brand to define each of Greater Melbourne’s sub-regions in support of the overarching brand. Key emphasis should be placed on defining each region’s individual distinctiveness and developing key brand assets.
- Link local attractions and events into marketing activity to disperse visitors into Greater Melbourne.
- Streamline marketing clarity to minimise duplication of effort across stakeholders and agencies.

## 1.3 Develop digital content to enhance digital marketing

### Recommended Opportunities

- Encourage each sub-region to develop key digital content to be distributed through key Greater Melbourne destination digital media: Visit Victoria, Melbourne Now, Discover Your Own Backyard and operator digital media – PTV, Skybus, hotels etc. Content should be focused on relevant, bold and creative marketing that inspires and delivers results.

## 1.4 Enhance digital assets to deliver personalised experiences

### Recommended Opportunities

- Enhance and/or leverage existing digital assets to enable visitors to enter their demographic profile, travel preferences, likes/dislikes, budget, transportation options, length of trip to generate a highly personalised travel itinerary which will maximise their experience and deliver a unique path of discovery and exploration during their stay in Greater Melbourne.
- Include capabilities to enable visitors to find free Wi-Fi hotspots.

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<sup>28</sup> Links with Victoria’s Visitor Economy Strategy Action Plan (May 2017). Priority: More Effective Coordination (consult to obtain a synopsis on lessons learned through application and implementation elsewhere in Victoria).

# Greater Melbourne Destination Management Visitor Plan

## STRATEGIC THEME 2 TOURISM PRODUCT

**Aim: Maintain and develop the tourism product required to sustain and grow the destination**

Common Insights*	Common Goals	Recommended Opportunities
<ul style="list-style-type: none"> <li>Overall, the key pillars of Melbourne's tourism offering are well-known and well communicated and marketed in both printed and digital format.</li> <li>Melbourne is not known by a single icon, but rather as a diverse and extensive collection of attractions and experiences. There is mixed opinion regarding whether Melbourne should have a globally recognised 'picture postcard' icon to position itself more firmly on the international stage.</li> <li>Greater Melbourne's sub-regions are differentiated mainly by the local attractions and activities experienced and by the distinct restaurant and café offerings.</li> <li>Parks and gardens are one of the highest rated "must-see" attractions in Greater Melbourne yet they are not promoted as such.</li> <li>Workshop participants and individual stakeholders view Melbourne's music scene to be of an extremely high quality, yet under promoted, especially in regional Melbourne.</li> <li>There is widespread belief amongst stakeholders that an indigenous cultural attraction is 'missing' from Greater Melbourne's tourist asset list.</li> <li>International visitors consider Melbourne to be known on the global stage for its multiculturalism, attractiveness, architecture and welcoming people.</li> <li>There is an increasing trend towards bleisure travel, indicating that business visitors extend their business trip either pre- or post-trip to engage in the leisure activities on offer.</li> <li>International visitors surveyed indicated that improvements to the city's nightlife and markets would make the city more attractive as a visitor destination.</li> </ul>	<ul style="list-style-type: none"> <li>Develop a high quality experiential destination that attracts visitors who spend more, explore beyond the CBD and stay longer.</li> <li>To increase dispersal by providing reasons for visitors to explore beyond the boundaries of the CBD.</li> <li>Develop a compelling offer for visitors that sets it apart from other globally competitive destinations, which capitalises on the unique attributes of Greater Melbourne's places and spaces.</li> <li>Develop and promote tourism precincts that help to "package" Greater Melbourne's visitor offer to key target markets and audiences.</li> <li>Deliver enhancements to the physical environment that are mutually beneficial to both visitors and residents.</li> <li>Investigate opportunities to develop a world-class indigenous cultural attraction and/or diversify the indigenous product offering by creating deeper experiences within existing products.</li> <li>Investigate opportunities to satisfy demands associated with multigenerational travel.</li> </ul>	<ul style="list-style-type: none"> <li><b>2.1 Enhance parks, gardens, nature and outdoor brand and offering</b></li> <li><b>2.2 Increase activation of the Maribyrnong and Yarra Rivers, associated waterways, beaches and Port Phillip Bay</b></li> <li><b>2.3 Investigate the industrial tourism potential offering of Greater Melbourne</b></li> <li><b>2.4 Further develop the indigenous cultural offering in Greater Melbourne</b></li> <li><b>2.5 Expand Greater Melbourne's music scene</b></li> <li><b>2.6 Refine and promote Greater Melbourne's retail and market offering</b></li> <li><b>2.7 Develop the food, wine &amp; beverage offering beyond the CBD</b></li> <li><b>2.8 Identify existing and new precincts which require investment or development to maximise their tourism potential</b></li> <li><b>2.9 Elevate and broaden Greater Melbourne's status as a Creative City</b></li> </ul>

