Tourism Victoria

Tourism Development Plan

for

Melbourne Riverlands

Final Draft

November 1996

KPMG

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Contents

1 Introduction

1.1 Background

KPMG Management Consulting have been commissioned jointly by the Melbourne Riverlands Working Group and Tourism Victoria, to prepare a tourism strategy for the area presently defined as "Melbourne Riverlands" (MR), a name evolved through the development and initiative of an existing working group comprised of representatives of the following Councils and State bodies:

- City Councils of Manningham, Banyule, Maroondah and Whitehorse;
- Shire of Nillumbik;
- Melbourne Parks and Waterways; and
- Department of Natural Resources and Environment.

This existing "Melbourne Riverlands" working group brings together local government and government agency bodies, focused toward the development of a regional tourism industry. To date it has successfully provided the opportunity for these government representatives and agencies to co-ordinate activities across the region. In turn it has also provided, and should continue to provide, a mechanism to encourage the development of the industry and growing private sector involvement.

An important regional linkage has been the active involvement of Melbourne Parks and Waterways (MPW), which, due to its metropolitan coverage, has been able to provide the macro level focus necessary to develop and enhance both the recreation and tourism experience.

The mission statement for this working group is:

"To initiate, facilitate and support the building of a tourism industry in the Melbourne Riverlands region"

Key objectives that arise from this Mission Statement include:

- To maintain, protect and enhance the integrity of the natural and man-made tourism assets of the region;
- to promote and encourage innovative and original business developments that are in keeping with the natural and cultural heritage of the region; and
- to maintain the "livability" qualities of the region and to meet the needs and expectations of local communities through consultation and proper management of tourism developments.

In commissioning this study, Tourism Victoria wishes to draw upon The Regional Development Planning work for the Yarra Valley, Dandenongs and The Ranges Product region, to assist the Melbourne Riverlands working group clarify their identity and purpose in terms of tourism.

For the purposes of assessing the scope for tourism in the Melbourne Riverlands, we provide below definitions that clearly differentiate tourism and recreation:

- Tourism is travel more than 40km from the normal place of residence, except that undertaken to and from the usual place of work, which attracts economic benefit and increased yield.

- Recreation is generally non-commercial and involves individual or family-oriented passive and active pleasure activities within a 40km radius of the normal place of residence.

Tourism Victoria, as the peak tourism body within the State, is coming to the close of a very successful three year period where it has sought to turn around perceptions of Victoria and Melbourne as an attractive tourist destination.

A strategic, research driven approach to the development of Victoria and Melbourne's tourism base is an approach now well recognised through peak tourist bodies across the State and one well supported by government, as evidenced in its budgetary allocations.

The key challenge facing Tourism Victoria, termed the "Regional Challenge", is to embark upon a product development and marketing program to encourage visitors to Melbourne to move into regional Victoria, thereby improving yield, through increased length of stay and visitor expenditure.

For the regions themselves, it should be recognised that not all will benefit equally from the success of Victoria's development as a tourism State. It will be the strategic focus leading into the Year 2001, adopted by the proactive regions, that should enable them to better identify, develop and capitalise upon what are truly unique aspects and features of their Region, and therefore best position themselves to gain support and benefit from existing programs and campaigns.

The challenge facing Melbourne Riverlands, and its neighbouring regions, therefore, is to focus upon those initiatives which provide the opportunity to make a real and lasting difference, in a strategic sense, to tourism in the area.

1.2 Disclaimer

Please note that, in accordance with our Company's policy, we are obliged to advise that neither the Company nor any member nor employee undertakes responsibility in any way whatsoever to any person or organisation (other than Tourism Victoria) in respect of information set out in this report, including any errors or omissions therein, arising through negligence or otherwise however caused.

2   Executive Summary

Melbourne Riverlands is well advanced in terms of offering a number of highly developed recreational assets. In a tourism sense, however, the area is relatively undeveloped, with these recreational features unlikely to achieve a sustainable competitive advantage for the region.

Having reviewed the assets and features of the area, however, we believe that with a strategic focus and approach, and commitment of substantive time and funds, that Melbourne Riverlands has the opportunity to build upon its natural features and heritage, and be promoted as a tourism region linked to Melbourne.

In undertaking this study, we have addressed the following key issues:

- The positioning and imaging of the sub-region as a tourism destination;
- Assessment of the appropriateness of the tourism structure within the region; and
- Assessment of the suitability of tourism projects being proposed.

We highlight our recommendations below:

2.1   *Image*

The Melbourne Riverlands region offers a diversity of product in terms of potential for both tourism and recreation development. Key attributes and opportunities for the area include:

- Cultural heritage and interpretation;
- Interpretation of aboriginal culture;
- Interpretation of nature;
- Festivals and Events;
- Art exhibitions and galleries; and
- Education and Training.

The primary strengths of the region that might afford it competitive advantage in terms of tourism, and upon which the image of the area should be developed, are:

- Cultural heritage and interpretation, and
- Interpretation of aboriginal culture.

The well developed features of the region, such as the Parks network and Natural flora and fauna, provide a strong and significant foundation for the development of the tourism experience. It is true, however, while extensive and of high quality, these natural assets are largely recreation focussed and unlikely to provide the region with a strategic competitive advantage upon which to build a tourism industry.

2.2 *Position*

The image for Melbourne Riverlands is that of a destination offering opportunities to experience and interpret cultural and aboriginal heritage, within a mainly nature based setting.

Linked with the opportunities for interpretation, we recommend the development of strong alliances with the Melbourne based Museum of Victoria and National Gallery.

In addition, the proximity of Melbourne Riverlands to, and travel time from, the CBD suggests that it is more closely aligned with the expectations of visitors to the Melbourne region.

We therefore recommend that the primary destination to which Melbourne Riverlands should be linked is the Melbourne Product region.

Secondary linkages with the Yarra Valley, Dandenongs and The Ranges might be appropriate in the medium to longer term.

2.2.1 *Target markets*

We have reviewed extensively the Roy Morgan Values Segments (1), upon which the Tourism Victoria Business Planning process has been based.

We have identified the following:

- The key target market should be the *Traditional Family Life* (TFL) Value Segment,

   Key travelling/holidaying characteristics include:

   - Enthusiasts for knowledge
   - High interest in specialty tours
   - Desire to interpret, and see and learn about nature

- Two secondary target markets also fit with the existing marketing orientation of Tourism Victoria, being the *Socially Aware* (SA) and *Visible Achievement* (VA) Values Segments.

   Key characteristics of the Socially Aware Value Segment include:

   - enjoy exploring rather than organised tours
   - interested in restaurants, art galleries, national parks and wineries
   - seek more up-market, relaxing holidays
   - strong fly/drive market

(1) The Roy Morgan Values Segments developed in conjunction with Colin Benjamin of the Horizon Network

Key characteristics of the Visible Achievement Value Segments include:

- consider their children in holiday planning
- very "value" conscious
- seek good value <u>family</u> holidays
- Holiday experiences include interpretive and family oriented activities, in a relaxed and non-exertive setting

- Although we do not believe these segments would be likely to stay overnight, they nonetheless hold a strong interest in undertaking activities strongly linked to the assets of the Melbourne Riverlands product region.

2.3 *Market Opportunities*

In the process of our research we have undertaken to identify potential areas for development in terms of Tourism, and the relative level of development of recreational and tourism assets within the region.

Key findings include:

- existing product within Melbourne Riverlands is more highly developed where the market is likely to be Recreation focused, such as the Parks Network, the Native flora and fauna, and the arts and crafts;

- Tourism strength and potential exists in:

    - Aboriginal culture,
    - cultural heritage and interpretation, and the Arts, and
    - small scale, high quality nature based interpretation;

- Undeveloped areas with tourism potential include:

    Accommodation, and

    Integrated convention and meeting facilities; and

- Tourism retail is unlikely to offer competitive advantage, as the existing urban retail precinct within MR serve a predominantly different purpose in our view to that which is likely to attract the tourist population.

2.4 *Tourism Structures*

Currently Melbourne Riverlands as a region, comprises 4 separate Local Tourism Associations. These associations:

- do not represent the entirety of the interests of the communities across the region,

- are not provided with guidance and support from a uniform regional umbrella body, and

- are largely focussed on product development and not region wide co-ordination, packaging and marketing.

