

Nillumbik Destination Management Plan

FINAL

NILLUMBIK SHIRE COUNCIL

NOVEMBER 2015

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EXECUTIVE SUMMARY

PROJECT BACKGROUND

Nillumbik Shire Council appointed Urban Enterprise to prepare a Destination Management Plan. The Destination Management Plan (DMP) provides a review of Nillumbik's visitor markets, tourism product and experience profile and tourism governance structure.

The Destination Management Plan builds on an initial discussion paper prepared in May 2015.

VISITATION TO NILLUMBİK

It is difficult to determine the number of visitors attracted to Nillumbik as the official visitor statistics from the National Visitor Survey significantly understate daytrip visitation. The reason for this is that the official statistics do not include visitors travelling less than 50 kilometres from their place of residence.

Overnight visitation is significantly constrained by a low provision of commercial accommodation and the vast majority of overnight visitors are staying with friends and relatives. Visitation data from Tourism Research Australia estimates an average of 58,788 overnight trip visitors are drawn to Nillumbik per annum (average calculated from 5 years ending September 2014).

A review of the larger attractions highlights that Nillumbik attracts high levels of domestic visitation. For example the Diamond Valley Miniature Railway attracts around 140,000 visitors annually and it is only open on Sundays (and public holidays and Wednesdays during the school holidays). Data collected from the Nillumbik visitor survey shows that a majority of visitors to the Miniature Railway are from outside of the Shire. In addition Montsalvat attracts 40,000 gate visitors, most of whom are a different market profile to the miniature railway, based on discussions with the operators of each attraction.

There also many visitors drawn to the Shire for informal recreation such as cycling, picnics and visitation to social events.

KEY MARKETS

Nillumbik visitor survey findings highlight that midlife family groups and older adult couples make up the key markets for Nillumbik. 41% of visitor survey respondents were aged 35-44 years, with the leading type of travel party being Family group, at 55%. 11% of respondents were travelling as Adult couples, of whom the majority were aged over 55 years.

From a geographic perspective many visitors to Nillumbik are traveling from Melbourne's inner north (Preston, Thornbury, Northcote and Fitzroy) and Melbourne's east (Doncaster, Blackburn).

The Nillumbik Shire product offering aligns with three of Tourism Victoria's key target Lifestyle Leaders Segments: Creative Option Leaders, Food and Wine Lifestylers and Inspired by Nature.

PRODUCT STRENGTHS

An analysis of tourism product and results from the primary visitor survey show that the key product themes for Nillumbik that offer a competitive advantage and differentiation from other regions include:

- **Sustainability and Environment.** Sustainability in Nillumbik is the critical experiential layer that the visitor is provided on their visit to the region. Environmental sustainability is a way of life, a philosophy about living amongst nature with a sustainable approach to using, reusing and maintaining local resources. This approach is present in the region's mudbrick architecture, small cottage industry, Edendale Farm, regenerated bushland reserves, community values and the goals of the Green Wedge Management Plan. This theme should consistently provide the overarching experience for the visitor to Nillumbik.
- **Authentic Arts, Heritage, and Culture.** The most well developed product in Nillumbik is the arts and cultural offer. Montsalvat is an icon that represents this multi layered experience unlike any other product. Nillumbik's arts and cultural offer differs from many other regions that only have static art galleries, with many artists hosted in throughout the Shire. Nillumbik has a 'living' arts and cultural experience.

- **Wine.** Wine is certainly an emerging sector in Nillumbik and the wine product is unique even within the Victorian context. Boutique vineyards in the hills of Nillumbik have a European rustic appearance, providing a unique experience only offered in the north east of Melbourne.
- **Nature Based Tourism.** This is a major draw card for many visitors. The region attracts hundreds of cyclists and bushwalkers every weekend and the nature based reserves provide the setting for some of the closest bushland experiences to Melbourne's CBD.
- **Family product.** The visitor profile highlights the large number of families attracted to Nillumbik Shire. The Diamond Valley Miniature Railway is a key motivator for visits on Sundays, with over 140,000 visitors per year. Families are also drawn to the region's extensive parkland and reserves for picnics, walking and recreation activities, and playgrounds such as the Eltham North Adventure Playground.

PRODUCT DEVELOPMENT OPPORTUNITIES

There is further opportunity to grow products and experiences that match market needs and also opportunity to extract greater yield and dispersal from existing visitors, many of which are undertaking single destination visits.

Below are identified product development and investment opportunities which if delivered would grow visitation, yield and dispersal in Nillumbik:

NATURE BASED TOURISM

- Formalisation of mountain biking facility at Plenty Gorge Parkland and explore demand for a mountain biking facility at Smiths Gully/Christmas Hills.
- Further develop high quality trails, trail mapping, signage and trail head amenity and facilities;
- Support investment in growing adventure and nature based opportunities in Plenty Gorge Parkland including walking trails, heritage interpretation, rock-climbing and abseiling and multi-sport adventure races;
- Further investment in Nillumbik's formal shared use trail network including Diamond Creek Trail, Aqueduct Trail, Green Wedge Trail and Kinglake Way;
- Mapping and information on Nillumbik's road cycling routes and mountain bike areas;
- Investigate demand for expanding recreational equine facilities;

- Support/lobby Melbourne Water to invest in Sugarloaf Reservoir to update infrastructure and provide targeted experiences to family groups: Adventure playgrounds, cycle trails etc; and
- Promote and develop Yarrambat Golf Course as a unique golf and wildlife experience in the Melbourne context. This would be of interest to international visitors.

ARTS, HERITAGE AND CULTURAL TOURISM

- Indigenous cultural trails: celebrating and interpreting the region's indigenous links;
- Packaging of arts product with other product: wine experience, restaurant etc;
- Build on and revisit past initiatives: Valley of the Arts marketing and the Heidelberg Artists Trail;
- Leveraging from Nillumbik's mud brick heritage such as expanding the Practically Green Festival demonstrations and displays, and establishment of a centre of mudbrick architectural excellence;
- Arts installations in Diamond Creek.

AGRIBUSINESS AND WINERIES

- Accommodation at farms and wineries. There are unique wineries in Nillumbik which could offer a quality agribusiness and winery experience within a 45 minute drive of Melbourne;
- Destination dining using local produce;
- Continuation of the Local Food Connect program to increase local produce use in Nillumbik;
- Developing 'meet the maker' experiences at wineries;
- Improvement of coffee culture/café culture to meet target market expectations;
- Farm gate experiences such as a cidery in Strathewen, olive farm gate experience in Kangaroo Ground and berry and fruit picking.

FAMILY PRODUCT

- Explore expanding the offering at Diamond Valley Miniature Railway
- Investment and expansion of Edendale Community Farm;

ACCOMMODATION

- Camping grounds in Hurstbridge and in appropriate bushland reserves;
- Farmstay accommodation; and
- Large accommodation establishment co-located with large conference and convention centre.

EVENTS

- Wedding and social events planners guide; and
- New events which support The Artisan Hills brand.

KEY ISSUES

Through consultation and review of information and the current approach to tourism in Nillumbik, the following issues have been identified:

- Lack of industry knowledge of the importance of the visitor economy including understanding the key markets for Nillumbik;
- Small scale of the tourism industry to establish a strong regional tourism association;
- Poor awareness or association of tourism with the Nillumbik brand;
- Poor digital presence of Nillumbik's tourism industry;
- Lack of strategic investment in events; and
- Broadening the focus of Nillumbik from tourism to the 'visitor economy'.

STRATEGIC DIRECTIONS

The Nillumbik Destination Management Plan aims to provide a thorough review and strategic framework for the tourism industry in Nillumbik. An overview of strategic directions are highlighted below. For more detail on specific strategic directions and actions see section 9.

- Support the development of nature based tourism such as nature walks and mountain biking by investing in reserve infrastructure including interpretation;
- Improve the cycling experience through improved awareness of the benefits of cycle tourism and mapping and information;
- Invest in digital interpretation of heritage, cultural and natural assets to improve the way visitors experience Nillumbik (for example, trail maps online);
- Continue to develop equine tourism through trail investment;
- Continue to invest in shared use trails;
- Develop festivals and events that leverage from Nillumbik's uniqueness;
- Build on the arts and cultural product through development of curated content and packaging;
- Improve the food and wine culture of Nillumbik through promotion of investment opportunities;
- Promote the need to invest in accommodation to keep visitors overnight in Nillumbik;
- Improve and develop products suited to family experiences;
- Investigate the opportunity to establish a regional tourism body to improve the resources and maturity of the region's tourism industry;
- Continue to monitor the visitor economy in Nillumbik to make informed decisions.

Priority strategies for Nillumbik include:

- Investigation of the establishment of a regional tourism body with partnerships with surrounding north east municipalities;
- Review of visitor information services;
- Implementation of a brand followed by a new digital platform.

It is critical that governance structures and dedicated resourcing for tourism is organised as a priority to ensure that other strategies and actions can be implemented.

1. INTRODUCTION

1.1. PROJECT BACKGROUND

The Nillumbik Destination Management Plan is being prepared by Urban Enterprise on behalf of Nillumbik Shire Council.

The Destination Management Plan includes the following components to provide a thorough review and strategic framework for the tourism industry in Nillumbik:

- Analysis of the current visitor and tourism profile, to assess the importance of tourism to the Nillumbik region;
- Audit and assessment of tourism product within Nillumbik and the wider region, and identification of gaps to meet market need;
- Development of a tourism vision and framework, including destination development planning, destination management, and destination marketing;
- Identification of roles and responsibilities of stakeholders to support the Tourism and Marketing Plan framework, and any capacity building required;
- Development of strategies and an action plan, including budget and measuring for monitoring success.

The Destination Management Plan is being conducted alongside two other tourism related projects including a marketing and branding project. This Destination Management Plan focuses on developing an understanding of visitor markets, product and investment opportunities to grow tourism.

1.2. THE REGION

LOCATION

Nillumbik is known as the Green Wedge Shire, located in partial bushland areas north east of Melbourne. Nillumbik is bounded by the City of Banyule to the south, City of Whittlesea to the west, City of Manningham and Yarra Ranges Shire to the east and Murrindindi Shire to the north.

The visitor does not distinguish the Local Government boundaries of Nillumbik Shire and it is important to develop experiences targeted to visitor journeys, product and touring links from the broader region.

Figure 1 provides an outline of Nillumbik and its key destinations.

ACCESS

Nillumbik has good accessibility to the Tullamarine Airport and Melbourne's CBD when compared with competing nature based, arts and wine destinations. Traveling by car, it is approximately 26 minutes from Tullamarine Airport to Diamond Creek and approximately 37 minutes from the CBD to Eltham.

Public transport access to the Nillumbik Shire can be made using the Hurstbridge railway line, travelling from Flinders Street Station, with 23 stations. The Hurstbridge railway line connects Melbourne's CBD and Nillumbik Shire. The service takes 1 hr 20 minutes stopping all stations from Flinders Street to Hurstbridge.

The primary visitor survey undertaken by Urban Enterprise highlights the importance of touring through the Shire northwards to Kinglake and eastwards to the Yarra Valley.

FIGURE 1 NILLUMBIK SHIRE AND DESTINATIONS



1.3. WHAT IS A DESTINATION MANAGEMENT PLAN?

A Destination Management Plan is a holistic review and strategy for the tourism industry acknowledging that the role of developing tourism is shared by numerous stakeholders including State and Local Government, Tourism Associations, Tourism Operators and the community.

The Destination Management Plan for Nillumbik draws on best practice as per ARTN Destination Management Guidelines, and includes consideration of:

VISITOR MARKETS

- Who's visiting now?
- Who will be visiting?
- Who should we target to visit?
- What do the target visitors want/need?
- How do you reach your target market?

PRODUCT/INFRASTRUCTURE/EXPERIENCES/INVESTMENT

- What is the existing product?
- What are the gaps matched to market need?
- What are the priorities for investment?

ORGANISATION/GOVERNANCE

- Who is responsible for delivering tourism?
- Is the current governance structure working?