# Greater Melbourne Destination Management Visitor Plan

**Aim: Maintain and develop the tourism product required to sustain and grow the destination**

Common Insights*	Common Goals	Recommended Opportunities
<ul style="list-style-type: none"> <li>Regional Melbourne attracts a significantly greater proportion of family groups (travelling with children) than the CBD, and with VFR being a primary demand driver of visitation by leisure visitors, opportunities which satisfy multigenerational travel preferences should be considered and implemented.</li> </ul>		

\* Common insights are based on the culmination of stakeholder workshops, individual consultations, visitor perception surveys, online surveys and research relevant to this DMVP.



# Greater Melbourne Destination Management Visitor Plan

## 2.1 Enhance parks, gardens, nature and outdoor brand and offering<sup>29</sup>

### Recommended Opportunities

- Work with Local Councils and Parks Victoria to develop a Parks, Gardens & Nature Visitor Strategy which will capitalise natural environmental assets (waterways, green spaces, trails network) to enhance the outdoor brand positioning of Greater Melbourne and to encourage dispersal from CBD to outer metro regions.
- Encourage the establishment of a Parks, Gardens & Nature working group for Greater Melbourne which will work across council boundaries to enhance the visitor appeal of interlinking green spaces and networks.
- Investigate ecotourism accommodation development opportunities in areas with high biodiversity appeal, especially those close to RAMSAR sites and coastal areas of significance.
- Using the Royal Botanic Gardens at Cranbourne as the anchor, spearhead a joined-up approach to promote other botanic gardens such as Wilson Botanic Park Berwick in the South East and others in Greater Melbourne (notably those in Inner Melbourne and as well as at Williamstown and Melton).
- Support existing masterplans which will elevate the parks, gardens and nature offering of Greater Melbourne e.g. at Werribee Open Range Zoo, and Pipemakers Park.
- Create new walking, cycling, canoeing events which showcase the natural offering of Greater Melbourne.
- Create sustainability, wildlife, nature and environment events and festivals to showcase Greater Melbourne's strength in parks, gardens and nature.
- Develop a connected golf tourism strategy for all Greater Melbourne regions.
- Develop the equine potential of Melbourne's West and South East by executing existing strategies.

## 2.2 Increase activation of the Maribyrnong and Yarra River, associated waterways, beaches, and Port Phillip Bay

### Recommended Opportunities

- Investigate opportunities (and supporting infrastructure required) to activate the Maribyrnong and Yarra rivers and associated waterways to enhance visitor appeal.
- Investigate the adventure tourism appeal of lakes and reservoirs throughout Greater Melbourne.
- Develop a coastal tourism strategy for the South East which aims to elevate the region's status as a recreational water playground.
- Support the development of Seaworks at Williamstown as the home of maritime heritage.

## 2.3 Investigate the industrial tourism potential offering of Greater Melbourne

### Recommended Opportunities

- Develop a clear industrial tourism strategy for Melbourne's West and South East to showcase the industrial background of Newport, Spotswood and Yarraville among others specifically and the food manufacturing and beverage sites in the South East generally.
- Pilot a Melbourne Industrial Heritage Week which celebrates the industrial heritage offering in Melbourne's West (and other regions, notably Melbourne's South East).