We recommend the following tourism structure:

- Establishment of the Melbourne Riverlands Regional Tourism Association (MRRTA):

  - to develop and progress the tourism industry, and drive key tourism initiatives;

  - to provide the umbrella support for the existing local tourism associations;

  - to be comprised of private enterprise and Tourism industry representatives, and key government agency bodies including Melbourne Parks and Waterways and the Department of Natural Resources and Environment; and

  - in the formative years, to be largely comprised of local government representatives, to provide both funding contributions for tourism development, and a strong network to support and develop tourism.

The MRRTA should comprise representation from:

- the five local government municipalities that currently make up the Melbourne Riverlands (and additional future participants in the Melbourne Riverlands)

- key state government agencies that have a stakeholder interest in the development of tourism, including

  - Melbourne Parks and Waterways, and

  - Department of Natural Resources and Environment; and

- representatives of each of the existing four Local Tourism Associations.

We would recommend that direct local government involvement would be reduced after approximately three years, at which point a single, regionally nominated local government representative would remain and the local tourism associations would assume greater control, within the MRRTA.

We also recommend the appointment of a Regional Tourism Co-ordinator on a contract part-time basis, to assume responsibility for the promotion and development of tourism for the region.

It would be the responsibility of this individual to:

- increase the profile of tourism, by promoting tourism operators and businesses across the region;

- promote developments and increase potential private business investment;

- encourage education and training for the tourism industry;

- represent the tourism interests of the Region in the context of the MCMB; and

- co-ordinate regional marketing initiatives.

2.5 *Key initiatives*

This report focuses upon those initiatives that could provide a competitive advantage for Melbourne Riverlands, in a tourism sense. There are a small number of initiatives which we believe are strategic and which are likely to contribute to such a competitive position.

The objective in categorising these initiatives is to provide guidance to local government, both in terms of those initiatives that would be more likely to assist the development of tourism, and to provide a mechanism by which funding could be allocated for the forthcoming financial year. In the process of highlighting key initiatives, we have recommended that prior to funds being committed to certain projects, that local government support the undertaking of project feasibility studies, to assess both the likely usage, and therefore viability, of the proposal.

We have classed the initiatives as follows:

Primary

Those initiatives we believe are strategic and likely to provide the opportunity to extend and strengthen a tourism experience.

Secondary

Initiatives that we consider will more effectively provide support infrastructure to the development of tourism in the region.

Tertiary

Initiatives more consistent with a recreation focus for the region.

2.5.1 *Primary Initiatives*

Primary initiatives include:

i)   the further interpretation of the natural flora and fauna and traditional aboriginal heritage and culture and the inter-relationship of the Warrundjeri tribe with the Yarra River and the upper Yarra Valley;

ii)   the presentation and interpretation of Australia's early 19th Century artists;

Specific projects relating to these areas include:

Tikalara Cultural and Environmental Interpretation Centre, and

Tourist Heritage/Arts/Environment Trail.

iii) Petty's Orchard; and

iv)   other Interpretive nature based tours, marketed to the smaller exclusive groups seeking genuine eco-tourism/Australiana experience.

Each of these projects provide opportunity to link with major interpretative facilities within the City of Melbourne, including the National Gallery and Museum of Victoria, offering object based displays and exhibits for interpretation.

We recommend the ongoing support and continued regional development of festivals and integrated art exhibitions throughout the greater Melbourne Riverlands area.

2.5.2 *Secondary Initiatives*

Major secondary initiatives include:

i)   Tourism signage

Recommend that the Councils that form part of the Melbourne Riverlands area adopt the State-wide tourism signage guidelines and strategy currently being prepared by Tourism Victoria and VicRoads, for the development and funding of a multiple tier signage strategy for the State.

ii)   Education and Training

Recommend use of the hospitality, tourism and retail training facilities and services available at Box Hill TAFE and the Outer Eastern College of TAFE at Croydon, to further develop tourism training packages orientated toward servicing the training needs of the Melbourne Riverlands, and surrounding Yarra Valley, Dandenongs and the Ranges product region.

These training packages would be directed toward both existing and potential operators of the tourism services and attractions.

iii) Local government Tourism Policy

Recommend that local councils across the region establish consistent policies to create a framework that is supportive for tourism development. For example, in the areas of Accommodation development, such as Bed and Breakfast planning and promotion.

iv)   Establishment of Information Services

Recommend that key businesses be identified as locations where information services can be provided to visitors, both in collateral form, and through the provision of information by staff. We would consider that Petrol stations, and other establishments servicing through traffic (such as fast food outlets), would be suitable locations to provide this service.

v)   Accommodation

Recommend the support of private enterprise to invest in accommodation developments for both the Bed and Breakfast and Meetings and Conventions markets.

vi)   Regional Events

Recommend the provision of ongoing support and continued regional development of festivals and integrated art exhibitions throughout the greater Melbourne Riverlands area.

Such events should provide the mechanism by which to sustain visitor interest and movement throughout the region, and promote a unified tourism identity for the region.

2.5.3   *Tertiary Initiatives*

Tertiary projects include:

- Hendersons Seed Farm, Melbourne Parks and Waterways;
- Yarra Ramble; and
- The extended development of parklands and Yarra River corridor

2.6   *Implementation Plan*

In the development of the implementation plan we believe that priorities for attention should be given to:

Developing the image and raising the profile of tourism

- To educate the local community and businesses of the potential for tourism in the region, and its potential economic benefits;
- To develop a regional tourism map that promotes the existence, type of operation and location of all tourism operators and businesses across the region;
- To increase the profile of the tourism industry and its constituents, and develop opportunities for co-operative marketing through the local press and media; and
- To provide a framework that supports the development and growth of the tourism industry in the region, through the local government offices across the region co-ordinating a consistent set of tourism policies.

Establishment of Tourism Structures

- The establishment of the Regional Tourism Association, to establish a region-wide focus and support for tourism across both the local tourist associations and local government boundaries, and

- the appointment of a Regional Tourism Co-ordinator to direct the Tourism Association and co-ordinate the initiatives driving the development and promotion of tourism.

Enhancement of linkages and trails

- The linking of Melbourne Riverlands with the State-wide signage-strategy currently being undertaken by Tourism Victoria and VicRoads, for the development and funding of a multiple tier signage strategy for the State, and

- The development of Yarra river trails, and linkages across the River, in conjunction with Melbourne Parks and Waterways, with the view to moving visitors to the area off the established feeder routes, to explore other areas and thereby extend their visit and expenditure.

Promotion of the Art and Heritage product to the Melbourne market

- The establishment of strategic alliances with the Museum of Victoria and National Gallery to be a key initiative, to provide the opportunity to expand the awareness of, and interest in, the strength of the art and heritage assets of the region, and create the opportunity for competitive advantage;

- To provide support to the local Wurundjeri people in their endeavours to provide interpretive experiences of the traditional aboriginal heritage and culture, to the visitor. Permit approvals should be reviewed accordingly, and support provided for the completion of the Feasibility Study for the proposed Tikalara Cultural and Environmental Interpretation Centre, and similar interpretive facilities; and

- The development of the Arts/Yarra trail should be a priority to promote the arts and heritage strength of the region to the existing recreational visitors.

7.1 *Measurement of Achievement*

We have recommended key outputs achievable in the first twelve months of developing tourism within Melbourne Riverlands. It is our view that these outputs should be used by the MRRTA, the Regional Co-ordinator and local government, as a guide to prioritising their actions, and measuring their performance.

3   Image of Melbourne Riverlands

3.1   Introduction

Melbourne Riverlands as it is presently comprised, is a mix of both urban and urban rural municipalities, and is within easy commuting distance to the City of Melbourne. Melbourne Riverlands cannot therefore be considered a regional destination in a tourism sense.

At the interface with the Yarra Valley, however, the character of the region does change dramatically, to include small rural allotments, and expansive areas of public recreation space, mainly managed by Melbourne Parks and Waterways.

Extensive parklands are found throughout MR, where open space and recreation opportunities are provided and supported by Melbourne Parks and Waterways (MPW) and the respective constituent councils. There has been extensive support of such initiatives as the diversification of the extensive network of recreational trails throughout the region, offering opportunities for cycling and walking.

The region comprises major open spaces including parks and reserves, many situated along the Yarra River, such as the Yarra River parklands and Warrandyte State Park, and river trails, including the Main Yarra, Gardiners Creek, Mullum Mullum Creek and Koonung Creek.

The area also includes key recreational nodes for canoe launching, promoting the availability of water activities along the Yarra, presently located at Westerfolds Park, within Warrandyte State Park, at the Warrandyte Bridge and lower Homestead Road, Wonga Park.