1.4. APPROACH

The key elements of this study include:

- Assessment of visitor markets using primary and secondary data sources including National Visitor Survey data and a local visitor survey;
- Audit and gap analysis of tourism products to determine product strengths;
- Consultation with industry and Council stakeholders;
- Review of approach to digital marketing and online presence;
- Preparation of discussion paper;
- Identification of projects;
- Preparation of a Destination Management Plan.

See Appendices section for detail on the project methodology and list of consultations.

1.4.1. GREEN WEDGE MANAGEMENT PLAN

Urban Enterprise has aimed to align the Nillumbik Destination Management Plan with the vision of the Nillumbik Green Wedge Management Plan:

NILLUMBIK GREEN WEDGE MANAGEMENT PLAN - VISION

In 2030, management of the Nillumbik Green Wedge will lead the way in economic, environmental and social sustainability.

The Green Wedge will be secure and will be valued by the local and wider Melbourne community for its natural and cultural values.

The future of the Nillumbik Green Wedge is one in which:

- *natural and cultural values are conserved and enhanced;*
- *bush and rural landscapes are conserved and enhanced;*
- *the economic future is sound;*
- *communities are strong, connected and supported and are knowledgeable about the Nillumbik Green Wedge;*
- *local identity and diversity is respected and nurtured.*

The Nillumbik Green Wedge Management Plan supports the development of tourism in the Shire provided it is well planned and complements the environmental values and the area's cultural heritage. The Plan acknowledges a perceived lack of supporting tourism infrastructure within the Shire, such as cafes, restaurants, craft shops and conference facilities, and also presents opportunities for supporting businesses for Nillumbik Green Wedge tourism enterprises, such as wine making.

1.4.2. VISITOR ECONOMY FOCUS

The Destination Management Plan for Nillumbik focuses on visitor segments much broader than tourism visitors and considers visiting friends and relatives markets, event visitors and recreation markets.

An analysis of data shows that most visitors are visiting for reasons other than holiday or leisure purposes, Nillumbik none the less attracts a significant number of visitors who support the local economy.

2. LITERATURE REVIEW

2.1. INTRODUCTION

This section provides a review of relevant Federal, State, and Local Government strategies and policies to inform the Nillumbik Tourism Destination Management Plan. The review will inform the product, issues and opportunities present for the industry.

2.2. KEY FINDINGS

Federal and State policy from the past decade has a strong focus on the development of nature-based, recreation and heritage tourism product and experiences. Food and wine is increasingly recognised as a key tourism driver and Tourism Australia recently launched a new campaign 'Restaurant Australia' to showcase Australia's food and wine offering. Nillumbik may be well placed to leverage visitation from the increasing popularity of wine, as well as its complimentary nature-based and heritage assets. Further improvement of the food offer would be required to meet the growing demand for quality contemporary food experiences.

Although Nillumbik may not be a widely recognised tourism destination, there is significant local policy support for further tourism development in the region. Key tourism product and experiences of Nillumbik include nature-based tourism, heritage tourism and the arts.

Key opportunities for product development include investment in trails (as outlined in the Trail Strategy), develop the food and wine industry, leverage from the local arts and creative community, feasibility study into a regional art gallery, development heritage assets (e.g. Heidelberg School Artists Trail) and detailed investigation into tourism opportunities within the Green Wedge Zone.

There are existing local and regional tourism industry bodies which are active in the region. The strategy will need to incorporate strategic initiatives which are already identified and provide a clear and organisational structure for how actions will be implemented.

2.3. FEDERAL GOVERNMENT

There is strong support from the Australian Government to promote growth within the tourism sector. The National Long Term Tourism Strategy sets out a framework which provides support for tourism product and tourism related development. The Government's 2009 National Long Term Tourism Strategy identifies that in order for Australia to remain competitive in the Global tourism market; continued investment is required to deliver quality sustainable tourism product and services that provide visitors with compelling tourist experiences.

The Australian Government supports tourism through the Department of Resources, Energy and Tourism and Tourism Australia. Key Federal Government tourism strategies and research include:

- The Jackson Report on behalf of the Steering Committee: Informing the National Long-Term Tourism Strategy (2009);
- National Long-Term Tourism Strategy, and the Work Plan (2009);
- 2020 Tourism Industry Potential (2010, updated in 2011);
- Tourism Research Australia: State of the Industry, Travel By Australians and International Visitors in Australia (Sept. Qtr 2011);
- Tourism Forecasting Committee: Issue 2, 2011

The Jackson Report, the National Long-Term Tourism Strategy and 2020 Tourism Industry Potential note the link between investment in tourism product and infrastructure and the industry meeting its potential for growth over the forthcoming decade.

2020 Tourism Industry Potential specifically refers to the need for investment in quality product in regional areas, rather than increased quantity. This strategy also refers to Governments to reduce red-tape and to facilitate investment in the industry. The *National Long-Term Tourism Strategy* highlights the importance of the natural, cultural and heritage assets of the country to the tourism industry.

In May 2014, Tourism Australia launched a new international marketing campaign called 'Restaurant Australia' to promote Australia's culinary experiences internationally. The campaign has been launched in response to research which shows that demand for food and wine experiences are continually growing as part of individuals travel choices. This is an important market for Nillumbik.

2.4. STATE GOVERNMENT

Tourism Victoria has several strategies relevant to the development of tourism in Nillumbik including:

- Victoria's Nature Based Tourism Strategy 2008-2012;
- Victoria's 10 Year Tourism and Events Strategy;
- Concept Proposals for Tourism in Victoria (2005);
- Tourism Victoria Investment Guidelines (2008);
- Victoria's Tourism Plan Summary: Food and Wine 2004-2007; and
- Victoria's Cycle Tourism Action Plan 2011-2015.

2.4.1. TOURISM VICTORIA

Tourism Victoria is the primary body responsible for governing tourism policy direction and development in Victoria. Tourism Victoria is committed to securing Victoria's long term tourism future and supporting the delivery of quality infrastructure across Regional Victoria.

Tourism policy is important in providing strategic guidance on the direction of nature based tourism policy and development. Tourism Victoria drives policy and strategy for the tourism industry at a regional level; providing direction for ten tourism regions across the State.

VICTORIA CYCLE TOURISM ACTION PLAN 2011-2015

The Cycle Tourism Action Plan is designed to outline Victoria's current position in relation to cycle tourism, provide an overview of current visitation and segmentation and propose a number of directions and actions. The Nillumbik Shire region is identified as having primary strengths in 'Trails' and 'Major Cycling Events', and secondary strengths in 'Road Cycling', and 'Mountain Biking'. The plan supports the completion of rail trails and further cycling tourism infrastructure to ensure there is an adequate supply of cycle tourism products.

INVESTMENT GUIDELINES FOR WINE TOURISM

The Investment Guidelines for Wine Tourism was developed to provide advice and guidance on wine tourism experience development for both the public and private sector. Wine is a significant driver of tourist demand, with wine tourism no longer limited to older demographic profiles. The market for regional wine and food experiences are made up of segments with high disposable incomes, with younger markets (25-34 year olds) being a key growth segment. Strong return visitation indicates that loyalty is high suggesting high yield and strong word of mouth promotion.

Research undertaken by Tourism Victoria has shown that wine quality is not the only consideration of visitors when deciding on which region to visit. Other considerations include reputation, food, ambience, customer service and past experience.

The following table summarises examples of relationships between the needs of customers, potential wine associated activity which may satisfy those needs, and some possible markets or new enterprise.

TABLE 1 CUSTOMER NEEDS, ACTIVITY & MARKETS

Customer Need	Business Activity	Associated Markets
Buying	Cellar Door Gourmet Produce Merchandise Gallery	Day trip and overnight
Learning	Tasting Wine Education Winery Tours Museum	Education, tour groups
Accommodation	B&B Hotel/Motel	Weddings, romance, festivals
Business	Conference	Seminar, convention, retreat
Eating	Café Restaurant BBQ/Picnic	Day trip, romance
Functions	Reception facilities	Weddings, celebrations

Source: Investment Guidelines for Wine Tourism

2.4.2. LOCAL AND REGIONAL STRATEGIES

Urban Enterprise has completed a comprehensive review of local reports and strategies relevant to tourism in the Nillumbik Shire, to inform the product, issues and opportunities present for the industry. The following were included in this review:

- Nillumbik Shire Council Plan 2013 - 2017;
- Nillumbik Tourism Association Strategic Plan 2012;
- Nillumbik Shire Economic Development Strategy 2011 - 2016;
- Nillumbik Shire Cultural Plan 2011 - 2017;
- Valley of the Arts Business and Marketing Plan 2011 - 2015;

- Heidelberg School Artists Trail Review 2012;
- Nillumbik Shire Green Wedge Management Plan 2010;
- Nillumbik Shire Trails Strategy 2011;
- Nillumbik Shire Recreation Strategy 2011 - 2018;
- Edendale Master Plan 2008;
- Eltham Lower Park Master Plan 2009

NILLUMBIK SHIRE COUNCIL PLAN 2013 - 2017

The Nillumbik Shire Council Plan 2013 - 2017 is the key strategic document to guide the organisation's work to manage and deliver services and facilities for the Nillumbik community. Strategies are identified under the themes of Community, Environment, and Built Environment, Economy and Council Services. Key strategies which are considered relevant to tourism include:

Strategies for the Community include:

- *We will provide **recreation and sports facilities** and services to enhance social participation and to help our community be **active and healthy**;*
- *We will **engage the community in enhancing local neighbourhoods** to make them welcoming and vibrant places.*

Strategies for the Built Environment include:

- *We will plan so that any development is sympathetic to the Shire's **unique heritage and protects neighbourhood character and our tree canopy**;*
- We will provide a safe and accessible network of **local roads, footpaths and trails**;
- *We will strive for a **clean, well-maintained Shire** that enhances a sense of community pride and safety;*

Strategies for the Economy include:

- *We will plan for economic development that is consistent with the Nillumbik Planning Scheme and supports Councils objectives;*

- We will partner with local businesses and groups to **promote Nillumbik as a unique destination for nature, recreation, culture, food and wine;**
- *We will encourage business investment that enhances and benefits our activity centres and townships;*
- *We will maintain regional partnerships that enhance opportunities for our local businesses.*

The key strategy relevant to this study is the promotion of Nillumbik as a unique destination. Other key documents are quoted in support of strategy such as the Economic Development Strategy and are reviewed in detail within this section.

The Council Plan also highlights that Nillumbik has relatively high socio-economic levels. This provides a strong local market for tourism businesses such as cafes and restaurants.

NILLUMBIK GREEN WEDGE MANAGEMENT PLAN 2010

The Green Wedge Zone covers 90% of land area in Nillumbik Shire. It is critical to the preservation of agricultural and environmental values, the use and development of land for tourism purposes, and central to the identity of Nillumbik Shire. As such the Green Wedge Management Plan 2010 (GWMP) is a key policy document which influences the majority of Council strategies and plans.

Strategies and objectives are framed within four themes; Environment, Economy, People and Communities, and Governance. Tourism is considered within the Economy section, with existing tourism activity in the Green Wedge described as being touring, food, wine, art, heritage, romantic getaways and gourmet weekends. Key opportunities for development of tourism product in the Green Wedge are identified as:

- Walking and nature conservation activities;
- Cultural heritage trails;
- Health and wellness experiences; and
- Opportunities to purchase local produce, arts, and crafts.

The realisation of the trail network is identified as a priority.

Overall the GWMP provides some support for tourism activities in the Green Wedge; however, they must complement the areas environmental values and cultural heritage.

Tourism use in sensitive environmental areas will be discouraged. The key strategies relevant to tourism include:

- Achieve economic development in townships of St Andrews, Hurstbridge and Panton Hill and in the Green Wedge, in keeping with township structure plans;
- Support only low impact sustainable tourism in the Green Wedge;
- Provide information about what types of tourism business can be established in the Green Wedge and where;
- Provide for land uses that encourage expanded, compatible, tourism activity in the Green Wedge and its townships in keeping with township structure plans.