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<sup>29</sup> Links with Victoria's Visitor Economy Strategy Action Plan (May 2017). Priority: Better Tourism Investment (outdoor recreation infrastructure)

# Greater Melbourne Destination Management Visitor Plan

## 2.4 Further develop the indigenous cultural offering in Greater Melbourne

### Recommended Opportunities

- Investigate the potential to diversify the indigenous product offering by creating deeper experiences within existing products e.g. enhancing linkages between Koorie Heritage Cultural Centre at Federation Square and the permanent First Peoples exhibition at Melbourne Museum.
- Investigate the potential of creating a visitor attraction and interpretation centre in Brimbank Park which showcases the Aboriginal archaeological importance of the area.
- Work with other regions (most notably Melbourne's North) to connect with complementary Aboriginal tourism products such as the Spiritual and Healing Trail, Merri Creek, and the Koori Mural.

## 2.5 Expand Greater Melbourne's music scene

### Recommended Opportunities

- Work with Music Victoria and Melbourne Music Advisory Committee to develop a Music Strategy for Greater Melbourne based on best practice outcomes as delivered through the City of Melbourne Music Strategy.
- Extend the events and activities of Melbourne Music Week to include Greater Melbourne.
- Investigate the potential for regions within Greater Melbourne to become involved in the Rockin' the Laneways program (\$22 million State Music Works initiative to strengthen Victoria's music industry).
- Develop and support initiatives which encourage greater collaboration between hospitality, tourism business and local musicians.

## 2.6 Refine and promote Greater Melbourne's retail and market offering

### Recommended Opportunities

- Support the redevelopment of the Queen Victoria Market.
- Use existing strategic plans, create a sustainable urban markets action plan to support and grow street and covered markets as visitor destinations in their own rights (including, amongst others, St Kilda Esplanade Market, South Melbourne Markets and Dandenong Market).
- Enhance visitability to markets outside of Inner Melbourne, focussing on farmers' markets and the 'farm to plate' trend.
- Explore ways to support the growth and development of entrepreneurs and new businesses in the retail sector, including: encouragement of pop-up retail units for the testing of products in development; and incubator spaces for emerging creative enterprises.

## 2.7 Develop the food, wine & beverage offering beyond the CBD

### Recommended Opportunities

- Develop a clear food, wine & beverage tourism strategy all sub-regions in conjunction with existing food and wine strategies with the aim of packaging the different elements into an offer for visitors and tested through a series of new marketing initiatives.
- Investigate potential to boost the coastal culinary tourism in coastal regions.
- Strengthen connections with Melbourne Food & Wine Festival (and other such events) to raise the food & wine profile throughout Greater Melbourne.
- Develop new food, wine & beverage events and itineraries to encourage visitation and celebrate the farmgate and wine offering in Greater Melbourne.

# Greater Melbourne Destination Management Visitor Plan

## 2.8 Identify existing and new precincts which require investment or development to maximise their tourism potential

### Recommended Opportunities

- Work in an integrated manner with government and statutory authority partners to improve the tourism experience for visitors at key tourist precincts in the CBD including: Melbourne Museum Precinct, Federation Square, Southbank Precinct. In regional Melbourne, Werribee Park, Arden and others in regional Melbourne.
- Support continued development of the Creative Precinct, Sports Precincts including MCG and Docklands.
- Work with local businesses and stakeholder groups to develop local tourism infrastructure within key tourism hotspots in regional Melbourne that offer unique and authentic visitor experiences centred around a combination of strengths e.g. food and the arts, green space and food, wildlife and trails.
- Work with stakeholders within the NGV, Arts Centre Melbourne and local tourism operators, cultural and arts organisations and associations to develop a well- defined precinct with gateway signage, street performers, pavement art.