The following SWOT analysis further highlights the key features of the region:

3.2   SWOT analysis

Strengths

- Natural assets, including untouched green wedges and wetlands, billabongs and swamplands (in close proximity to the CBD);

- Parks and recreational reserves, for passive recreation;

- Native flora and fauna;

- Arts and craft markets and facilities;

- A diverse collection of Festivals and Events;

- History of art, through the Heidelberg School of Art, and Museum of Modern Art, known both nationally and internationally within the arts community;

- Historical sites and heritage estates, displaying the remnants of aboriginal and European settlement, such as Tikalara Park, Schwerkolt Cottage, and Montsalvat;

- Planned development of an Environmental Centre at the High School site in Banyule, and potential inclusion of Cultural Centre;

- National trust estates and significant historical buildings, including Banyule Homestead, Ravenswood, Saxam (the Olympic Village) and the Mount Eagle Estate, designed by Walter Burley Griffin;

- Historical township of Warrandyte, the site of Victoria's first gold discovery in 1851, with major attractions including the wildlife, goldmining relics, wildflowers and water based activities, such as canoeing;

- local wineries and winery restaurants, including Lovegrove of Cottlesbridge, Kellybrook Winery & Restaurant and Yarra Valley Hills;

- Aboriginal sites of significance:
    - The Bolin Billabong (Manningham),
    - Pound Bend (Warrandyte), and
    - Currawong Bush Park;

- Significant Education and Training facilities;

- Ease of accessibility to and from areas within the region, given the effective public transport systems and major road networks;

- Large, well established, commercial retail facilities;

- Present acknowledgment and support by Council, of the importance of tourism and promotion;

- Proximity to the neighbouring high profile Yarra Valley and wineries; and

- strong business network eg. Eastnet and training programs through the Industry Development Centre and the Outer eastern College of TAFE in Croydon.

Weaknesses

- Poor signage;

- No visitor information centre, or similar central location from which to obtain tourism information and make bookings;

- Lack of co-ordinated and co-operative promotion and marketing, of destinational packages of activities and facilities;

- no package of tourism materials, such as a brochure, highlighting key regional features for distribution, in the local, Melbourne and regional marketplace;

- No cross-promotion within the region;

- No single, integrated body actively marketing the region, and establishing and maintaining links with the tourism industry;

- Availability of free recreation in the parklands for day visits, results in minimal visitor spend, and therefore minimal economic contribution to the local community;

- inadequate public transport to move visitors <u>through</u> the Melbourne Riverlands region; and

- Proximity to the neighbouring high profile Yarra Valley and wineries.

Opportunities

- Increased participation in, and visitors to, regional festivals;

- Cultural interpretation of both Art and Aboriginal heritage;

- Tour packages designed to integrate the common activities and facilities across the region;

- Consolidation of arts exhibitions;

- Proposed arts trail; and

- Increase in the convention and incentive market.

Threats

- Competition from recreational, entertainment, retailing and nature-based activities in both the Melbourne product region, and in regional locations;

- Competition from similar, better established facilities in the Yarra Valley, Dandenongs and The Ranges region, including:

  - wineries,

  - integrated convention facilities, and

  - art galleries;

- Encroachment of suburban development into nature based areas;

- Overlapping of tourism associations, promoting themes and tourism products that are not inter-related; and

- Bypasses and Freeway extensions (eg. Eastern Freeway) which will offer the option for drivers to change their travelling patterns, and avoid previous stopovers in the region.

3.3   Competitive Advantage

Our SWOT analysis highlights both a strong recreation focus, and a richness and variety of nature based assets. We have, however, had to consider whether such features can be linked to providing a competitive advantage for the area in terms of tourism, and whether they would be considered of real value in the State's priorities as far as strategic tourism development is concerned.

It is our view that such large expanses of open space and access to nature, flora and fauna, within close proximity to the City are not of themselves, able to offer a competitive advantage, as similar features are available across other parts of the State, where urban and rural areas meet. This is not to suggest, however, that these features are not highly significant in creating the foundations upon which the tourism experience can be developed. Rather, our point is that these features do not offer unique differentiation upon which to base a strong, long term industry.

Clearly, this natural environment must be protected and enhanced if it is to continue to support the development of tourism.

Exhibit 1 , opposite, the Recreation and Tourism Needs Assessment Matrix, assesses the features of Melbourne Riverlands in terms of their level of development, and potential to create a competitive advantage for tourism in the region, in a strategic sense.

In summary, the Matrix highlights the following:

- The assets with the greatest level of development offer the least opportunity for strategic competitive advantage. These include the recreation focused assets of the Parks network, and natural flora and fauna;

- The assets that would provide the greatest opportunity for competitive advantage in terms of tourism, are generally not highly developed, including opportunities to interpret the natural assets and the cultural and aboriginal heritage; and

- Tourism assets including retail, accommodation and convention facilities, although likely to enhance the tourism experience, are unlikely to affect the competitive positioning of the region and are particularly under-developed.

The matrix highlights the following key areas as offering the potential of real competitive advantage:

- Cultural heritage and interpretation,
- Interpretation of aboriginal culture, and
- Interpretation of nature and wildlife.

Secondary features that could also contribute to the growth of tourism in the region include:

- Festivals and Art exhibitions and galleries, and

- Education and Training.

The matrix highlights that these areas are at low to moderate levels of development.

In relation to tourism retail, we believe that the Warrandyte Village shopping precinct is situated in a setting, and offers retail products, that appeal to the tourism market, and provide a competitive advantage for this area of the Melbourne Riverlands.

It is our view, however, that the balance of the existing urban retail precinct within Melbourne Riverlands serves a different purpose to that which is likely to attract the tourist population. For example, the warehouse retail strip along Maroondah Highway generally provides specialist goods and services, and/or more expensive items such as household goods, furniture, electrical goods, furnishings and wholesaling. Similarly the Box Hill and Doncaster shopping precincts serve a local/regional shopping requirement.

Although research indicates that the warehouse shopping strip attracts visitors from across the State, it is not highly developed as a tourism destination nor is it likely to offer a unique experience. We therefore recommend that these retail centres be promoted in conjunction with the other tourism assets of Melbourne Riverlands.

We recognise also that with consistent streetscape planning and a focus on themed retail precincts, existing retail in municipalities such as Banyule, Maroondah and Whitehorse, could enhance their tourist support role. We stress again, however, that such precincts are unlikely to offer the region a point of strategic differentiation.

3.4   Priorities

The implications, therefore, in terms of key priorities for the development of the image of tourism are:

- High priority should be given to the effective marketing and development of areas related to:

    - the Middle Yarra River itself, and

    - the interpretation of Australia's art/cultural and aboriginal heritage, and developing linkages with institutions such as the Museum of Victoria and the National Gallery to those parts of the region able to interpret, in a more authentic setting, much of this history.

This development should be undertaken in the context of and making use of the natural features of the region, therefore suggesting development priorities will lie within the Cities of Manningham, Banyule and the Shire of Nillumbik.

Notwithstanding support for development in these nature-based areas, it should be done in such a way to ensure protection of the environment and to enhance the quality of the tourism experience.

- Lower priority should be given to the development of accommodation, and convention and meeting facilities, with the purpose of improving the region's tourism image.

Nonetheless, the private sector should be encouraged in the development of these facilities, via a consistent and clear regional policy and planning framework.

Given these priorities, the Cities of Maroondah and Whitehorse will in our view assume a support rather than primary role in the development of tourism. Principle involvement is likely to lie in areas such as:

- provision of visitor information services and/or facilities, and

- provision of other support services, such as education, training, commercial services, trading supplies etc.

4   Positioning of Melbourne Riverlands

4.1   Linkage with Melbourne

The following key features of Melbourne Riverlands have been identified:

*   natural environment, and

*   culture and heritage.

In turn, the greatest potential for competitive advantage has been identified as the development, promotion and interpretation of Australia's 19th Century art and our aboriginal heritage through linkages with key Melbourne based museums and institutions.

On reviewing available data, we conclude:

*   No evidence is available to support the view that Melbourne Riverlands might appeal as a stopover destination, enroute to a more regional destination, such as the Yarra Valley;

*   The Region does not offer the experiences and opportunities sought by the overnight visitor market; and

*   The Region better suits the day visit/recreation market.

It is therefore our recommendation that the Melbourne Riverlands seek to establish linkages with the Melbourne product region.

Secondary linkages with the Yarra Valley, Dandenongs and The Ranges may also be appropriate, however, in the medium to longer term.