A tourism land use framework is to be completed as a priority action to clearly define the types of opportunities that are acceptable in the Green Wedge, and locations of where tourism will be encouraged and discouraged. This is a priority action which is to be completed within 1-5 years. Other relevant actions include:

- 5.1** Assess the current level of tourism-related accommodation provision in the Green Wedge-number of beds, location etc. If a shortfall is indicated e.g. camping, youth hostel. Pursue opportunities to increase appropriate tourism-related accommodation in identified Green Wedge locations.
- 5.2** Explore models for ‘ecotourism’ or back-to-nature tourism, including Italy for its agritourism.

Both of these are medium term actions (Years 5-10).

NILLUMBIK SHIRE ECONOMIC DEVELOPMENT STRATEGY 2011 - 2016

The Nillumbik Shire Economic Development Strategy 2011 - 2016 identified five themes towards achieving a ‘Vibrant Local Economy’ in the Shire:

1. Activity Centres (including the Major Activity Centres of Eltham and Diamond Creek, and Neighbourhood and Local Convenience Centres including Hurstbridge, Research, Bolton Street, and Apollo Parkways);
2. Business Development;
3. Tourism;
4. Arts; and

5. Rural / Green Wedge Economy.

In regards to tourism, the Strategy acknowledged key issues for tourism in the Shire to be a low supply of accommodation product (only 17 providers across the municipality), low visitor spend (compared to the rest of Victoria), and limitation in the existing planning Scheme for developing tourism product in the green wedge.

For improving the tourism economy, the strategy outlined a need to 'develop attractions and improve visitor infrastructure, cross promotion and networks'. Nature-based tourism, culture, and food and wine tourism were listed as the Shire's tourism strengths and priorities for development. Actions identified for tourism development in the Strategy are as follows:

- Assist with the development of **new tourism products** such as **high quality eco accommodation** that is integrated with other tourism related offers;
- Advocate for **appropriate sustainable accommodation in the green wedge** to be allowed by the planning scheme;
- Develop **Meet the Maker tours**;
- Explore **funding opportunities** that are available to develop the tourism, arts, and agribusiness offer on a local and regional basis, including **potential marketing alliances with adjoining municipalities**;
- Consider marketing the high quality nature, culture, food and wine brand to the **northern metropolitan growth areas** as a new market;
- Promote the concept and achievement of **trails** and associated service nodes throughout the municipality;
- Improve coordination of **weekend opening hours** to ensure that visitors are well served (particularly in Hurstbridge and when events such as markets are being held);
- Investigate the potential for expanded development of **training** in hospitality and associated industries;
- Continue to fund **NTA** and regional tourism promotion efforts;
- Assist the NTA to develop a **sustainable tourism strategic plan**;
- **Expand tourism opportunities compatible with the Green Wedge**, in Green Wedge townships and in identified Green Wedge locations.

The Arts theme focuses on capitalising on the creative heritage of the Shire and positioning the area as a centre for the arts. The Strategy identified an action (listed above) to undertake a study to assess the feasibility of establishing a regional art gallery in the municipality, including potential opportunities to support the role of Monsalvat.

The Rural / Green Wedge Economy theme aims to create opportunities for sustainable agriculture and improved bushland management, as well as supporting "smart green" industries generally. The Strategy supports the delivery of a sustainable tourism strategy for the Green Wedge (E.3), and aims to provide certainty with regard to what types of tourism business can be established in the Green Wedge and where (E.4).

Broadly, the challenges for economic development in the municipality include the recovery from and reducing the risk of damage from bushfires; high levels of commuting creating an economic leakage for the municipality, a rapidly aging population, and rural lands' capacity to increase economic output in the areas of tourism and agriculture.

In addition to the Major Activity Centres of Eltham and Diamond Creek, the strategy identified Hurstbridge as having potential for a strong tourism function, as well as a range of local centres such as Christmas Hills, Kangaroo Ground, Panton Hill, Smiths Gully, St Andrews, Wattle Glen, and Yarrambat.

NILLUMBIK SHIRE CULTURAL PLAN 2011 - 2017

The Nillumbik Shire cultural plan, Growing our Arts and Culture: a cultural plan for Nillumbik Shire 2011 - 2017, identified five themes towards achieving the growth objectives of the plan:

1. Connected Communities, acknowledging and celebrating diversity by suggesting new partnerships and cultural development grants for new cultural programs;
2. Creating Spaces and Places, acknowledging that there are limited venues in Nillumbik for community cultural events and festivals, markets, exhibitions and performances;
3. Creative Economy, acknowledging the need for more venues for the sale of art and for festivals, as well as for affordable studio space and cultural development grants;
4. Communication and Leadership, suggesting increased community consultation in the development of cultural programs as well as a Council art acquisition policy and dedicated venue for public exhibitions;
5. Creative Communities, acknowledging a need for a central artist's registry or hub for the sharing and dissemination of information.

Actions identified in the cultural plan add to the tourism product offering of Nillumbik, such as yearly festivals and events, and the creation of new public art spaces. The investment in new cultural festivals and events, and galleries and exhibitions, will strengthen the destination branding of Nillumbik.

The plan recognised a Culture and Arts Advisory Committee as the steering committee for the development, implementation and review of the plan. There are opportunities for partnerships with tourism operators and stakeholders to facilitate benefits for both the arts and the local tourism sector.

NILLUMBIK SHIRE TRAILS STRATEGY 2011

Nillumbik Shire has an extensive network of recreational trails including 25km of urban trails and 18km of rural trails. This Strategy guides planning and decision making in the provision of recreation trails and outlines major investments for expansion of the trail network over the next 10 years.

The trails strategy recommends an investment of \$8 million in recreation trails over the next 10 years and would require significant state and federal government funding to be delivered. The major investments include:

- **Diamond Creek Trail** - extend this trail from Diamond Creek to Hurstbridge, estimated at \$3.5 million.
- **Aqueduct Trail** - determine development options for this trail following the establishment of land owner status, from Eltham to Christmas Hills, estimated at \$2.3 million.
- **Green Wedge Trail** - formalise this trail which extends from Wattle Glen to Kinglake, estimated at \$0.8 million.
- **Kinglake Way** - establish a trail from Hurstbridge to Arthurs Creek, estimated at \$0.5 million.

An action plan and timeline for completion of different segments of these trails is provided over a 10 year timeframe.

NILLUMBIK SHIRE RECREATION STRATEGY 2011-2018

This Strategy guides decision-making with respect to the provision of recreation services and facilities. The major focus of the strategy is in lifting recreation participation rates in the community and meeting the recreational needs of local residents, and only a minor relevance

to tourism. However, recreation assets and facilities can raise visitation to the local area for organised sporting activities and use of recreational trails. Therefore, the upgrade and development of new recreational assets can add to the visitor economy.

The key recreational facilities are listed as:

- Eltham Leisure Centre
- Diamond Valley Sport and Fitness Centre
- Diamond Creek Stadium
- Diamond Creek Community Centre
- Diamond Creek Outdoor Pool
- Yarrambat Golf Course

Key directions include updating existing masterplans and developing new masterplans for major leisure facilities, and supporting the 2011 Recreation Trails Strategy.

NILLUMBIK TOURISM ASSOCIATION STRATEGIC PLAN 2012

The Nillumbik Tourism Association is the peak industry organisation which provides industry advocacy, development and destination marketing. The three year strategic plan sets out priorities and strategies to guide the organisations activities. The plan is structured by the four key goals:

- **Industry Advocacy.** Provide industry representation on the matters that impact visitor experience, influence tourism infrastructure development, and raise awareness on the value that visitors bring to Nillumbik
- **Destination Marketing.** Progress branding, developing a marketing plan, collaborate marketing activities with regional bodies, raise awareness of product investment opportunities, and encourage residents to become community ambassadors;
- **Industry Development.** Build an informed and connected industry, build the capacity of the local tourism industry, raise customer service standards, and support local products.
- **Industry Association.** Build a strong and creative industry association which is properly resourced to implement the strategic plan.

The plan demonstrates that there is an existing industry body which is committed to tourism development.

VALLEY OF THE ARTS - BUSINESS AND MARKETING PLAN 2011 - 2015

The Melbourne Valley of the Arts Regional Tourism Board covers a large region in Melbourne's north east including the municipalities of Banyule, Manningham and Maroondah, and Nillumbik. The group was formed in 2011 and the region is still developing its market presence and recognition as a tourism destination.

The region's unique offering is summarised as:

- Unique arts history precincts of national significance;
- Heidelberg School Artists trail;
- Middle Yarra river environment and parklands; and
- An outstanding restaurant and café industry.

The key positioning message is *"A day amongst, art, culture, environment and cuisine"*. The key target market is 'cultural tourists', who are characterised as more likely to attend galleries, museums, events and immersive cultural experiences.

Overall the aim of the Business and Marketing Plan includes:

- Recognise the growing importance of tourism;
- Protect its nature-based and cultural assets on which this region's tourism depends;
- Coordinate the interest and efforts of stakeholders; and
- Provide a balanced enjoyable and equitable use of the region by visitors and residents.

HEIDELBERG SCHOOL ARTISTS TRAIL REVIEW 2012

The Heidelberg School was an Australian art movement in late 19th century. The Heidelberg School Artists Trail (HSAT) is 40km trail extending through Melbourne's north east, encompassing 6 municipalities. The HSAT points of interest in Nillumbik include:

- 5 signs in Eltham centre (along Diamond Creek);

- 4 signs in Research Park; and
- 2 signs in Diamond Creek.

There is a strong connection between the creative and artistic local community in Nillumbik and the HSAT. The Trail Review recommends packaging the Nillumbik section of the trail with Warrandyte section as a 2-3 hour car touring route.

The key recommendations of the review include:

- Working closely and possibly amalgamating with the Melbourne Valley of the Arts;
- Representative Council's commit to marketing and website material;
- Package the trail in three distinct sections including the Eltham, Research, Diamond Creek & Warrandyte section as the second wave impressionists.

3. VISITOR MARKET ANALYSIS [SECONDARY RESEARCH]

3.1. INTRODUCTION

This section provides an assessment of visitation trends and visitor profiles for the Nillumbik Shire destination. It draws on data collected from Tourism Research Australia's National Visitor Survey (NVS) to provide trip details and demographic data for domestic daytrip and overnight visitors to the region, to provide a snapshot of visitor market trends and preferences across the region. It enables analysis of the visitor market profile that will frame the identification of target market segments and tourism product/infrastructure opportunities. International Visitor Survey data is not reviewed as it only includes overnight international visitors, which as a market is too small in Nillumbik to review.

NATIONAL VISITOR SURVEY DATA COLLECTION

Tourism Research Australia is responsible for conducting the National Visitor Survey. 120,000 Australian residents are interviewed annually about their travel for the NVS, capturing interstate and intrastate visitation.

NOTES ON ANALYSIS

- Tourism Research Australia provides the following definitions for visitors:

Domestic day trip visitors: *Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.*¹

Domestic overnight visitors: *People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors.*¹

- NVS overnight visitation data is using data for a five year period ending September 2014, to ensure statistically relevant sample sizes and to allow for anomalous results within the annual survey.

- The analysis of domestic visitors to the Nillumbik Shire is benchmarked against the visitor profiles to the Yarra Valley and Daylesford & Macedon Ranges destinations.

3.2. KEY FINDINGS

The Nillumbik attracts an annual average of 184,314 day trips, and an annual average of 58,788 overnight trips (annual average of 5 years to September 2014, National Visitor Survey data). This data underrepresents the true level of daytrip visitation as it includes only visitors who have travelled more than 50 kilometres and have stayed a minimum of four hours. The key visitor market for Nillumbik Shire as identified by the visitor survey in section 4 is the inner north and east of Melbourne and therefore are not included in daytrip visitation data.

Overnight visitation is low as a result of limited accommodation options in the Shire.

The vast majority of overnight visitors to Nillumbik are visiting friends and relatives (66%) with only 18% of overnight visitors to Nillumbik visiting for Holiday purposes.