## 2.9 Elevate and broaden Greater Melbourne's status as a Creative City

### Recommended Opportunities

- Work with Creative Victoria to ensure that Greater Melbourne is integrated with Melbourne's (CBD) creative strategy and cultural community and acts as a springboard for new initiatives.
  - Work with Creative Victoria through a visitor lens to develop new spaces and/or experiences which enhance Greater Melbourne's cultural offering.
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## STRATEGIC THEME 3 EVENT DEVELOPMENT

Aim: Evolve and develop major events		
Common Insights*	Common Goals	Recommended Opportunities
<ul style="list-style-type: none"> <li>Melbourne is well-known as the events and festival capital of Australia; however, Sydney has stepped up its game in recent years with internationally acclaimed events such as Vivid Sydney attracting high volumes of visitors during the off-peak (winter) season. The recent opening of the Sydney International Convention Centre (Sydney ICC) has been well-received and as such, has attracted several international conventions and world congress, and is a popular choice amongst the Chinese and Indian incentive markets. Melbourne needs to match this increased competitiveness and 'not rest on its laurels' in this regard.</li> <li>Stakeholder workshops revealed a great disparity and disjointedness between councils in regional Melbourne. Whilst some regions have been more proactive in 'piggybacking' off blockbuster events held in Melbourne CBD e.g. Food &amp; Wine Festival, others have not embraced the opportunities presented (primary due to lack of funding, venues to host events and/or expertise).</li> <li>There is widespread support for regional Melbourne to work in partnership with event organisers to develop unique events and complementary co-hosted regional events that encourage visitation and dispersal and showcase the region to entice repeat visitation.</li> <li>Results of visitor perception surveys indicated that 5% of the domestic leisure market visited Melbourne specifically to attend a sporting event.</li> <li>Results of the visitor perception survey reveal that international visitors, especially those from New Zealand, UK and USA recognise Melbourne as being a popular sporting capital on the world stage.</li> </ul>	<ul style="list-style-type: none"> <li>Expand the depth and duration of events to increase national and international pulling power.</li> <li>Extend city-centre blockbuster events to include Greater Melbourne which will enhance the overall experience for visitors and increase resident participation and engagement.</li> <li>Encourage Greater Melbourne precincts to draw on their local distinctiveness to expand their events calendar.</li> <li>Provide assistance and share best practices to host events.</li> <li>Advocate for continued investment in meetings and event space to build corporate meetings, conference and events industry in Greater Melbourne.</li> </ul>	<p><b>3.1: Expand and refine current events strategies to encourage dispersal of events across Greater Melbourne</b></p> <p><b>3.2: Identify and activate under-utilised spaces to create new and intimate venues to host events</b></p> <p><b>3.3: Develop and bid for new festivals and events across Greater Melbourne with a vision for dispersal and growth</b></p>

\* Common insights are based on the culmination of stakeholder workshops, individual consultations, visitor perception surveys, online surveys and research relevant to this DMVP.

# Greater Melbourne Destination Management Visitor Plan

## 3.1 Expand and refine current events strategies to encourage dispersal of events across Greater Melbourne<sup>30</sup>

### Recommended Opportunities

- Work with Visit Victoria, Melbourne Convention Bureau and others to expand and refine Melbourne's event strategy to encourage greater dispersal of events across Greater Melbourne.
- Investigate the use of open spaces to enhance the animation and activation of parks, gardens and open spaces for events, arts and cultural activities.
- Investigate the potential of using the Maribyrnong and Yarra rivers for flotilla, pageants and events.
- Work with event management companies, venues and local councils to create a truly cohesive and coordinated approach to enhance and extend existing events and festivals.

## 3.2 Identify and activate under-utilised spaces to create new and intimate venues to host events

### Recommended Opportunities

- Create an inventory and classification of current and under-utilised venues and spaces to host intimate events (e.g. music, performing arts).
- Identify partnership opportunities to increase awareness and encourage greater utilisation of event spaces.
- Develop an intimate events calendar and communicate this.

## 3.3 Develop and bid for new festivals and events across Greater Melbourne with a vision for dispersal and growth<sup>31</sup>

### Recommended Opportunities

- Work with local councils in Greater Melbourne to identify gaps and overlaps of events and festivals in their area.
- Identify and prioritise new growth markets and segments taking into account the sectorial strengths in Greater Melbourne (e.g. health, aviation, research & development, education) to drive more conference, incentives and business events to Greater Melbourne.
- Encourage event organisers to work with existing attractions and dining precincts to increase activation during high crowd-volume generating events.