4.2   Target markets

In undertaking this study, and the preparation of the Regional Tourism Development Plan for the broader Yarra Valley, Dandenongs and The Ranges region, we have reviewed extensively the Roy Morgan Values Segments (1), upon which the Tourism Victoria Business Planning process has been based. It is on the basis of these Values Segments that Tourism Victoria has developed its market targeting.

In reviewing the visitor characteristics and travel patterns of these Values Segments, in conjunction with the assets and features available within Melbourne Riverlands, we believe the primary target market that best fits the profile of the region is the *Traditional Family Life* (TFL) segment.

In addition, two secondary target markets that also fit with the existing marketing orientation of Tourism Victoria, are the *Socially Aware* (SA) and *Visible Achievement* (VA) Values Segments.

(1)   The Roy Morgan Values Segments developed in conjunction with Colin Benjamin of the Horizon Network

The personality characteristics of TFL include:

- middle-aged, home owners with relatively stable incomes;
- very family-oriented, with strong desire to keep in touch with family; and
- Health and spirituality dominate their experiences .

Their key travelling/holidaying characteristics include:

- Enthusiasts for knowledge;
- High interest in specialty tours; and
- Desire to interpret, and see and learn about nature.

The heavily nature based assets of the Melbourne Riverlands, within such close proximity to Melbourne, and the opportunities to interpret both art and aboriginal heritage should appeal to this target market.

The key characteristics of the SA segment include:

- enjoy exploring rather than organised tours
- interested in restaurants, art galleries, national parks and wineries
- seek more up-market, relaxing holidays
- strong fly/drive market

The key characteristics of the VA segment include:

- consider their children in holiday planning
- very "value" conscious
- seek good value family holidays
- Holiday experiences include interpretive and family oriented activities, in a relaxed and non-exertive setting

Although we do not believe these segments would be likely to stay overnight in the Melbourne Riverlands region, they nonetheless hold a strong interest in undertaking activities linked to the existing assets of the area.

4.3   The Name

In reviewing the choice of name for the 'Melbourne Riverlands', consideration must be given to:

- the development of a clear image and brand for the region;
- key features and nature of the experience; and
- geographic location, and recognition.

Essentially, the region name tag should reflect the key attributes of the region and reinforce the sense of branding and geographic identity of the area.

We have isolated the key features as relating to the natural environment, arts, culture and heritage, and have recommended that Melbourne Riverlands establish linkages with the Melbourne Product Region.

We have highlighted that a key feature of the area, and underpinning a significant number of the parklands and trails, is the Yarra River. As a significant geographic feature of Melbourne, providing linkages across the State, it is our view that its effectiveness as a trademark for the region should not be under-estimated.

It is our view that the current name of Melbourne Riverlands provides adequate direction in terms of the primary market, being Melbourne, and implies an association with the Yarra River.

In assessing the positioning for the region, we have suggested that the Cities of Maroondah and Whitehorse, not bounded by the Yarra River, would undertake a support role in developing tourism in the region. The use of the term Riverlands, therefore, does not isolate these areas, as primary tourism development and visitation is likely to occur in the other areas of the region, situated around the River network.

In conclusion, therefore, without having assessed the level of public recognition of the region and its features, and without having tested alternate names in the marketplace, it is our view that the existing name of Melbourne Riverlands remains appropriate.

5   Tourism Structures

5.1   Current Situation

Currently there are four Local Tourism Associations within the Melbourne Riverlands region that have been established to support the development of tourism. They include:

Plenty Yarra Community Tourism Association (PYCTA)

The Plenty Yarra Community Tourism Association is comprised of a mix of local operators, government, council and business and community representatives, to develop sustainable "environmentally aware" tourism in the region. The Region comprises the local government areas of Darebin, Banyule, Whittlesea, Murrundindi, Nillumbik and Manningham. (More recently, the Cities of Maroondah and Whitehorse have been cited as potential members).

This association was established in 1993/94 and secured federal government funding for the development of a regional tourism strategy, released on 17 May, 1996.

The primary objective of PYCTA is the development of a sustainable regional tourism industry, which supports community interests and needs while protecting, enhancing and preserving the region's environmental, cultural and historical values and assets.

Valley of the Arts Tourism Association (formerly Warrandyte Tourism Association)

The Warrandyte Tourism Association was established in May 1996. Its members are predominantly operator focused, including operators of local wineries, restaurants and hotels, and art and craft galleries, together with park rangers and representatives of the local Wurrunjeri Aboriginal tribe.

This association was initially established to promote the tourism product available within the Warrandyte/Melbourne Riverlands areas. While still maintaining this initiative, its members are also currently in the process of establishing links with the Yarra Valley region, through membership of the Yarra Valley Regional Tourism Association.

Yarrambat Tourism Association

The Yarrambat Tourism Association has been established to oversee the promotion and implementation of specific tourism projects, and is sustained on a project by project basis, within the former City of Diamond Valley, now the Shire of Nillumbik.

Notwithstanding the project focus of this association, a second objective is to cross promote neighbouring regions, in order to direct potential tourism flows through Yarrambat.

The association considers it's role temporary, should Council consider directly supporting tourism development in this area.

Plenty Valley Arts Association

This existing Local Association, active within the arts field, has been established to promote the arts, culture and heritage of the Plenty Valley area. Initiatives include the development of an artists trail and preservation of significant arts sites.

The association is based in Whittlesea, and considers its priorities to rest with cultural tourism.

As they currently stand, none of these local associations appear to effectively represent the diversity of interests across the region, nor do they operate under the guise of a single uniform regional umbrella body, marketing the region, nor providing support and consistency toward the development of a common tourism product across the region.

5.2   The Way Forward

We recommend the development and implementation of the following tourism structure for Melbourne Riverlands. The tourism structure is highlighted in Exhibits 2 and 3.

5.2.1   The Structure

The Tourism Structure proposed has been designed in two phases, each of which is to provide a supportive framework in which tourism within the Melbourne Riverlands is provided the opportunity to grow and then be sustained.

The first phase is based around the formative years of tourism development for the region, and focuses upon the extensive involvement of local government supporting the growth of tourism. We would anticipate that this growth period should extend no longer than about three years.

The second phase, therefore, addresses the transition in structure that would provide the framework for sustaining the tourism industry in the region, beyond this three year period.

The Formative Years

In these early years, we would recommend the establishment of the Melbourne Riverlands Regional Tourism Association (MRRTA), comprising a membership base of no more than twelve, and no less than six, representatives.

This Regional Tourism Association should have as long a life as that of the tourism industry in this region, although its role and composition will change significantly as the tourism industry moves from its formative developmental years, to being well established and sustainable.

In the formative years, the MRRTA would be unlikely to be able to move forward and to overcome the current low level of recognition of Melbourne Riverlands as a tourism destination, without significant investment of time and money.

It is also clear that the local tourism industry is relatively immature and unlikely to have the depth and breadth of representation necessary to either fund or drive tourism development in the short term.

We therefore propose, and highlight in *Exhibit 2* , that the MRRTA be largely comprised of local government representatives, to not only provide funding contributions for tourism development, but to provide a strong network that can jointly support and develop tourism. Effectively, we believe continuation of the drive, commitment and enthusiasm exhibited over the last three years by the Melbourne Riverlands Working Group will be essential to success.

The MRRTA should comprise representation from:

- the five local government municipalities that make up the Melbourne Riverlands (in addition to municipalities that form part of Melbourne Riverlands in the future years);

- key state agencies that have a stakeholder interest in the development of tourism, including

    - Melbourne Parks and Waterways, and

    - Department of Natural Resources and Environment; and

- representatives of each of the existing four Local Tourism Associations, that would provide the industry and operator input into the MRRTA; such as operators of tourist attractions, accommodation, bed and breakfast, restaurant and conferencing facilities, and private enterprise, including commercial operators providing support services for tourism.

    The Local Tourism Associations should be represented as the key bodies that provide the visitor services to the region, and are responsible for actioning the product development initiatives supported by local government.

At this juncture, the question of geographic coverage is also important. Our focus in this study has been exclusively on the local government areas of Manningham, Banyule, Nillumbik, Maroondah and Whitehorse. We would, however, support expansion of the coverage of the Regional Association to include neighbouring areas, should a review of their product strengths identify synergies with the proposed imaging and positioning of the existing "Melbourne Riverlands" area, as outlined earlier. In this case, therefore, any additional municipalities that join Melbourne Riverlands should also be represented on the MRRTA.