The National Visitor Survey shows that overnight visitors are predominantly classified as adult couples, persons travelling alone and family groups.

3.3. DOMESTIC OVERNIGHT TRIPS

3.3.1. TRIP PURPOSE

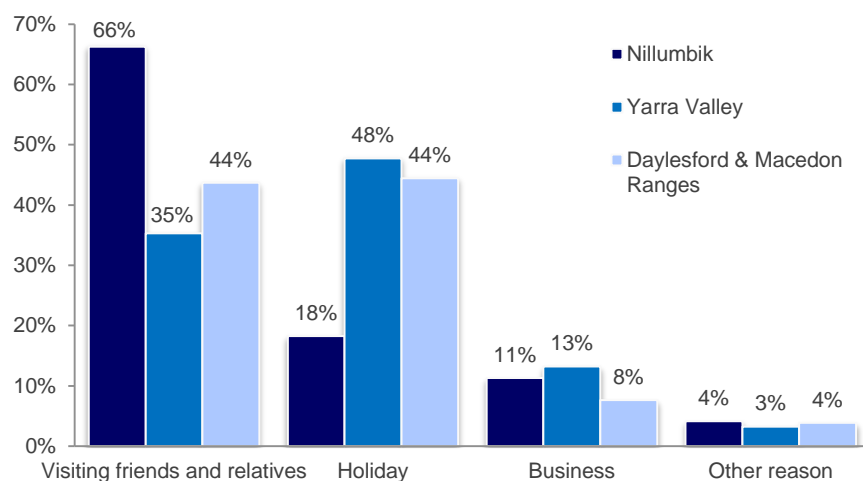
By purpose of trip, domestic overnight trips to the Nillumbik Shire are by majority for Visiting friends and relatives, 66%, with only 18% for Holiday.

Other regional Victorian destinations such as the Yarra Valley and Daylesford & Macedon Ranges are more evenly balanced in domestic overnight trips for Holiday purposes (48% and 44%, respectively) and for Visiting friends and relatives (35% and 44%).

Trip purpose highlights that Nillumbik is not a traditional holiday/leisure destination and that a greater focus needs to be made on Nillumbik's visitor economy which includes VFR, business and sports and recreation visitors.

¹ TOURISM RESEARCH AUSTRALIA, GLOSSARY OF RESEARCH TERMS

FIGURE 2 OVERNIGHT – PURPOSE OF TRIP



Source: Tourism Research Australia, NVS, 5 years to September 2014

3.3.2. VISITOR ORIGIN

The majority of visitors on domestic overnight trips to the Nillumbik Shire are from Victoria (62%), however the area receives a lower proportion of overnight visitors from Victoria than competing regional Victorian destinations Daylesford & Macedon Ranges or the Yarra Valley (82% and 77%, respectively).

This may indicate that the Victorian market may be visiting the area on daytrips but not extending the trip to an overnight stay where they would in competing regional destinations. Furthermore the strong VFR market is likely to be driving the high proportion of interstate visitation.

TABLE 2 OVERNIGHT TRIPS – STATE OF VISITOR ORIGIN

Origin	Nillumbik	Daylesford & Macedon Ranges	Yarra Valley
NSW	23%	8%	11%
Vic	62%	82%	77%
Qld	4%	4%	5%
SA	2%	3%	3%
WA	2%	1%	2%
Tas	3%	1%	1%
NT	1%	0%	1%
ACT	2%	1%	0%

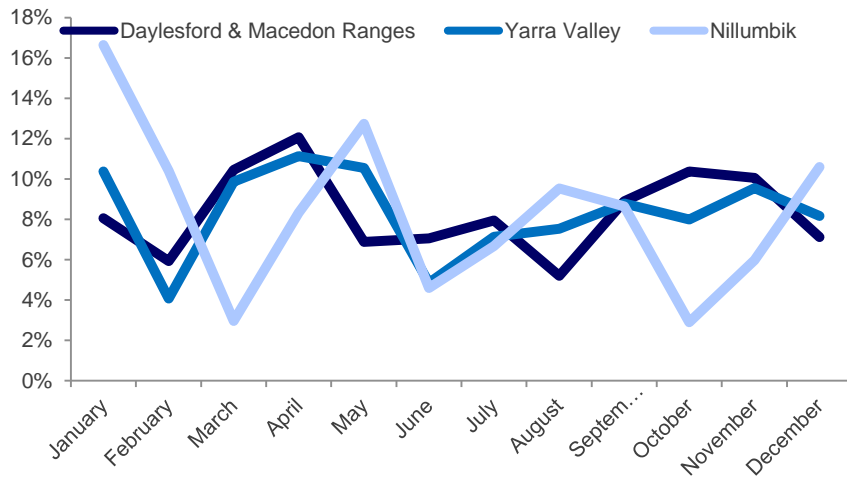
Source: Tourism Research Australia, NVS, 5 years to September 2014

3.3.3. SEASONALITY – OVERNIGHT TRIPS

Domestic overnight visitation to the Nillumbik Shire is higher during the summer months of December and January, consistent with school holidays. This reflects the strong VFR market to the Nillumbik Shire.

The seasonality of domestic overnight visitation to the Nillumbik Shire does not mirror the trend of regional destinations such as the Yarra Valley and Daylesford & Macedon Ranges, which each have a strong Easter holiday market in the months of March and April.

FIGURE 3 OVERNIGHT VISITATION SEASONALITY



Source: Tourism Research Australia, NVS, 5 years to September 2014

3.3.4. VISITOR ACTIVITIES

Analysis of domestic overnight visitor activities undertaken in the Nillumbik Shire highlights the nature based and creative product offerings of the area, as well as highlighting opportunities for further product development in these categories.

Visitors to the Nillumbik Shire are more likely than total Regional Victoria visitors to visit national/state parks (13.7% compared to 11.3%), however are less likely to go Sightseeing, Bushwalking, or have or go to Picnics/BBQs.

Other popular activities include visiting wineries, concerts and performing arts, and health spa or well-being centres, however domestic overnight visitors to the area are less likely to dine at a restaurant/café, go to markets, or visit heritage sites or museums/galleries than Regional Victoria visitors.

Analysis of visitor activities in the Nillumbik Shire suggests a visitor market interested in nature, food and wine, and culture and the arts. However the Shire struggles to compete with other Regional Victorian destinations in these visitor activities, with a lack of tourism product and/or awareness.

It is also notable that visitors to the Nillumbik Shire are less active in the outdoors, with the proportion of visitors undertaking activities such as bushwalking, golf and cycling far lower compared to total Regional Victoria.

TABLE 3 OVERNIGHT VISITOR ACTIVITIES

Activities Undertaken	Yarra Valley	Daylesford/ Macedon Ranges	Nilumbik	Total Regional Victoria
Visit friends & relatives	40.8%	52.6%	78.8%	44.9%
Eat out / dine at a restaurant and/or cafe	51.9%	50.2%	35.9%	51.6%
Go shopping for pleasure	19.8%	25.9%	21.2%	21.8%
Sightseeing/looking around	28.0%	29.9%	19.0%	28.8%
Visit national parks / state parks	13.6%	8.8%	13.7%	11.3%
Bushwalking / rainforest walks	19.4%	16.0%	7.6%	13.3%
Pubs, clubs, discos etc	10.8%	13.4%	7.0%	19.1%
Picnics or BBQs	4.2%	7.2%	6.1%	7.9%
Visit wineries	23.1%	3.6%	5.4%	4.2%
Visit botanical or other public gardens	2.8%	5.6%	4.5%	3.1%
Visit amusements / theme parks	0.5%	0.4%	4.4%	1.0%
Go to markets	8.5%	13.8%	3.8%	8.0%
Go on a daytrip to another place	4.9%	5.9%	3.5%	5.7%
Attend theatre, concerts or other performing arts	1.0%	1.1%	3.2%	1.5%
Visit a health spa / sanctuary / well-being	1.7%	5.9%	2.7%	0.7%
Visit history / heritage buildings, sites or	3.0%	5.3%	2.5%	4.7%
Attend an organised sporting event	2.6%	2.1%	2.4%	2.6%
Visit farms	1.6%	3.0%	2.4%	2.2%
Visit museums or art galleries	6.7%	9.1%	2.1%	5.2%
Visit wildlife parks / zoos / aquariums	6.8%	1.1%	1.9%	1.4%
Tourist trains	2.0%	0.4%	1.6%	0.5%
Golf	2.3%	1.5%	1.6%	3.1%
Attend movies/cinema	1.5%	1.7%	1.5%	1.4%
Cycling	2.5%	1.6%	1.3%	2.8%
Visit industrial tourist attractions (eg breweries)	3.1%	1.8%	1.2%	1.8%

Source: Tourism Research Australia, NVS, 5 years to September 2014

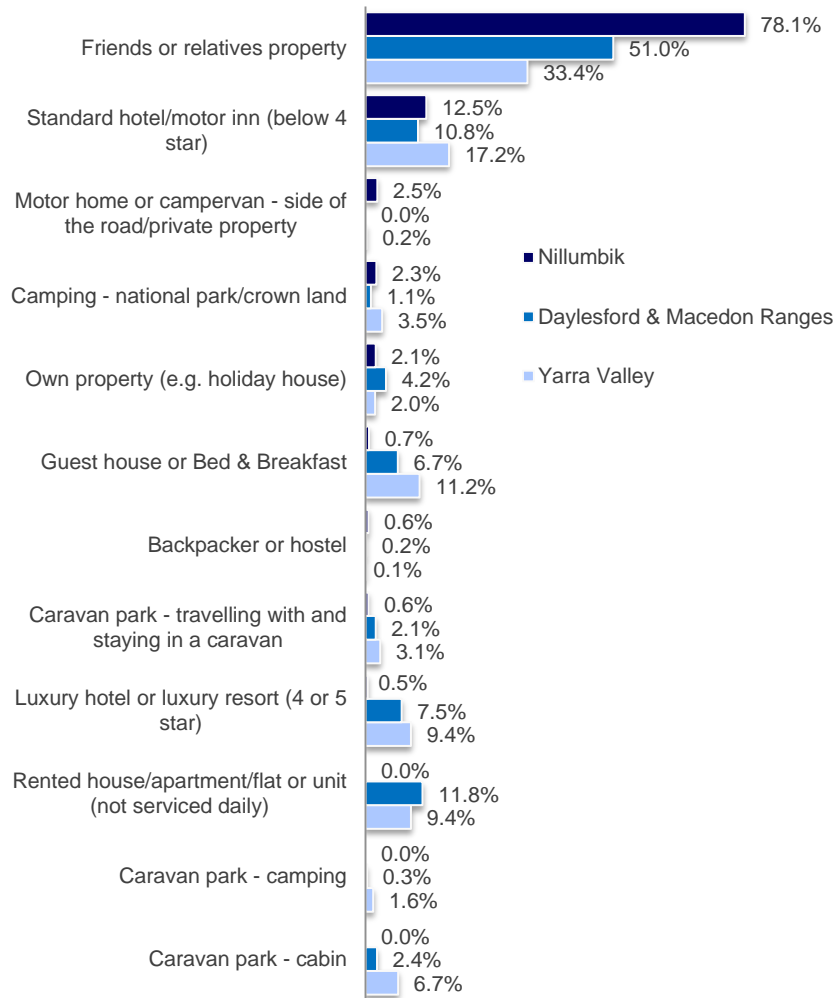
3.3.5. ACCOMMODATION

Visitors on domestic overnight trips to the Nilumbik Shire predominately stay at a Friends or relatives property (78.1%). The second most popular form of accommodation is Standard hotel/motor inn (below 4 star), at 12.5%, with all other forms of accommodation recording minimal percentages of overnight domestic visitors.

Competing destinations in regional Victoria such as the Yarra Ranges and Daylesford /Macedon Ranges have a higher proportion of visitors staying in Rental house/apartment accommodation, guest house or bed and breakfast accommodation, or luxury hotel/resort (4 or 5 star) accommodation.