<sup>30</sup> Links with Victoria Visitor Economy Strategy Action Plan (May 2017). Priority: Maximise the Benefits of Events

<sup>31</sup> Links with Victoria Visitor Economy Strategy Action Plan (May 2017). Priority: Maximise the Benefits of Events



# Greater Melbourne Destination Management Visitor Plan

## STRATEGIC THEME 4 CAPACITY & CAPABILITY

**Aim: Build capacity and capability to manage and develop the destination from a united regional perspective**

Common Insights	Common Goals	Recommended Opportunities
<ul style="list-style-type: none"> <li>• A partnership approach to the future tourism development and marketing of visitor products is critical to maximise funding and resources.</li> <li>• Clustering of products within tourism precincts and working together to 'build a unique experience' for visitors is expected to lead to word-of-mouth recommendations and repeat visitation.</li> <li>• Workshop participants voiced their concern that in a fast-changing world, most tourism businesses are too small to undertake their own research, purchase datasets and/or lack the skills to interpret the available data. Assisting an industry comprised of mainly small businesses by providing industry intelligence would be very well received and provide valuable insights for business decisions.</li> <li>• International case studies and best practices from other globally successful tourism destinations have shown that building partnerships between the tourism industry and the broader community and obtaining community acceptance and support for tourism is essential to building sustainable communities.</li> <li>• Although results from the visitor perception research did not specifically seek insights regarding customer service, a high proportion of visitors consider Melbourne to be a welcoming city, inferring that they received a satisfactory customer service experience during their stay. Industry stakeholders however, consider there to be much scope to improve a consistent quality of customer experience.</li> </ul>	<ul style="list-style-type: none"> <li>• Generate a framework of close collaboration between public and private stakeholders, combining their efforts to ensure the smooth running of the tourism value chain.</li> <li>• Continue to recognise and support the ambassador roles that are currently performed by volunteers in Melbourne (e.g. Red Coat Volunteers, visitor information centres – VICs, etc.) and at Melbourne Airport.</li> <li>• Use the synergies between different tourism operators within tourism precincts to optimise resources, avoid duplication and gain maximum efficiency.</li> <li>• Enable and empower tourism businesses with data-based insights into Greater Melbourne's visitors and emerging trends. This will improve decision-making and facilitate more effectively targeted marketing, thereby improving their return on investment and economic sustainability.</li> <li>• Leverage local engagement programs to promote tourism in local areas.</li> <li>• Educate tourism and hospitality operators (including volunteers who perform visitor-facing duties) to deliver a consistent, quality level of customer service.</li> </ul>	<p><b>4.1 Create an industry-wide collaborative working group to deliver on the Recommended Opportunities of the DMVP</b></p> <p><b>4.2 Learn about what other Greater Melbourne destinations have to offer and learn from best practice application</b></p> <p><b>4.3 Partner with Study Melbourne to understand the impact of international students on Greater Melbourne's visitor economy</b></p> <p><b>4.4 Further develop the existing Greater Melburnian Ambassador Program to promote individual places/regions</b></p> <p><b>4.5 Stimulate investor confidence throughout Greater Melbourne</b></p>

\* Common insights are based on the culmination of stakeholder workshops, individual consultations, visitor perception surveys, online surveys and research relevant to this DMVP.

# Greater Melbourne Destination Management Visitor Plan

## 4.1 Create an industry-wide collaborative working group to deliver on the Recommended Opportunities of the DMVP<sup>32</sup>

### Recommended Opportunities

- Create a collaborative working group across LG stakeholders with a culture that exists to develop innovative, place-based efforts to increase visitor dispersal and provide implementation accountability.
- Build, maintain and leverage relationships with local, state and federal government agencies to protect and enhance the visitor experience in Greater Melbourne, using Destination Melbourne and Visit Victoria as the conduits.
- Establish a working relationship with the Diversity Council of Australia to ensure that Greater Melbourne continues to be viewed as a welcoming destination to travellers of all social, ethnic and cultural diversity.

## 4.2 Learn about what other Greater Melbourne destinations have to offer and learn from best practice application<sup>33</sup>

### Recommended Opportunities

- Further enhance the existing Tourism Excellence program for industry to increase operator knowledge and understanding of the experiences on offer in their own region and in adjacent regions (Operators on tour program).
- Enhance public relations activities in Greater Melbourne by working with local media outlets to identify and report on good news tourism stories as part of the capacity building and reputation building efforts for each region.
- Encourage and support collaborative networking activities as a platform to exchange best practice applications and share industry information and insights.