The Growth Years

The direct involvement of local government in "driving" the development of tourism and the MRRTA, should not be ongoing, but rather for a pre-determined period of time of approximately three years. This time period should be sufficient, in our view, to provide the guidance, support and funding necessary to encourage the growth of the local tourism industry.

Success will be measured in terms of the speed of transition from a local government dominated association to that which is lead predominantly by the private sector. This structure is highlighted in *Exhibit 3*.

At this point we would envision a single, regionally nominated, local government representative would remain on the MRRTA, and the Local Tourism Associations (including tourism operators and industries) and relevant government agency bodies would assume greater control.

Success should be further measured by the increased level of funding being contributed by these operators themselves, with ongoing but significantly less reliance upon local government funds.

We would, however, expect that local government should be prepared to continue to support non-commercial ventures that cannot otherwise be funded by private enterprise, and that will have clear tourism benefits for the integrated region.

5.2.2 *Role of the Melbourne Riverlands Regional Tourism Association (MRRTA)*

The primary role of the Melbourne Riverlands Regional Tourism Association (MRRTA) and its members will be to develop and progress the tourism industry, and drive key tourism initiatives. It will be responsible for the marketing of the services and products that are offered within the region.

It's members will work together and provide the necessary support, both financial and administrative, together with the necessary management skills and experience, to provide tourism the greatest opportunity to grow to being a sustainable industry.

The role of its members, with significant local government inclusion and influence, will reflect their recognition of the economic importance of tourism in this sub-region.

The MRRTA should be encouraged to join the Melbourne Convention and Marketing Bureau (MCMB), in order to be able to provide its members with access to Melbourne Product region activities and provide them with opportunities to participate in co-operative marketing initiatives.

The individual constituent members of the MRRTA might also be encouraged to join the MCMB, to capitalise upon the opportunities associated with both the Melbourne Region and Marketing, Incentives, Conference and Exhibitions (MICE) initiatives.

As secondary linkages will most likely exist with the Yarra Valley, Dandenongs and the Ranges, operators could choose to be affiliated with this regional association in addition to, and/or in lieu of, membership with MCMB.

In association with the MCMB, therefore, the MRRTA should undertake key marketing initiatives, including:

- the joint development of a map highlighting the key tourism assets, locations, and activities available across the region;

- the effective distribution of this map to strategic locations throughout the region, where visitors are likely to stop or pass through, such as Service Stations, to assist in raising the profile of tourism across the region;

- the creation and promotion of trails and packages that would increase access to, and draw visitors through, different areas across the region;

- developing promotional packages with Melbourne based interpretive facilities, such as the National Gallery and Museum of Victoria;

- the education of the local community and businesses, in relation to how they can assist in supporting and promoting tourism;

- the identification of product gaps, and the investigation of their feasibility;

- to encourage and plan for the development of regional events and festivals;

- forging links with other Regional Tourism Associations; and

- overseeing co-ordination across the Melbourne Riverlands region.

To this end, and in the context of creating a tourism culture, there is also an important role to be played by the likes of local press and community radio, in fostering support for tourism in the region.

5.2.3 Administrative resourcing of the MRRTA

If progress is to be achieved in developing tourism in the compressed timeline proposed, we believe that resources be made available via local government to provide administrative support to the MRRTA in its initial years. Although it should be a medium term goal of the MRRTA to provide the necessary administrative services, it would be unlikely, in our view, that they might be resourced from within industry in the short term.

Presently local Councils have the administrative facilities available, yet do not have the resource of a dedicated Tourism Officer role. It is proposed, therefore, that a Regional Tourism Co-ordinator is appointed on a contract part-time basis. It would be the role of this individual to provide administrative support and oversee the pursuit and development of tourism for the region.

Primarily, this individual would co-ordinate the activities undertaken by the MRRTA and carry the momentum for developing and supporting tourism.

We would recommend that this position be jointly funded by the existing local government Working Group members for an initial three year period, with an annual review of performance, highlighting the commitment by local government, to the development of the tourism industry.

Funding of the Regional Co-ordinator should be allocated based upon the strength of the tourism product within the particular municipality. We would not consider it reasonable, therefore, that areas that are expected to provide only a supporting function toward the development of tourism, such as the Cities of Maroondah and Whitehorse, be expected to share equally in the cost of funding the Tourism Co-ordinator.

We have estimated that the cost of this position should not exceed $30,000 per annum plus expenses, based upon part-time contract employment. We have estimated work related expenses, including such items as travel expenses and on costs, would represent an additional $20,000 per annum. While cost sharing must necessarily be the subject of discussion between the parties, the cost could be split as follows:

Tourism Co-ordinator	Municipality	% share	$ share
$50,000	Manningham	25%	$12,500
	Banyule	25%	$12,500
	Nillumbik	25%	$12,500
	Maroondah	12.5%	$6,250
	Whitehorse	12.5%	$6,250

The role of the Regional Tourism Co-ordinator

Key responsibilities to be undertaken in assuming the co-ordinating role of the MRRTA would include:

- to raise community awareness of the benefits of tourism;

- to promote developments oriented toward deepening the tourism experience, and subsequently enhance appropriate private business investment in the region;

- to encourage a greater level of professionalism and training within the region and the encouragement of the development of appropriate courses by the resident academic institutions; and

- to develop specific industry forums comprised of operators to develop and promote initiatives from within the region.

In addition to these responsibilities, which are shared with the Regional Tourism Association members, the Regional Tourism Co-ordinator would also undertake the necessary administrative and treasury tasks required to ensure the efficient operation of the Association.

Irrespective of the option pursued, and over and above the administrative support to be provided, the members of the MRRTA should also consider funding support for initiatives such as the development of artists trails and networks and the further development and promotion of aboriginal interpretative facilities such as Tikalara and Westerfolds Park. Over and above these initiatives, local government and Melbourne Parks and Waterways should also anticipate that they continue to support the further development of recreation opportunities in accordance with their annual priorities.

5.2.4 Membership

We have recommended that the MRRTA be encouraged to join the MCMB. The appropriate membership category for the Regional Tourism Association would be that of *Associate* , at a cost of $250 per annum. This would provide the following benefits and services:

*   Listing in Members' Services Directory,
*   access to Tourism Victoria's programs, and
*   access to targeted members' advertising.

Should the MRRTA consider it beneficial to join at a membership level that would include advertising and promotion benefits associated with the Convention and Incentive market, this would require a total per annum contribution of $800.

It is our view, however, that given the nature of the tourism product within the Melbourne Riverlands, that the Associate membership level would be appropriate at this time.

Notwithstanding our recommendation that the MRRTA seek Associate level membership, we would support individual operators also considering MCMB membership. Similarly, should the individual operator prefer to be affiliated with the Yarra Valley product region, then membership within that Product region's membership structure should also be supported.

6   Initiatives proposed for Melbourne Riverlands

In assessing the suitability of tourism projects, KPMG have reviewed the literature provided by the five municipalities, Melbourne Parks and Waterways and DNRE, relating to the background and objectives of a range of potential proposals. We have also familiarised ourselves with municipalities and the sites for the proposed developments.

In terms of this report, the strategic focus is upon competitive advantage, and the mechanisms by which Melbourne Riverlands could achieve this in a tourism sense. There are a small number of initiatives which we believe are strategic and which are likely to provide the opportunity to extend and strengthen a tourism experience.

For the purposes of prioritising proposed developments, and therefore providing active guidance in terms of budget allocation, we have classed such initiatives as Primary.

Initiatives that we consider will more effectively provide support infrastructure to the development of tourism in the region we have classed as Secondary, while those consistent with the existing recreation focus of the region, as Tertiary.

6.1   Primary Initiatives

In our view Primary initiatives include:

i)   the further interpretation of the natural flora and fauna, traditional aboriginal heritage and culture and the inter-relationship of the Wurundjeri tribe with the Yarra River and the upper Yarra Valley, and

ii)   the presentation and interpretation of Australia's early 19th Century artists, including such names as Sydney Nolan, Arthur Streeton, Albert Tucker, Tom Roberts, Charles Condor, Fred McCubbin, Joy Hester, and Danila Vassilieff, influenced by Arthur Boyd, and links with Joseph Brown, in association with the Museum of Modern Art at Heide.

Projects being proposed, for which we would recommend Council and/or government agency support, are highlighted below.

We consider the first two projects as being of primary significance, as they offer the following:

* the opportunity to link with the National Gallery of Melbourne, which is renowned for the strength of its 19th Century art collection, and

* the opportunity to link with the Museum of Victoria, considered to have one of the largest and most impressive collections of aboriginal artefacts and which will become a major focus of the new museum destined to open in the year 2000.