The Nilumbik Shire has only 2.3% of overnight domestic visitors staying in Camping accommodation, less than 1% staying in motorhome, caravan or cabin accommodation, and less than 1% in backpacker/hostel accommodation.

FIGURE 4 OVERNIGHT - ACCOMMODATION

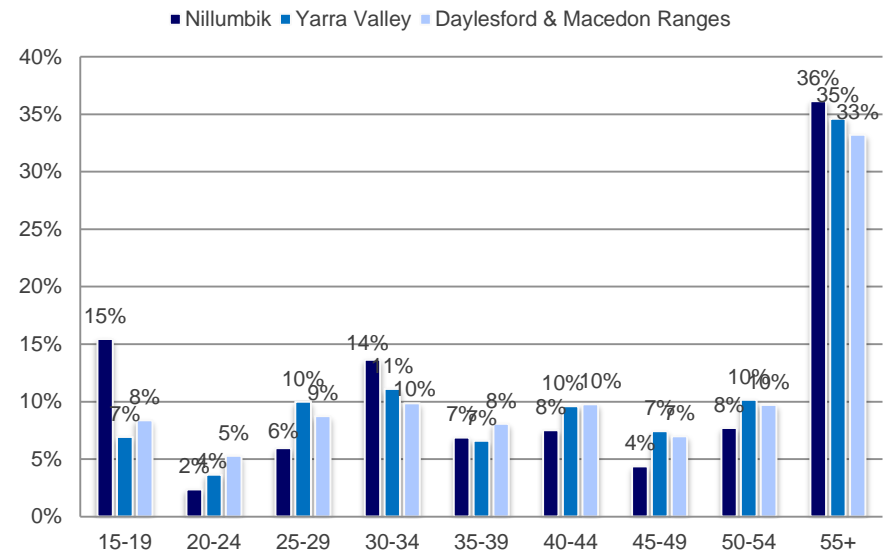


Source: Tourism Research Australia, NVS, 5 years to September 2014

3.3.6. OVERNIGHT VISITOR AGE

Compared to the visitor market in other regional destinations such as Yarra Valley and Daylesford & Macedon Ranges, the Nillumbik Shire has a slightly higher proportion of school age children and adults over 55 years, and less visitors in the 20 to 30 years age groups. The visitor market of the Nillumbik Shire is made up of less young adults compared to these competing regional destinations.

FIGURE 5 OVERNIGHT-VISITOR AGE



Source: Tourism Research Australia, NVS, 5 years to September 2014

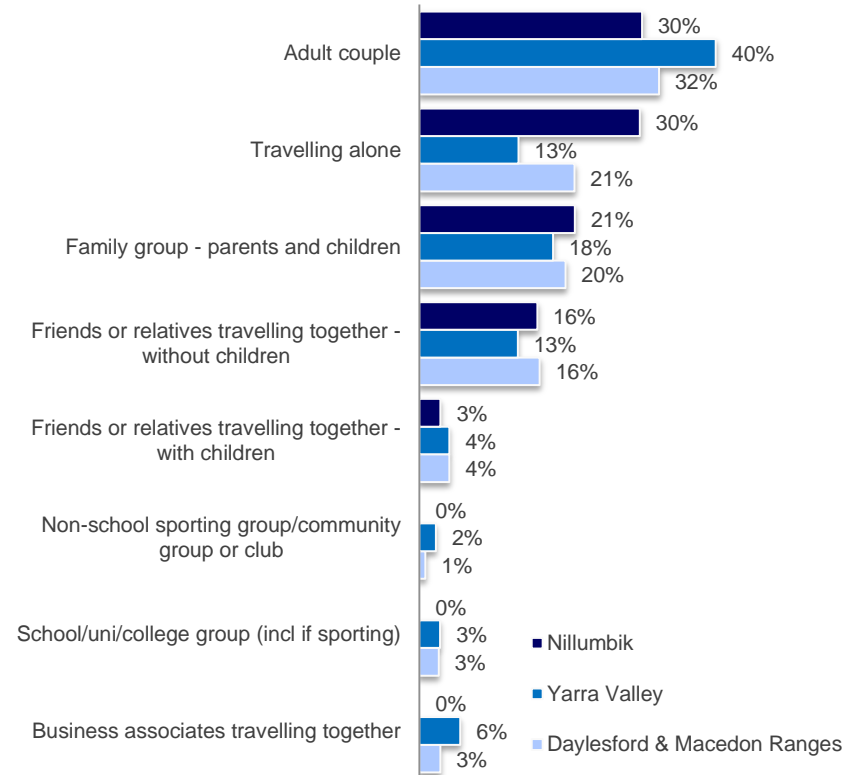
3.3.7. OVERNIGHT TRAVEL PARTY

By travel party type, overnight visitors to the Nillumbik Shire have a similar profile to regional destinations such as the Yarra Valley and Daylesford & Macedon Ranges, with a slightly lower proportion of Adult couples travelling together.

The leading travel party type to the Yarra Valley and Daylesford & Macedon Ranges is Adult Couple, 42% and 32%, respectively. The Nillumbik Shire however has an equal proportion of Adult couples and visitors Travelling alone, each 30%.

Family groups (parents and children) make up 21% of overnight travel party types to the Nillumbik Shire, similar to Daylesford and Macedon Ranges (20%) and slightly higher than the Yarra Valley (18%).

FIGURE 6 OVERNIGHT-VISITOR TRAVEL PARTY



Source: Tourism Research Australia, NVS, 5 years to September 2014

4. NILLUMBIK VISITOR SURVEY

4.1. INTRODUCTION

Urban Enterprise undertook a visitor survey for the Nillumbik Shire to provide additional primary visitor research targeted to existing visitors to Nillumbik. 180 surveys were collected at key destinations. Urban Enterprise gratefully acknowledges Montsalvat, the Diamond Valley Miniature Railway and the organisers of the St Andrews market for assisting the project team in collecting these survey responses.

The survey sought to find out destinations and attractions visited, purpose of visit, information sources used, previous visitation and frequency, activities, satisfaction, overnight trips and accommodation type, and key demographics including travel party type, age group, and postcode or country of origin.

4.2. METHODOLOGY

During the months of April and May 2014, a sample of 180 surveys was collected in Eltham, St Andrews, Greensborough, Panton Hill and Smiths Gully, including at key attractions Montsalvat, the Diamond Valley Miniature Railway, and the St Andrews market. There was a high concentration of responses from the Diamond Valley Miniature Railway and the St Andrews market therefore the survey findings are skewed to represent these particular visitor markets, however as there was also a higher concentration of visitors in these two locations the total results are reasonably considered to be representative of visitation to the region.

The survey was completed on a printed hardcopy both as an intercept and self-completion style of survey. Survey responses were later entered into SurveyMonkey.com software for data processing.

4.3. KEY FINDINGS

DESTINATIONS VISITED

Eltham/Eltham North was the most visited destination in Nillumbik, at 73%, followed by St Andrews, 22%, and Diamond Creek, 20%. This result reflects the large attractions in Eltham: Montsalvat, Diamond Valley Miniature Railway and Edendale. The attractions combined attract around 170,000 visitors.

ATTRACTIONS VISITED

The Diamond Valley Miniature Railway was the most visited attraction in Nillumbik, at 55%, followed by Montsalvat, 31%, the St Andrews Market, 22%, and the Eltham Farmers Market, 10%.

When profiled by travel party type, respondents that indicated they were Travelling alone or as an Adult couple had a greater visitation to Montsalvat, Friends/Family travel party type had a greater than the 55% visitation to the Diamond Valley Miniature Railway, and Adult couples had greater visitation to the St Andrews market (compared to the proportion of total respondents).

When profiled by age group, respondents aged 18-34 had a greater visitation to Montsalvat, respondents aged 35-44 had a greater visitation to the Diamond Valley Miniature Railway, and respondents aged 45-64 had a greater visitation to the St Andrews Market (compared to the proportion of total respondents).

OTHER DESTINATION/REGIONS VISITING ON TRIP

20% of visitors to Nillumbik were planning to visit another destination/region on the same trip.

Of the 20% of respondents that were visiting another destination/region on the same trip, 66% were visiting the Yarra Valley, 28% were visiting Melbourne, 19% were visiting the Kinglake Region, and 13% were visiting the Dandenong Ranges. This highlights the importance of the touring market to Nillumbik and the need to work with surrounding regions.

MAIN REASON FOR VISITING NILLUMBİK

The main reason for visiting the area was “Other”, 32%, 31% of respondents were visiting the areas for Holiday/leisure/getting away, and 30% were Visiting friends and relatives.

For “Other”, 19% indicated the Diamond Valley Miniature Railway, and 17% to visit a Market.

The visitor survey highlights the high level of single destination trips. Packaging attractions and provision of quality visitor information should be considered as methods to increase dispersal throughout the region.

INFORMATION SOURCES USED TO PLAN TRIP

Very few visitors used formal information sources when planning their trip to Nillumbik. 50% of respondents did not use any information to plan their trip, with 33% indicating they “Already know the region” and a further 17% indicating “None.”

Only 3% of respondents sourced information from a tourist publication, and only 1% each used a visitor information centre or read a newspaper/magazine for information.

TRAVEL PARTY

The leading type of travel party type was Family group, at 55% of responses. 11% of respondents were travelling as an Adults couple, and 8% were travelling alone. 4% indicated “Other”, which were predominantly cycling groups.

ACTIVITIES DURING VISIT

The leading activity undertaken during a visit to the Nillumbik area was General sightseeing at 40%, followed by Other at 23%, Eat out (restaurants/cafes) at 23%, Other outdoor activities at 22%, Visit friends and relatives at 19%, Visit local produce/food & wine suppliers or markets at 18%, and Picnics/bbq at 17%.

When profiled by travel party type, respondents travelling as an Adult couple had a greater proportion undertaking the following activities: Art galleries and/or artists, Eating out, Visit local produce suppliers or markets, Visit wineries, and visiting History/Heritage sites (compared to the proportion of total respondents).

When profiled by age group, respondents aged 45-64 had a greater percentage than total respondents for Visiting local produce supplier or markets.

SATISFACTION WITH EXPERIENCE OF THE REGION

81% of respondents were Very satisfied with their experience of the region, 17% were Fairly satisfied, 2% were Neither satisfied or dissatisfied, 1% were Fairly dissatisfied and 0% were Very dissatisfied.

Comments about the general Nillumbik area included “improvement in directional road signs” and “more bbqs” needed.

Comments about Eltham included: “aggressive drivers” and lots of “traffic”, and a suggestion that the “Eltham North Adventure Park needs upgrading”.

Comments for the St Andrews market included: “more parking needed”, “more public toilets and better maintained”, “main entrance not clear”, needs a “safe road crossing” and “better signage”.

A suggestion for Kangaroo Ground was for “improved road shoulders for cycling”.

Highlights of visit included the Diamond Valley Miniature Railway, Montsalvat, seeing friends and family, visiting local markets (including food and produce), enjoying the countryside, and cycling on challenging roads.

AGE GROUP

41% of respondents were aged 35-44, followed by 16% aged 25-34, 15% aged 45-54, 10% aged 18-24, 8% aged 55-64, 7% aged over 65, and 3% aged under 18.

Adult couples were mostly aged over 55, whilst family and friend groups had a high proportion of visitors aged 25-44. This shows that the two key visitor groups or Nillumbik are “Older adult couples and midlife families with children.

ACCOMMODATION

Of the 21% of respondents that were staying or planning to stay overnight in the area, 68% were staying at a Friends or relatives home, 14% in a Hotel, 7% in a Motel, and 4% each in a Self-contained apartment/cottage, Camping, and Holiday home.

VISITOR ORIGIN

Analysis of the respondents’ postcodes indicated clusters of visitors from in the inner northern and eastern suburbs of Melbourne.