## 4.3 Partner with Study Melbourne to understand the impact of international students on Greater Melbourne's visitor economy

### Recommended Opportunities

- Work with Study Melbourne to compile a segmentation profile of international students (nationality, country of origin, age, campus location, course of study, length of course)
- Implement a proactive program of on-ground support (Study Melbourne) and targeted international student engagement programs to drive ongoing engagement post arrival.
- Partner with local ethnic media across digital, social and print media to engage international students.
- Partner with Study Melbourne and international education providers to target students and family members both pre- and post-arrival to maximise visitor experiences.

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<sup>32</sup> Links with Victoria's Visitor Economy Strategy Action Plan (May 2017). Priority: More Effective Coordination (consult to obtain a synopsis on lessons learned through application and implementation elsewhere in Victoria)

<sup>33</sup> Links with Victoria's Visitor Economy Strategy Action Plan (May 2017). Priority: A Skilled & Capable Sector

# Greater Melbourne Destination Management Visitor Plan

## 4.4 Further develop the existing Greater Melburnian Ambassador Program to promote individual places/regions

### Recommended Opportunities

- Encourage more Melburnians to enjoy the destinations on their doorstep by expanding the delivery of “*Discover your Own Backyard*” campaign and encouraging local residents to perform ambassadorial roles for Greater Melbourne. Lessons learned from the Greater Melbourne’s existing VICs as well as Melbourne’s Red Coat volunteers should be leveraged to maximise outcomes.
- Develop a communications strategy which highlights the positive contribution of tourism to society, including socio-economic benefits, job creation, skills development and contribution to creativity and innovation.
- Leverage people of influence to generate awareness and expand marketing reach e.g. international students studying in Melbourne, ethnic associations in Melbourne, influential businessmen, sports stars or celebrity chefs.

## 4.5 Stimulate investor confidence throughout Greater Melbourne

### Recommended Opportunities

- Promote and facilitate investment across Greater Melbourne by developing an investment attraction strategy which will include (at a minimum):
  - Communicate that Greater Melbourne is open for tourism investment through an annual Tourism investment forum and regular communication with the international investment community, and
  - Deliver an investment-ready seminar to provide tourism proponents seeking investment with an improved understanding of the requirements of potential investors so that the proponents can become investment ready.
- Promote and facilitate tourism investment across Greater Melbourne by streamlining and shortening approval timeframes.

## STRATEGIC THEME 5 INFORMATION

Aim: Develop and maintain consistent visitor information for dissemination through key visitor mediums		
Common Insights	Common Goals	Recommended Opportunities
<ul style="list-style-type: none"> <li>The majority of people rely on word-of-mouth for information – either from relatives, locals or prior experience. This suggests two opportunities:               <ul style="list-style-type: none"> <li>Inspire and encourage students to gain greater knowledge (and access to information) so that they may be able to be active advocates for Greater Melbourne’s diverse tourism offering.</li> <li>Develop a digital visitor information system that allows for the tailoring and packaging of itineraries that are defined by individual visitor needs.</li> </ul> </li> <li>Visitor perception survey results indicate that over 75% of visitors use the internet, social media and other digital technology platforms to obtain information about Greater Melbourne both before and during their trip. Maintaining high visibility in the global digital economy is therefore critical to success. Potential visitors need to be able to access current and compelling high-quality information to compare offerings, book experiences and pay for them online. Tourism businesses need to become more visible and accessible by building their digital skills, pushing for better infrastructure and providing free Wi-Fi to visitors. In a continuously changing digital world, maintaining competitiveness will be an ongoing challenge.</li> </ul>	<ul style="list-style-type: none"> <li>Develop a data collection system which will deliver qualitative and quantitative intelligence that will support the business decisions of stakeholders.</li> <li>Encourage tourism operators to be technologically smart, connected and efficient, doing business better and reaching consumers in new and innovative ways.</li> <li>Encourage a consistent approach to wayfinding across Greater Melbourne.</li> </ul>	<p><b>5.1 Use digital technology, platforms and systems to create marketing innovation across tourism businesses</b></p> <p><b>5.2 Inform decision-making with data, research, intelligence and insights</b></p> <p><b>5.3: Roll-out the Melbourne Wayfinding Signing Master Style Guide across Greater Melbourne</b></p>

\* Common insights are based on the culmination of stakeholder workshops, individual consultations, visitor perception surveys, online surveys and research relevant to this DMVP.