Tikalara Cultural and Environmental Interpretation Centre

The Tikalara Aboriginal and Cultural Centre is proposed to provide facilities for environmental and cultural interpretation and education. The proposed site for development is a culturally significant area for the Wurundjeri Aboriginal community, and should provide opportunities to interpret and participate in their activities and history.

Currently Melbourne Parks and Waterways are undertaking a needs analysis and feasibility study for the proposed Centre. These two studies are proposed to determine the level and type of usage of the Centre by the Wurundjeri Aboriginal community and the commercial viability of the project. Should the Centre prove not to be viable, the issues of ownership and ongoing funding must then be addressed, and commitment by the appropriate organising body, such as Council or Melbourne Parks and Waterways, be given.

The study currently underway should consider:

• the market for this environmental and cultural learning centre and camps;

• the potential for showcasing aboriginal heritage for the entire product region;

• potential links with the new Museum of Victoria aboriginal displays and programs;

• the benefits of it's link with other tourism assets, given it's proposed location on the Yarra Trail; and

• potential funding opportunities.

In addition, a number of other specific initiatives have been proposed by the Wurundjeri people, relating to the interpretation of indigenous heritage. These involve the establishment of tour routes around sites of significance, that educate the visitor about aboriginal heritage in the area. Some sites of Aboriginal significance situated within the Melbourne Riverlands area include Tikalara, Banyule Billabong, the Cock Property, Glynns, Longridge and Morrisons.

It is our view that such tours and sites would be a valuable asset for the region, and provide a useful mechanism by which to draw visitors through the region. Each proposal will, however, require detailed assessment of how it will be established and managed and the funding available.

Tourist Heritage/Arts/Environment Trail

The proposal for the development of a Yarra trail incorporating artists and environmental signs along the walking/cycling path has been developed jointly through PYCTA, the City of Banyule, Melbourne Parks and Waterways and the Melbourne Riverlands Working Group. It is an initiative that should be supported. It will be necessary, however, to firstly appoint consultants to undertake a Feasibility Study for this proposed development that will test the likely support for the concept.

This development would provide the opportunity to:

- honour the artists of their time;

- promote the history and significance of the area;

- establish links with the National Gallery ;

- develop signage with eco-tourism information, identifying native flora and fauna, and significant wetlands, such as billabongs; and

- cross-promote other regional assets, such as the Museum of Modern Art at Heide and Montsalvat, and other national heritage estates (eg. Walter Burley Griffin Estate).

This trail also proposes the development of a pedestrian bridge across the Yarra River to link Warringal Park on the western banks and Banksia Park and the Heidi Museum of Modern Art on the east. This initiative should be supported in our view, as it would effectively link these two areas, and enhance the accessibility and exposure of the Heidi Gallery area.

Petty's Orchard

This project proposes the conversion of the existing commercial apple growing operation into a "boutique quality experience", promoting food and wine tourism in this area.

This project aims to:

- combine the indigenous surrounds with the natural produce being grown, by marketing and selling natural foods such as seeds, fruits and herbs, and

- to develop a boutique winery, adjacent to the Pettys Orchards site.

We would recommend that consultants be appointed to undertake a feasibility study to determine the viability of this project.

Highly interpretive nature based tours

We would recommend the design and marketing of interpretive nature based tours, marketed to smaller, exclusive groups seeking a genuine eco-tourism/Australiana experience.

The richness in nature based assets of parts of the Melbourne Riverlands should be capitalised upon in terms of such activities as night walks, and wildlife habitat watching and education.

We would anticipate that such activities would appeal mainly to the FIT market, in conjunction with other holiday activities. We would not assume that visitors to such attractions would stay overnight in the region, but rather have travelled from the Melbourne Product region.

6.2   Secondary Initiatives

The secondary initiatives being proposed within the Melbourne Riverlands, are those which provide the support infrastructure to strengthen the potential for tourism development in the region. They include:

Diamond Hills Botanic Garden, Flintoff Hills, Greensborough

This specific proposed development includes:

- amphitheatre,
- lookout tower, and
- restaurant and gallery.

The gallery is proposed to comprise arts and crafts and a Cultural Centre depicting the history of the Nillumbik area. This development aims to emphasise landscape, environment, history and culture.

Although not of primary significance to the region overall, this development would nonetheless provide a facility within the Shire of Nillumbik, that supports the image of tourism.

Currawong Bush Park - Environmental Arts & Cultural Living/Learning Centre

This proposed development is based around an active centre for learning and interpretation. Activities to be offered include:

- Meditation and relaxation, such as Tai Chi,
- sculpting,
- painting,
- juggling, and
- music and dance.

We are in agreement with the stakeholders of this project that it would complement the proposed development of the Tikalara Aboriginal Cultural Centre, given that Currawong also offers sites of significant Aboriginal history. Jointly, these two facilities would strengthen the visitor experience.

It is our recommendation therefore that support be provided firstly, to appoint consultants to investigate the feasibility and desirability of establishing this Centre at Currawong.

Bolin Bolin - Bulleen Nursery Tourism Marketing Proposal

This development proposes a visitor precinct around Banksia Park and the Banksia Street Bridge, providing a link between the gardens (Heide Kitchen garden and Banksia park), arts (Museum of Modern Art at Heide) and aboriginal culture (Bolin Bolin billabongs) and heritage (eg. Burley Griffin estate) along the Yarra Trail.

This proposal is consistent with the Yarra Valley Parks Management Plan, aimed at protecting and enhancing the rich cultural heritage of the area, through the development of suitable outdoor recreation, and protection of the natural environment.

This proposal could support the development of tourism in the region, through its linkage with the proposed Heritage/Arts/Environment trail, being one of a number of attractions that the visitor might experience.

It would be appropriate, in our view, to test the viability of these attractions and their potential appeal to the visitor, in conjunction with the feasibility study recommended for the Heritage/Arts/Environment trail proposal.

Tourism signage

Like most regions of Victoria, the Melbourne Riverlands suffers from a lack of consistent and sufficient quality and quantity of tourism signage to direct visitors to, and through, the region. Particularly, the need to link features and facilities in a fashion that is easily recognisable is a common deficiency and one evident within this region.

Tourism Victoria and VicRoads are currently undertaking a major State-wide strategy for the development and funding of a multiple tier signage strategy for the State. The key principle driving this strategy concerns the need to provide effective and consistent communication to the traveller, to inform them of information services and the location, and types, of attractions available in a particular product region.

The principles of this strategy need to be actively supported by the municipalities within Melbourne Riverlands, to ensure that tourists are encouraged to move off the established feeder routes and explore the hinterland and thereby extend their stay and expenditure, and that similar types of attractions throughout the region are represented by the same signage symbol.

Signage must be approached on a regional basis. We therefore recommend that the MRRTA undertake the following:

- establishment of a Regional Signage Committee;

- investigate signage priorities for the region;

- undertake an audit of the key attributes and strengths of the region, and review previous research and reports, to develop potential signage themes and guidelines, in association with an appointed Signage consultant; and

- develop recommendations to carry forward to the Signage Committee.

While the quantum of funding support available at the local level from the Tourism Victoria/VicRoads study is not clear at this time, the aforementioned recommendations should be couched in the context of local government funding support being necessary.

Education and Training

Melbourne Riverlands is presently serviced by the two major tertiary education facilities of Box Hill TAFE and the Outer Eastern College of TAFE at Croydon, with a strong focus on the hospitality sector. Currently Outer Eastern is represented on the Shire of Yarra Ranges Economic Development Committee, working directly with the Shire in the planning and implementation of training programs for the winery and tourism industry.

Outer Eastern offers courses in Hospitality and Tourism training to VCE students, of which approximately 70% would be residents of the Eastern suburb municipalities that make up Melbourne Riverlands. In addition, they offer retail training to the Ringwood and Whitehorse areas, including Croydon, Ringwood, Doncaster and Lilydale. This training is provided to the smaller retail operators, to support the growing strength in retail business in this area of the Melbourne Riverlands.

It is our view that opportunity exists, therefore, for Box Hill TAFE to also develop tourism training packages orientated not only towards servicing the training needs of the Melbourne Riverlands but, more broadly, the remainder of the Yarra Valley, Dandenongs and the Ranges product region and those adjoining product regions to the north and east.

Aussie Host

Aussie Host is a program orientated toward the provision of customer service training to front line staff across all business types likely to have contact with visitors.