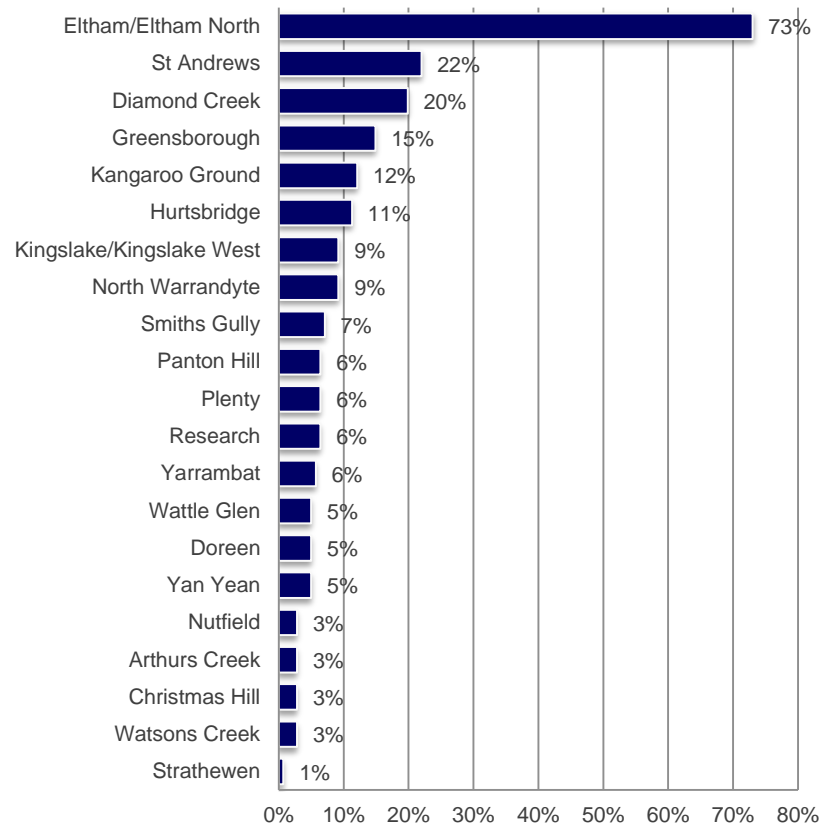
4.4. RESULTS

This section outlines the results from each question asked in the survey. Market profiling results by travel party type and age group are presented where such findings are noteworthy.

Q1. HAVE YOU VISITED OR ARE YOU PLANNING TO VISIT ANY OF THE FOLLOWING LOCATIONS ON THIS TRIP?

Eltham/Eltham North was the most visited destination in Nillumbik, at 73%, followed by St Andrews, 22%, and Diamond Creek, 20%.

FIGURE 7 DESTINATIONS VISITED



Respondents that indicated they were Travelling alone, or aged 18-34 or 35-44 had a greater proportion of visitors to Eltham/Eltham North (93%, 79% and 78%, respectively, compared to 73% of total respondents visiting the destination).

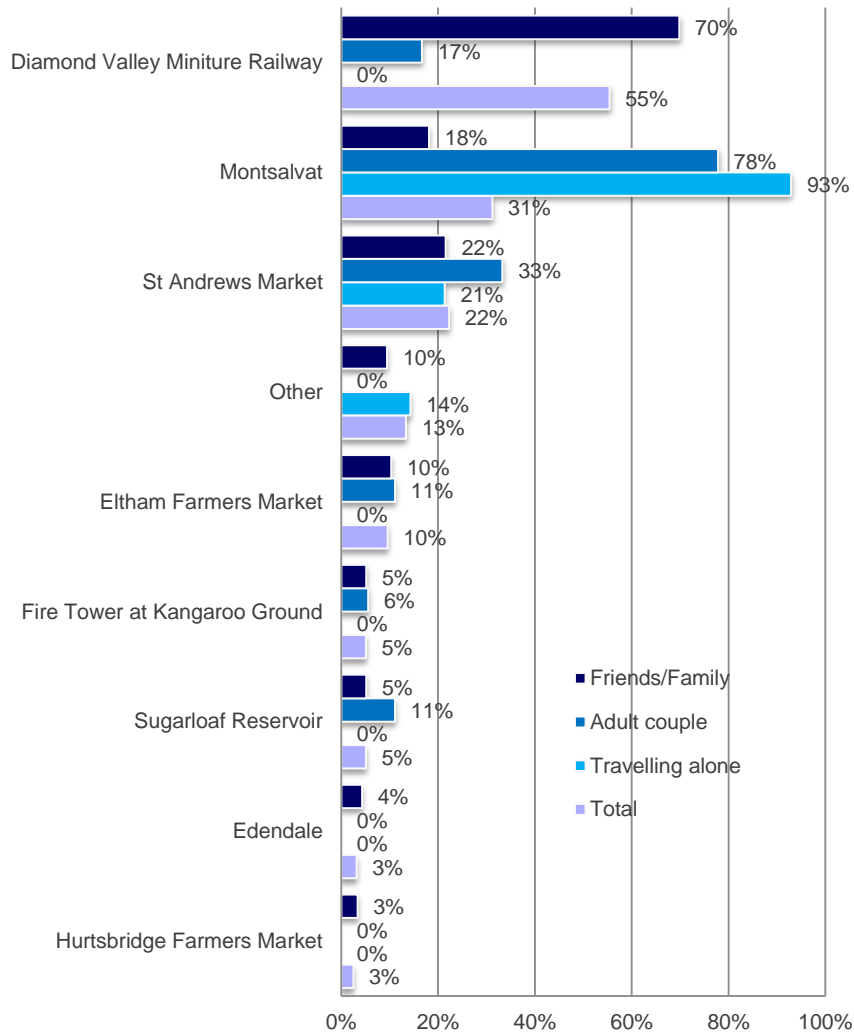
Respondents that indicated they were travelling as an Adult couple or aged 45-64 had a greater proportion of visitors to St Andrews (33% and 36% respectively, compared to 22% of total respondents' visiting the destination).

Q2. WHAT ATTRACTIONS HAVE YOU VISITED OR ARE YOU PLANNING TO VISIT ON THIS TRIP?

The Diamond Valley Miniature Railway was the most visited attraction in Nillumbik, at 55%, followed by Montsalvat, 31%, the St Andrews Market, 22%, and the Eltham Farmers Market, 10%.

When profiled by travel party type, respondents that indicated they were Travelling alone or as an Adult couple had a greater visitation to Montsalvat (93% and 79% and 78%, respectively, compared to 31% of total). 78% of the Friends/Family travel party type visited the Diamond Valley Miniature Railway, far greater than the 55% visitation by total respondents. Adult couples also had greater visitation to the St Andrews market, 33% than total respondents, 22%.

FIGURE 8 ATTRACTIONS VISITED BY TRAVEL PARTY TYPE

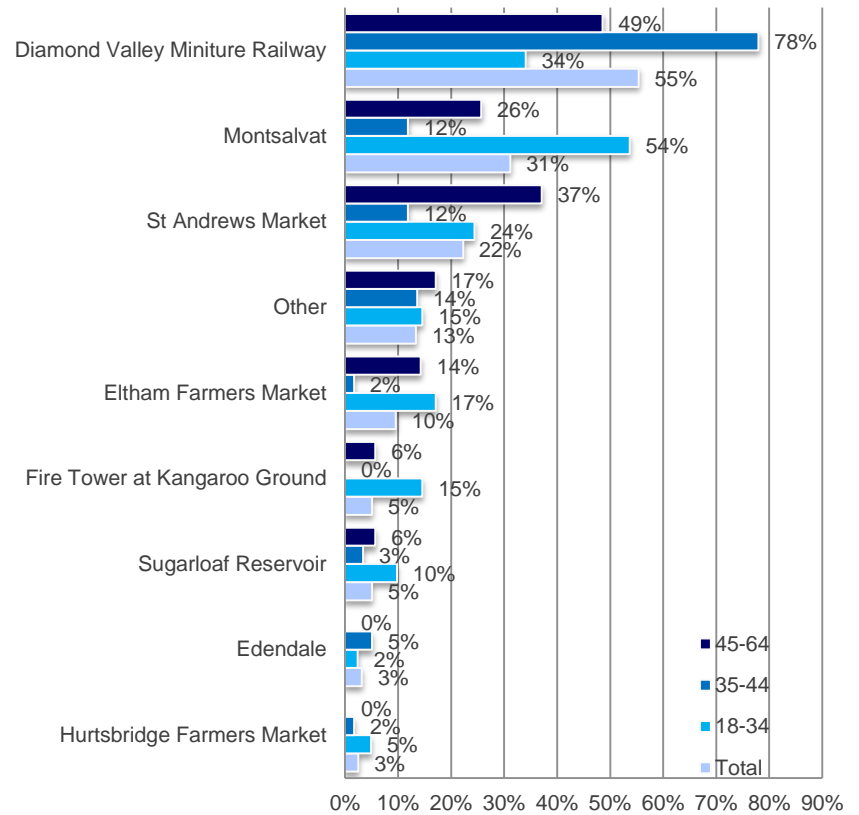


When profiled by age group, respondents aged 18-34 had a greater visitation to Montsalvat, 54%, than total respondents', 31%.

78% of respondents aged 35-44 visited the Diamond Valley Miniature Railway, compared to 55% of total respondents.

37% of respondents aged 45-64 visited the St Andrews Market, compared to 22% of total respondents.

FIGURE 9 ATTRACTIONS VISITED BY AGE GROUP



Q3. HAVE YOU OR ARE YOU PLANNING TO VISIT ANOTHER DESTINATION/REGION ON THIS TRIP?

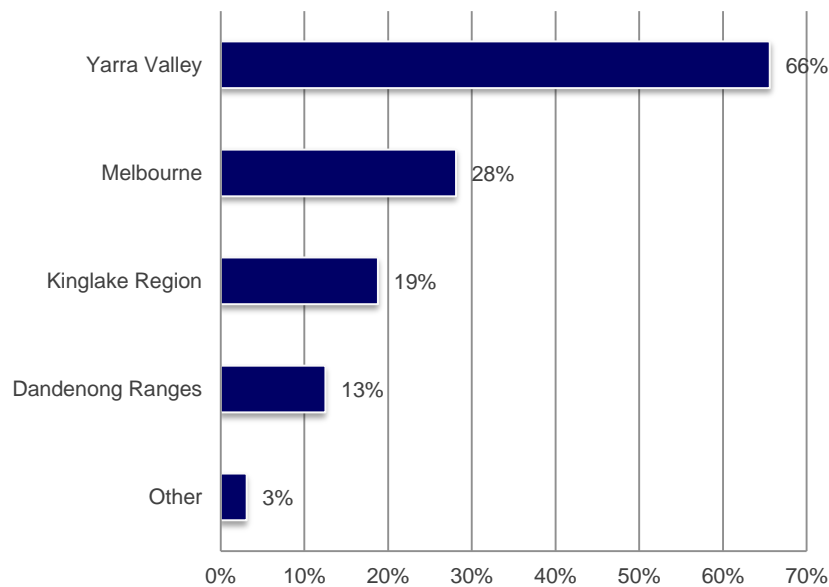
20% of visitors to Nillumbik were planning to visit another destination/region on the same trip.

Respondents aged 18-34 were more likely to be visiting another destination on the same trip (29% and 28%, respectively), and visitors aged 35-44 were the least likely (11%).

Q4. IF YOU HAVE/ARE PLANNING TO VISIT ANOTHER DESTINATION ON THIS TRIP, WHICH DESTINATION IS IT?

Of the 20% of respondents that were visiting another destination/region on the same trip, 66% were visiting the Yarra Valley, 28% were visiting Melbourne, 19% were visiting the Kinglake Region, and 13% were visiting the Dandenong Ranges.