# Greater Melbourne Destination Management Visitor Plan

## 5.1 Use digital technology, platforms and systems to create marketing innovation across all tourism businesses

### Recommended Opportunities

- Host workshops which highlight key learnings from best practice Digital Ready programs to improve tourism operator digital and social media presence.
- Use information to 'push' additional experiences at decision-making stages of the visitor journey, as an opportunity to extend the value of the visitor trip.
- Revamp marketing strategies to an "always on" approach in the domestic markets to ensure consideration of Greater Melbourne throughout the visitor planning cycle and to drive incremental web usage.

## 5.2 Inform decision-making with data, research, intelligence and insights<sup>34</sup>

### Recommended Opportunities

- Create more robust and insightful customer segment profiles combining digital data with existing data sources to achieve a greater understanding of market profiles, identify high points and pain points in the visitor journey and apply results to drive higher return on product investment across all key leisure and business markets.
- Develop a comprehensive understanding of the student, millennial, family and cruise segments and create strategies to provide experiential travel experiences to these markets using digital platforms.
- Consider the merits of expanding baseline GIS mapping capabilities for inclusion in the execution of the digital marketing strategy for Greater Melbourne.
- Conduct regular Melburnian sentiment surveys to inform on local sentiment towards visitors and the need for adaptive changes.
- Communicate and promote data insights to tourism operators to assist in better-informed business decisions.

## 5.3 Roll-out the Melbourne Wayfinding Signing Master Style Guide across Greater Melbourne

### Recommended Opportunities

- Promote and encourage the roll-out of the Melbourne Wayfinding Signing Master Style Guide (as developed as an outcome of the Melbourne Visitor Signage Project<sup>35</sup>) across Greater Melbourne, commencing with Inner Melbourne (and secondly with Melbourne's West) to build consistency between existing wayfinding signage systems in Melbourne.

**Note:** This recommended opportunity is only expected to be encouraged for roll-out to other regions following successful implementation in the IMAP region.

<sup>34</sup> Links with Victoria's Visitor Economy Strategy Action Plan (May 2017). Priority: Improved Experiences for Visitors from Asia

<sup>35</sup> [http://imap.vic.gov.au/uploads/Meeting%20Agendas/2017%20August/Att%207\\_IMAP\\_Wayfinding\\_Draft%20Project%20Brief\\_25%20Aug%202017.pdf](http://imap.vic.gov.au/uploads/Meeting%20Agendas/2017%20August/Att%207_IMAP_Wayfinding_Draft%20Project%20Brief_25%20Aug%202017.pdf)