There needs to be recognition throughout the Region that tourism, and even recreation, is an industry which will impact broadly upon the regional economy. It is therefore critical that commercial businesses encourage operational staff to develop a service culture, and as appropriate, to widely participate in the Aussie Host program.

A local host organisation has been established at the Outer Eastern College of TAFE, that provides qualified trainers to facilitate the one-day Aussie Host course, either on the campus premises, or at a venue selected by the tourism operators undertaking the training.

It is our recommendation that this training be undertaken, particularly by operators new to the tourism industry, to assist in the development and implementation of a service oriented culture throughout the Melbourne Riverlands region.

Establishment of Information services

We do not believe a centralised information centre or booking facility is necessary in the region until such time as the available tourism product has been further developed, and could guarantee the delivery of a quality tourism experience.

The formative years should represent the opportunity to assess, firstly, the need for an information centre, and if so, then the most appropriate location to establish such a centre.

Notwithstanding that a centralised facility might not be developed in the region in the short term, other facilities should be available as an ongoing resource for providing visitor information. We would recommend that businesses such as Petrol stations, and other establishments servicing through traffic (such as fast food outlets), should be encouraged to provide promotional and directional material to inform potential visitors of the assets and means of access within the region.

As stated in Section 3.4, we would anticipate that the Cities of Maroondah and Whitehorse would play a key role in the provision of such services.

In delivering this information, we would recommend that proprietors of these service establishments ensure that they, and their staff, are knowledgeable concerning the product available to promote. In conjunction with the MRRTA, the relevant establishments selected to house this information, should undertake both Product familiarisation and Customer Service training.

Local government planning and zoning regulations

We recommend that local councils across the region ensure consistency in the setting and delivery of their policies relating to tourism, with the objective of providing an environment that supports the development of tourism, and where private enterprise can confidently choose to invest in tourism development.

Key issues that Councils should address include:

- the role of tourism;
- recognition of the interaction between tourism and the natural features of the region, and the need to protect the environment;
- development of designated tourism precincts;
- financial support to the sector;
- planning and zoning controls and regulations;
- approval procedures and policies; and
- involvement in regional tourism associations and bodies.

For example, Councils should review the principles underlying current planning policies, to consider the applicability of restrictions regarding the development and promotion of types of accommodation, in particular Bed & Breakfasts.

It is our recommendation also that a review of the effectiveness of the public transport system that operates between the municipalities within Melbourne Riverlands be undertaken by the local Councils. Presently public transport is effective in delivering visitors to the region, however requires improvement in scheduling and accessibility within the region.

Accommodation

Support should be provided to private enterprise choosing to develop accommodation within the Melbourne Riverlands, for both Bed and Breakfast, and Convention facilities.

It is our view that niche opportunities are likely to exist in these different markets.

For the Bed & Breakfast market, opportunities are likely in such areas as:

- Greensborough,
- Wonga Park,
- Warrandyte, and
- Diamond Creek,

and utilised by both the Eastern metropolitan and broader Melbourne market.

For the accommodation market associated with meetings and conventions, the greatest demand should continue to be sought in business and commercial areas within Melbourne Riverlands, such as Ringwood, Box Hill and Doncaster. The greatest demand should stem from local businesses and the Visiting Friends and Relatives market.

In addition, we envisage limited opportunities for Convention facilities situated in a more rural setting, providing the sense of open space generally sought by the overnight convention market. Key locations would be Eltham, Greensborough, Warrandyte and Wonga Park.

Regional Events

The ongoing support and continued regional development of festivals and integrated art exhibitions throughout the greater Melbourne Riverlands area is necessary. Such events can provide the mechanism by which to sustain visitor interest and movement throughout the region, and promote a unified tourism identity.

Our research has indicated that benefit could be gained through maintaining linkages between these events and those occurring within the Melbourne product region. The strength of these activities is highlighted below:

Festivals

Melbourne Riverlands is presently the home for annual festivals, including:

- The Banyule Festival,
- The Banyule Jazz Festival,
- Diamond Creek Town Fair,
- Envirofest,
- Festival in the Foothills, Maroondah,
- The Montsalvat Poets Festival,
- The Montsalvat Jazz Festival,
- The Nillumbik Festival,
- Pettys Orchards Festival,
- The Warrandyte Festival, and
- Westerfolds Recreation Festival.

In addition, the following festivals are being developed:

- Mullum Mullum Festival,
- Templestowe Village Festival, and
- Wonga Park Festivals.

These festivals are a means of promoting the region and drawing greater numbers of visitors across the municipalities, and as such should be recognised as critical events within the calendar year of the region.

They do, however, represent a mix of recreational and tourism opportunities. It is our recommendation, therefore, that an assessment of each festival should be undertaken to determine if their key features might achieve a competitive advantage in terms of tourism.

Should this assessment highlight that particular festivals have the potential for competitive advantage, then these and other similar proposed events should be developed and promoted to attract the higher yield tourism market.

Conversely, should assessment of a festival highlight that it attracts mainly the local community, and serves a mainly recreational purpose, it should continue to be supported by local government as a showpiece for the region, however, would not require as significant marketing and promotional efforts.

Notwithstanding the recommendation that greater support should be provided to festivals that might attract a tourism market, the MRRTA should nonetheless ensure a continuity and consistency of all regional festivals, by:

- identifying specific gaps in relation to the scheduling and type of festivals;

- developing a co-operative theme for the festivals;

- developing a schedule of events across the region and calendar year, including consideration for expanding the number of festivals (with the view to preventing the clashes in scheduling that presently occurs);

- establishing linkages with key operators in the region to host these festivals; and

- developing linkages with similar activities in the broader metropolitan region, therefore increasing exposure to these outer areas.

Art exhibitions

Initiatives have been undertaken to develop a regional approach to art in the North-eastern parts of Melbourne Riverlands, within the municipalities of Manningham, Nillumbik and Banyule.

In this process, artworks have been pooled and displayed in a common location. This has the effect of integrating the assets of the region, and raising the cultural identity for the region overall.

Following the success to date of regional art initiatives, Melbourne Riverlands should review the appropriateness of the further integration of artworks from Maroondah and Whitehorse.

Issues that should be considered include:

- the establishment of regional cultural committees, to identify strengths across the region;

- the development of a regional cultural policy, to foster an integrated approach to the promotion of arts and culture in the region;

- provision of advice regarding the necessary steps required to achieve critical mass from such art exhibitions; and

- the preparation of a strategy that most appropriately specifies the conduct of these exhibitions, including the appropriate venue and scheduling, and the assessment of the appropriateness of including the whole region, or pooling artworks based on geographic locations.

Both Festivals and art exhibitions are strategic initiatives to develop a unified tourism identity for the region.

6.3 Tertiary Initiatives

This third tier of initiatives are those which we consider to be focused primarily upon **recreation** pursuits. Their primary impact is likely to be in the promotion of a greater level of recreation and short trip activity for those residing in the eastern suburbs, rather than contributing significantly to the tourism experience of the region.

Although it has been recommended that a strategic focus be maintained, and greater support be provided to the development of the primary and secondary initiatives, the following tertiary developments should nonetheless be pursued as the opportunities and resources become available.

Such projects include:

Hendersons Seed Farm, Melbourne Parks and Waterways

This project proposes the redevelopment of the existing seed farm adjacent to Birrarrung Park to capitalise upon the tourism assets of the natural surrounds and the Yarra river.

This project proposes the development of:

- a recreational reserve and playground;

- tea rooms; and

- boat hire

Yarra Ramble

Melbourne Riverlands should embrace this proposed tourism development along the Yarra River, which would provide marketing opportunities for the restaurant, galleries and art and craft exhibitors and facilities along the river.

Extended development of parklands and Yarra River corridor

Melbourne Parks and Waterways (MPW) have proposed initiatives to improve recreational opportunities within the public open space that it manages, for the benefit of the broader metropolitan market.

A number of these projects and initiatives proposed would, in our view, provide a worthwhile adjunct to both a tourism and recreation experience. For example, the promotion of kiosk and refreshment facilities within the park network itself.

The promotion of such facilities would provide a considerable fillip to the visitor experience and promote the retention of discretionary expenditure within the region. However, should MPW and local government pursue such projects, it should, in our view, be in the context of the promotion of recreational pursuit rather than a belief that they are likely in any significant fashion to contribute to the tourism experience of the region.

We would therefore consider it the role for local government and MPW to determine their preparedness to underwrite ongoing operating deficits of such businesses, should there not be strong private sector interest.