FIGURE 10 OTHER DESTINATIONS/REGIONS VISITING ON TRIP

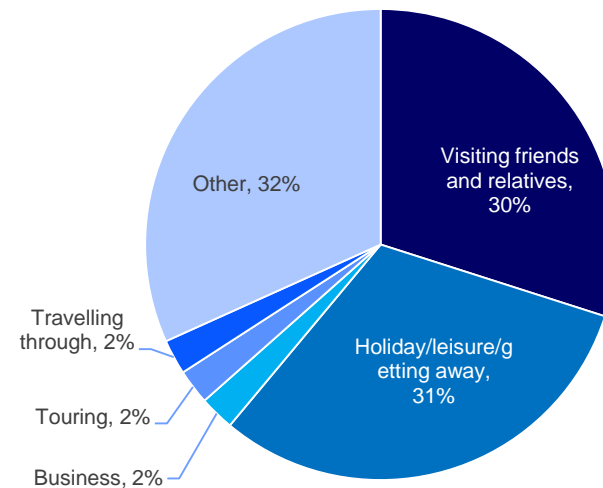


Q5. WHAT WAS YOUR MAIN REASON FOR VISITING THE AREA?

The main reason for visiting the area was “Other”, 32%, 31% of respondents were visiting the areas for Holiday/leisure/getting away, and 30% were Visiting friends and relatives.

Regarding responses indicating “Other” (32%) reasons for visiting, 21% indicated that they lived locally or nearby, 19% indicated visiting the Diamond Valley Miniature Railway as their main purpose, 17% for a Market, 15% for a Birthday or kids party, 12% for a Wedding, 8% for Cycling, 4% for Shopping, and 2% for each Montsalvat and the Eltham little theatre.

FIGURE 11 MAIN REASON FOR VISITING THE AREA

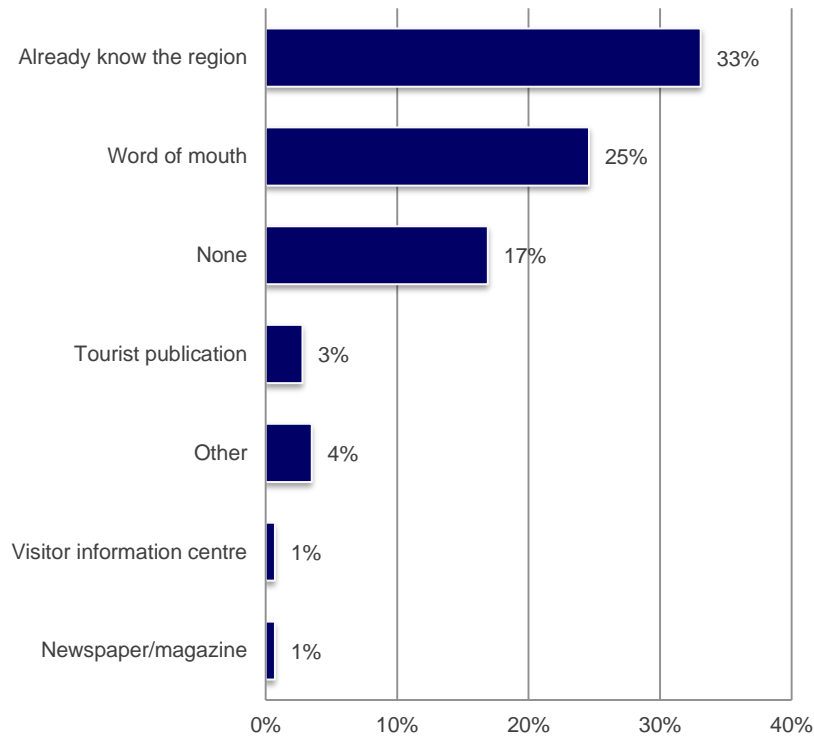


Q6. WHAT INFORMATION SOURCES DID YOU USE TO PLAN YOUR TRIP?

50% of respondents did not use any information to plan their trip, with 33% indicating they “Already know the region” and a further 17% indicating “None.” A further 25% of respondent sourced information via Word of Mouth.

Only 3% of respondents sourced information from a tourist publication, and only 1% each used a visitor information centre or read a newspaper/magazine for information.

FIGURE 12 INFORMATION SOURCES USED TO PLAN TRIP



Q7. HAVE YOU VISITED THE AREA PREVIOUSLY?

81% of respondents had visited the region previously.

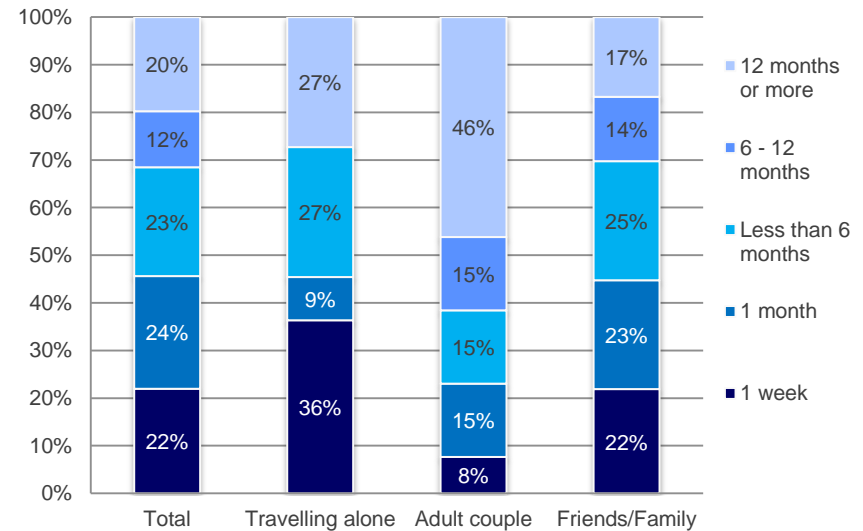
Visitors that were aged 18-34 were more likely to have not visited previously (24%), and visitors aged 45-64 were the least likely to be visiting for the first time (3%).

Q8. IF YOU HAVE VISITED PREVIOUSLY, HOW LONG AGO?

Of the 81% of respondents who had visited the area previously, 22% had visited 1 week ago, 24% had visited 1 month ago, 23% had visited less than 6 months ago, 12% had visited 6 to 12 months ago, and 20% had visited 12 months or more.

A greater proportion of visitors travelling alone had visited 1 week ago, 36% compared to the total respondents' 22%, whilst a greater proportion of visitors travelling as an Adult couple had visited over 12 months ago, 46% compared to the total respondents' 20%.

FIGURE 13 TIME SINCE PREVIOUS VISIT - BY TRAVEL PARTY TYPES

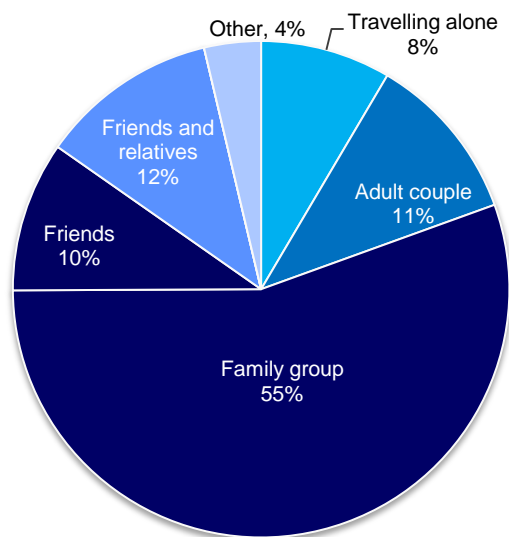


Q9. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR TRAVEL PARTY?

The leading type of travel party type was Family group, at 55% of responses. For the purpose of market profiling, Family group (55%), Friends and relatives (12%) and Friends (10%) travel party types were combined to form Friends/Family.)

11% of respondents were travelling as an Adults couple, and 8% were travelling alone. 4% indicated "Other", which were predominantly cycling groups.

FIGURE 14 TRAVEL PARTY TYPE



Q10. HOW MANY PEOPLE ARE THERE IN YOUR TRAVEL GROUP (INCLUDING YOURSELF)?

The median travel party size was 4, and the mean travel party size 5.9.

Q11. WHAT ARE THE MAIN ACTIVITIES THAT YOU HAVE UNDERTAKEN, OR INTEND TO UNDERTAKE, DURING YOUR VISIT TO THE AREA?

The leading activity undertaken during a visit to the Nillumbik area was General sightseeing at 40%, followed by Other at 23%, Eat out (restaurants/cafes) at 23%, Other outdoor activities at 22%, Visit friends and relatives at 19%, Visit local produce/food & wine suppliers or markets at 18%, and Picnics/bbq at 17%.

When profiled by travel party type, respondents travelling as an Adult couple had a greater percentage than total respondents for Art galleries and/or artists (47% visitation compared to 12%), Eating out (47% compared to 23%), Visit local produce suppliers or markets (29% compared to 18%), Visit wineries (18% compared to 9%), and visiting History/Heritage sites (18% compared to 6%).

When profiled by age group, respondents aged 45-64 had a greater percentage than total respondents for Visiting local produce supplier or markets (31% compared to 18%).

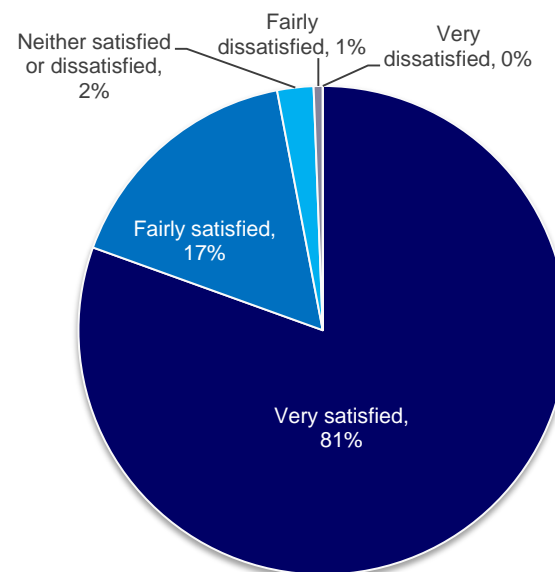
FIGURE 15 ACTIVITIES DURING VISIT

Activities during trip	Total	Travel party type			Age group		
		Travelling alone	Adult couple	Friends/Family	18-34	35-44	45-64
General sightseeing	40%	57%	94%	32%	54%	24%	46%
Visit national/state parks or public gardens	7%	7%	6%	7%	7%	7%	6%
Bushwalking	7%	0%	0%	8%	7%	5%	9%
Fishing	3%	0%	0%	3%	5%	3%	0%
Play golf	3%	0%	6%	3%	5%	5%	0%
Other outdoor activities	22%	0%	18%	26%	15%	32%	11%
Attend festivals or cultural events	6%	7%	0%	7%	2%	3%	9%
Visit history/heritage buildings, sites or monuments	6%	0%	18%	6%	5%	7%	6%
Visit art galleries and/or artists	12%	14%	47%	7%	12%	5%	14%
Go on guided tours/excursions	1%	0%	0%	1%	0%	2%	0%
Visit wineries	9%	0%	18%	8%	10%	8%	9%
Visit friends and relatives	19%	14%	24%	19%	15%	19%	26%
Eat out (restaurants/cafes)	23%	14%	47%	20%	27%	18%	23%
Visit local produce/food & wine suppliers or markets	18%	14%	29%	18%	20%	8%	31%
Go shopping (for pleasure)	11%	14%	12%	12%	15%	10%	14%
Picnics/bbq	17%	0%	12%	20%	17%	23%	11%
Touring	4%	0%	6%	4%	7%	0%	9%
Cycling	5%	0%	0%	3%	2%	8%	6%
Other	23%	29%	12%	25%	22%	21%	26%

Q12. OVERALL HOW SATISFIED OR DISSATISFIED WERE YOU WITH YOUR EXPERIENCE OF THE REGION?

81% of respondents were Very satisfied with their experience of the region, 17% were Fairly satisfied, 2% were Neither satisfied or dissatisfied, 1% were Fairly dissatisfied and 0% were Very dissatisfied.