# Greater Melbourne Destination Management Visitor Plan

## STRATEGIC THEME 6 SUPPORTING INFRASTRUCTURE

**Aim: Identify and progress city-wide, regional and local infrastructure that will support the destination**

Common Insights	Common Goals	Recommended Opportunities
<ul style="list-style-type: none"> <li>There is widespread acknowledgment that transport infrastructure developments are integral to every city and visitors have come to expect this, however, communication of alternative routes (and estimate of journey times) to reach their chosen destination is critical.</li> <li>There is a high preference amongst visitors (particularly business visitors) to have access to free Wi-Fi on public transport.</li> <li>There is the need to raise awareness of integration and connectivity across transport in Greater Melbourne amongst both visitors and stakeholders. This includes the myki system, frequency and connectivity of public transport and airport services.</li> <li>There is a need to develop a long-term vision and options for both domestic ferry and cruise ship operations in Melbourne based at Station Pier.</li> <li>The accommodation offering in Greater Melbourne is characterized by a concentration of upper- and luxury-scale internationally branded hotels in the CBD and typically mid-scale, unbranded or nationally branded hotels in Greater Melbourne. This imbalance, to a large extent, limits overnight stay and suppresses economic benefit as a result.</li> <li>Based on international case studies, social, cultural and environmental sustainability is becoming increasingly integral in destination development and management. Greater Melbourne should therefore lead by example by reviewing its own policies and procedures including green event guidelines, accommodation and business event procurement, sponsorship and venue operating standards to encourage sustainability.</li> </ul>	<ul style="list-style-type: none"> <li>Continue to work with Transport for Victoria to achieve greater coordination in terms of information provision, communication, connectivity and timetabling.</li> <li>Work with relevant transport agencies to further develop smart ticketing and travel solutions to visitors.</li> <li>Develop relationships and improve connections with Victorian Ports Corporation, Transport for Victoria and cruise operators to ensure facilities for passenger cruise ships can cope with expected increased capacity.</li> <li>Establish market demand for internationally branded hotels and develop an economic development and investment attraction strategy to attract new hotel investment where needed.</li> <li>Focus on encouraging investment in new environmentally sustainable tourist infrastructure and improving the quality of the public domain in main tourism precincts.</li> <li>Advocate to government and the property sector the need to increase the levels of new hotel accommodation, particularly in the internationally branded 3–4 star range, throughout Greater Melbourne.</li> <li>Support and leverage the future development of the Airport Rail Link and the Suburban Rail Loop.</li> </ul>	<p><b>6.1 Work with Transport for Victoria and its agencies to promote greater use of public transport and positive visitor experiences</b></p> <p><b>6.2 Communicate ways to travel within and across Greater Melbourne on public transport</b></p> <p><b>6.3 Improve sense of arrival for cruise ship passengers at Station Pier</b></p> <p><b>6.4 Increase diversity of visitor accommodation across Greater Melbourne</b></p>

\* Common insights are based on the culmination of stakeholder workshops, individual consultations, visitor perception surveys, online surveys and research relevant to this DMVP.

# Greater Melbourne Destination Management Visitor Plan

## 6.1 Work with Transport for Victoria and its agencies to promote greater use of public transport and positive visitor experiences <sup>36</sup>

### Recommended Opportunities

- Work collaboratively to deliver improved, integrated transport infrastructure services (particularly east-west connections) using a visitor lens to improve travelling times between key points of interest.
- Work in partnership with Transport for Victoria and its agencies to develop campaigns that encourage travel along specific lines and routes.
- Continue to work with Transport for Victoria to plan for, and mitigate, transport bottlenecks during peak visitation times and during key events and festivals.
- Develop a communications checklist to ensure continuous and seamless delivery of positive visitor experiences.
- Work in partnership with public authorities and commercial transport providers, to ensure that the needs of visitors are well understood and acted upon, and that their value to local economies is fully taken on board in policy decisions about transport infrastructure and service provision.

## 6.2 Communicate ways to travel within and across Greater Melbourne on public transport

### Recommended Opportunities

- Increase awareness of the myki visitor card.
- Develop a communications strategy to keep industry stakeholders involved and aware of changes taking place within this space.

## 6.3 Improve sense of arrival for cruise ship passengers at Station Pier

### Recommended Opportunities

- Continue to work with Victorian Ports Corporation (Melbourne) examine the strategic and infrastructure options for domestic ferry and cruise ship options.
- Advocate and support the development of Port Phillip Waterfront Precinct.
- Encourage and launch initiatives to help optimise the cruise passenger experience.

## 6.4 Increase diversity of visitor accommodation across Greater Melbourne

### Recommended Opportunities

- Undertake a detailed visitor accommodation audit and gap analysis to identify gaps in the diversity of accommodation provision, international brand presence, quality and facility provision.
- Develop an options model and accommodation strategy to meet current and future anticipated demand drivers.
- Develop a tourism investment prospectus to attract international operator interest to meet demand gaps.

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<sup>36</sup> Link with Victoria's Visitor Economy Strategy Action Plan (May 2017). Priority: Improved Access into and around Victoria.

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