6.4   Summary

In summary, it is our recommendation that in the formative years of tourism development for Melbourne Riverlands, that the primary areas of focus should be upon raising the profile of tourism and its potential in the region, and the creation of a suitable and deliverable image of tourism, that provides the greatest fit with the features of the area.

We believe that the initiatives that have been proposed above will achieve this for Melbourne Riverlands, but stress that in the early stages that the Regional Tourism Association concentrate only on those limited number of key projects, of primary significance in terms of the likely competitive advantage they should bring to the region.

While the primary projects are likely to require an injection of government funding, the Secondary initiatives that require far less reliance upon funding, should also be given priority and be undertaken in conjunction with the primary initiatives. This should provide a framework in which key projects and the development of tourism can proceed.

Notwithstanding that the major focus and funding priority should be upon the primary and secondary initiatives, in order to attain competitive advantage, the tertiary initiatives should nonetheless be pursued should the opportunities present themselves, with the view to supporting the recreation strengths of the region.

7 Implementation Plan

The following Implementation Plan recommends actions that should support the Melbourne Riverlands Regional Tourism Association, in the development of tourism for the region.

It is our view that this timeframe will provide adequate direction to both determine the viability for tourism in the region, and develop a supportive framework to ensure it can be sustained as a viable industry. In addition, it should provide sufficient guidance as to the effectiveness of the MRRTA in developing tourism and supporting proposed initiatives.

Establishment of Tourism Structures

- The establishment of the Melbourne Riverlands Regional Tourism Association, to develop a region-wide focus and support for tourism across both the local tourist associations and local government boundaries, and

- The appointment of a Regional Tourism Co-ordinator to drive the activities of the MRRTA.

Implementation actions

0-18 months

		Budget	Responsibility
•	Convene meeting with Local Tourism Associations to gain support for the establishment of the MRRTA;	1 week	Local government LTA's
•	Establish Melbourne Riverlands Regional Tourism Association	8 weeks	MRRTA
•	Appoint Regional Tourism Co-Ordinator	$50,000 (including On Costs)	Local government (allocation of funds based on tourism strength of each area)
•	Formalise the role and objectives of the MRRTA; develop business plan and goals for the Association	4 weeks	MRRTA Tourism Co-ordinator
•	Meet with MCMB to review benefits and fees associated with membership	1 week	Tourism Co-ordinator
•	Join MCMB *Associate* level of membership	$250 p.a.	MRRTA

Developing the image and raising the profile of tourism

- To educate the local community and businesses of the potential for tourism in the region, and its potential economic benefits;

- To develop a regional tourism map that promotes the existence, type of operation and location of all tourism operators and businesses across the region;

- To increase the profile of the tourism industry and its constituents, and develop opportunities for co-operative marketing through the local press and media;

- To identify locations of businesses where information collateral and service will be provided for the potential visitor, and to educate these business owners and their employees of the importance of both promoting tourism, and customer service;

- To provide a framework that supports the development and growth of the tourism industry in the region, through a co-ordinated and consistent set of tourism policies across the region.

Key issues would include addressing the planning and zoning controls and regulations in terms of development, and the issue of maintaining a balance between tourism development and protection of the natural environment and assets.

Implementation actions

0-18 months

		Budget	Responsibility
•	Conduct forums to educate non-tourism industry operators of benefits of tourism	6 months	MRRTA
•	The development and distribution of a regional tourism map, linking the tourism operators and businesses within the Product Region	$50K	MRRTA
•	Establish liaison and working relationship with Community radio and Press, to promote the positive aspects of tourism development, and the strength of the tourism assets in the region	2 weeks Possible nominal media charge	Regional Co-ordinator
•	Develop promotional material for Radio and press	Ongoing	Regional Co-ordinator
•	Identify key locations of businesses (such as Petrol stations) that will serve as an information resource for the region	4 weeks	Regional Co-ordinator
•	Conduct training forums with the owners/operators of these businesses, to educate them concerning the value of tourism, and in Customer Service and Satisfaction	Dollar cost for participants of the training forums	Outer Eastern College of TAFE/Aussie Host Regional Co-ordinator
•	Development and management of a consistent set of tourism policies across the regions	6 months and Ongoing	Regional Co-ordinator Local Government

Enhancement of linkages and trails

- The linking of Melbourne Riverlands with the State-wide signage strategy currently being undertaken by Tourism Victoria and VicRoads, for the development and funding of a multiple tier signage strategy for the State, and

- The development of Yarra river trails in conjunction with Melbourne Parks and Waterways, with the view to moving visitors to the area off the established feeder routes, to explore other areas and thereby extend their visit and expenditure.

Implementation actions

0-18 months

	Budget	Responsibility
• Commission of independent analysis of likely social, environmental, planning & commercial considerations for the development of the Arts/Environmental Trail	$20K	MRRTA
• Establish active support for the concept and project, jointly, from the local councils	4 weeks	MRRTA
• Assessment of funding or other requirements necessary to overcome identified impediments; development of approaches re funding	2 weeks	MRRTA
• Work with trail designers in the development and implementation of the Arts trail	$40K	MRRTA
• Appointment of Regional Signage Committee, to oversee the audit of themes and activities in the region, upon which to base signage themes	4 weeks	MRRTA
• Appointment of Signage Consultant, to jointly design signs with the MRRTA, based upon the audit activities (above)	$25K	MRRTA
• Implementation of signage designs for the region on a local basis	$120K	Local government

Promotion of the Art and Heritage product to the Melbourne market

- The establishment of strategic alliances with the Museum of Victoria and National Gallery to provide the opportunity to expand the awareness of, and interest in, the strength of the art and heritage assets of the region, and create the opportunity for competitive advantage;

- To provide support to the local Wurundjeri people in their endeavours to provide interpretive experiences of the traditional aboriginal heritage and culture, to the visitor. Permit approvals should be reviewed accordingly, and support provided for the completion of the Feasibility Study for the proposed Tikalara Cultural and Environmental Interpretation Centre, and similar interpretive facilities; and

- The development of the Arts/Yarra trail should be a priority to promote the arts and heritage strength of the region to the existing recreational visitors (as discussed above).

Implementation actions

0-18 months

		Budget	Responsibility
•	Undertake audit of art and heritage product across the region	8 weeks $10K	MRRTA
•	Commission independent study to assess markets and viability of art and heritage product in the region	$20K	MRRTA
•	Meet with Museum of Victoria and National Gallery to explore linkages, and determine types of interaction and displays	2 weeks	MRRTA
•	Meet with Wurundjeri concerning proposed developments	2 weeks	MRRTA Melbourne Parks and Waterways
•	Assessment of funding or other requirements necessary to develop concepts in the region	2 weeks	Regional Co-ordinator

7.1   Measurement of Achievement

We provide below a summary of key outputs to be achieved in the first twelve months of tourism development within Melbourne Riverlands. These outputs should be used to measure performance toward the achievement of the primary objectives for the Melbourne Riverlands Working Group (initially) and the Melbourne Riverlands Regional Tourism Association, in conjunction with the Regional Tourism Co-ordinator and local government.

Key outputs should include:

- To have in place an education program for both non-tourism and tourism operators regarding the benefits of tourism;

- To have completed the design stage, and be undertaking the development, of a regional tourism map;

- To establish strategic alliances with local press and media, to assist in promotion of the tourism industry;

- To have identified the locations of businesses across the region, and set up the necessary facilities, to provide information services to visitors;

- To have organised and undertaken Customer Service training with the personnel providing tourism information services to visitors to the region;

- To have developed and implemented, in association with local government, consistent tourism planning policies across the region, to support the development of tourism;

- To have completed the assessment and design stages, and commenced the development, of the Arts/Environmental trail;

- To have completed the design stage, and be undertaking the development and implementation, of the tourism signage program for the region;

- To have successfully established linkages with the Museum of Victoria and National Gallery, to enhance opportunities for cross promotion of tourism attractions; and

- To have appointed consultants to undertake, and potentially to have completed at this stage, feasibility studies to determine the viability and direction of the following proposed tourism initiatives (as recommended):

    - Tikalara Cultural and Environmental Interpretation Centre,
    - Tourist Heritage/Arts/Environment Trail, and
    - Petty's Orchard.

Should funding be available to do so, feasibility studies for proposed Secondary initiatives, outlined in Section 6.2, could also be undertaken within the first twelve months.

Upon completion of these feasibility studies, the MRRTA should make a decision concerning the future of the proposals, and where appropriate, locate private and public sector funding.