FIGURE 16 SATISFACTION WITH EXPERIENCE OF THE REGION



Q13. IF YOU WERE NOT SATISFIED WITH ANY ASPECT OF YOUR VISIT TO NILLUMBIK SHIRE, PLEASE SPECIFY WHAT YOU FEEL NEEDS TO BE IMPROVED AND PLEASE PROVIDE THE LOCATION/S.

Comments about Eltham included: “aggressive drivers” and lots of “traffic”, and a suggestion that the “Eltham North Adventure Park needs upgrading”.

Comments for the St Andrews market included: “more parking needed”, “more public toilets and better maintained”, “main entrance not clear”, needs a “safe road crossing” and “better signage”.

A suggestion for Kangaroo Ground was for “improved road shoulders for cycling”.

Comments about the Diamond Valley Miniature Railways included: “needs another playground”, “more picnic tables”, “more parking”, and “an annual membership rate”.

Comments about the general Nillumbik area included “placing in directional road signs” and “more bbqs” needed.

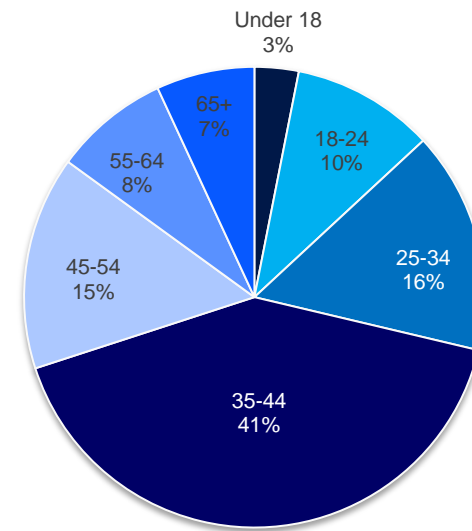
Q14. WHAT WAS THE HIGHLIGHT OF YOUR VISIT AND WHY?

The Diamond Valley Miniature Railway, Montsalvat, seeing friends and family, visiting local markets (including food and produce), enjoying the countryside, cycling on challenging roads, the friendly people, and enjoying the local food and craft bars were listed as trip highlights.

Q15. WHAT AGE GROUP ARE YOU IN? TICK ONE BOX ONLY.

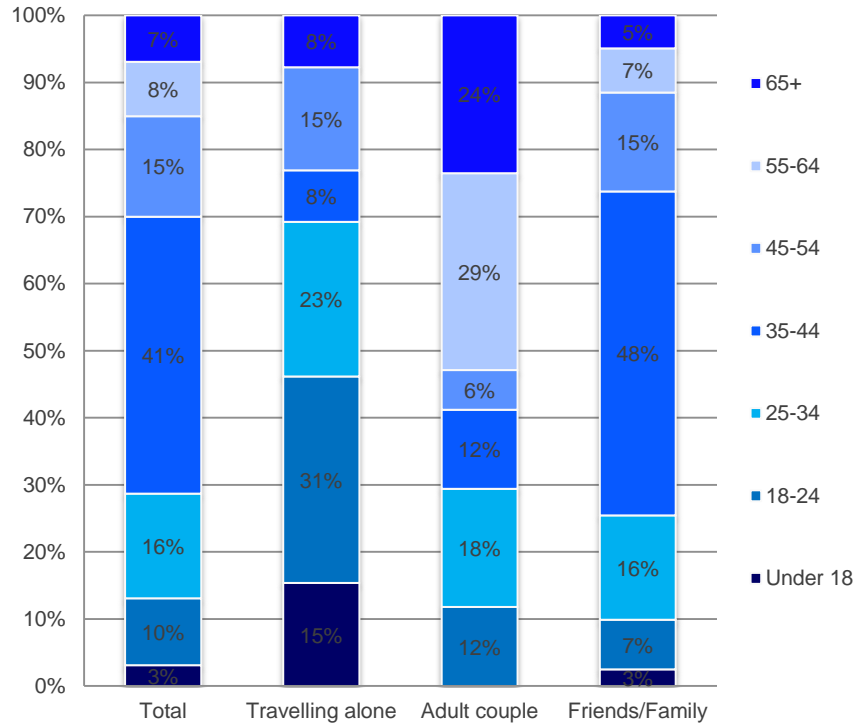
41% of respondents were aged 35-44, followed by 16% aged 25-34, 15% aged 45-54, 10% aged 18-24, 8% aged 55-64, 7% aged over 65, and 3% aged under 18.

FIGURE 17 AGE GROUP



The travel party type Travelling alone had a greater proportion of respondents age 18-34, Adult couples had a greater proportion of respondents aged over 55, and Friends/Family had a greater proportion of respondents aged 35-44.

FIGURE 18 AGE GROUP BY TRAVEL PARTY TYPE



Q16. DID YOU STAY OR ARE YOU PLANNING TO STAY IN THE AREA OVERNIGHT?

21% of visitors to Nillumbik were staying or planning to stay in the area overnight.

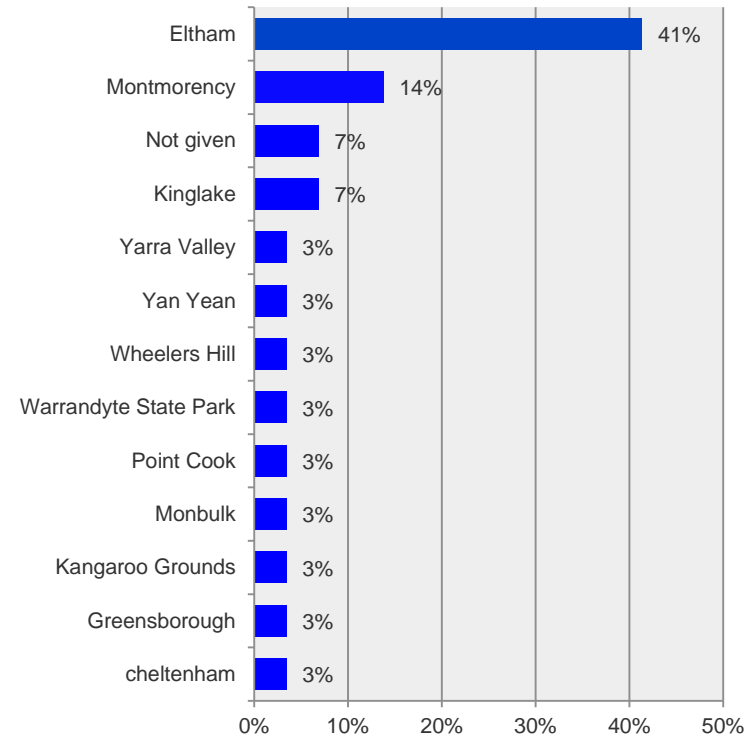
Visitors that were Travelling alone, as an Adult couple, or aged 18-34 had the greatest proportion of respondents staying overnight. Friends/family and respondents aged 35-44 had the smallest proportion of overnight visitors.

Q17. IF NO, WHY NOT?

Of the 79% of respondents that were not staying overnight in the area, 64% indicated that they live nearby, 26% indicated just a daytrip, and 5% indicated just visiting for cycling. Other responses included “expensive accommodation”, “have small kids” and “staying in Healesville”.

Q18. IF YES, WHICH TOWN OR LOCATION ARE YOU STAYING IN?

Of the 21% of respondents that were staying or planning to stay in the area, 41% were staying in Eltham.



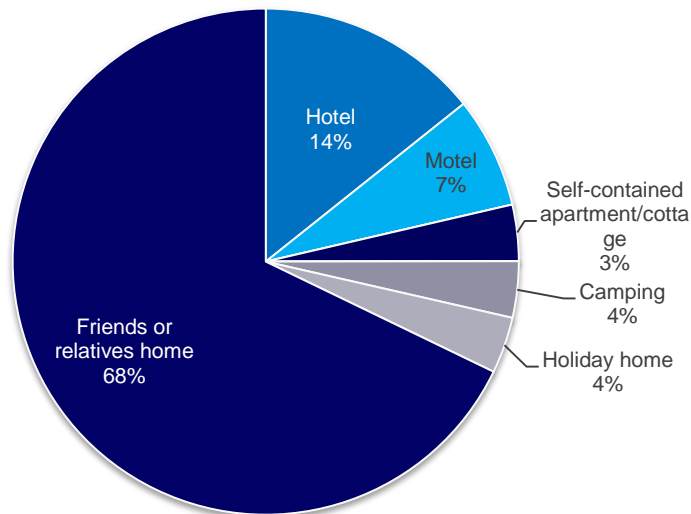
Q19. IF YES, FOR HOW MANY NIGHTS?

The median number of nights was 3, and the mean number of nights was 7.7.

Q20. IF YES, WHAT TYPE OF ACCOMMODATION DID YOU STAY IN OR ARE YOU PLANNING TO STAY IN?

Of the 21% of respondents that were staying or planning to stay overnight in the area, 68% were staying at a Friends or relatives home, 14% in a Hotel, 7% in a Motel, and 4% each in a Self-contained apartment/cottage, Camping, and Holiday home.

FIGURE 19 TYPE OF ACCOMMODATION

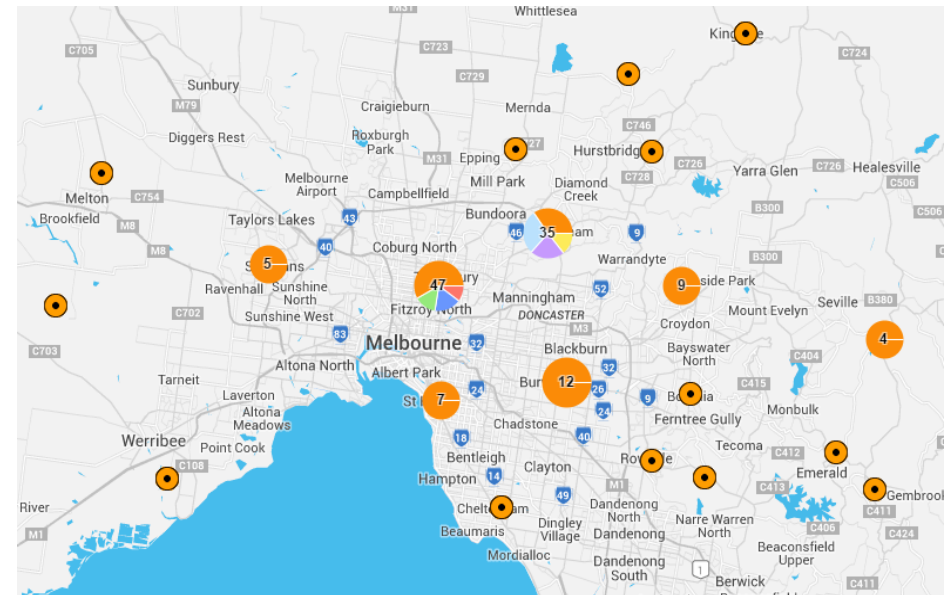


Q21. WHAT IS THE POSTCODE OF THE SUBURB/TOWN THAT YOU LIVE IN?

A map of the respondents' postcodes (n=154) indicated clusters of visitors from in the inner northern and eastern suburbs of Melbourne.

Note that some respondent's postcodes are not shown in the map, and that also 5% of respondents were from interstate.

FIGURE 20 VISITORS BY POSTCODE



Q22. FOR OVERSEAS VISITORS, WHAT COUNTRY DO YOU LIVE IN?

Only 3 respondents were overseas visitors; from the United States, New Zealand, and the United Kingdom.

5. KEY MARKET SEGMENTS

5.1. INTRODUCTION

Urban Enterprise has identified the following markets as key to Nillumbik's visitor economy. These markets have been identified through an analysis of primary and secondary visitor data.

The market segments draw on segmentation from Tourism Victoria.

5.2. KEY FINDINGS

The key target markets for Nillumbik based on the current product and experience offer and the existing visitors to the region includes:

- Lifestyle leaders
 - Creative Opinion Leaders
 - Food & Wine Lifestylers
 - Inspired by Nature
- Traditional Family Life

The products which match well to these segments include arts and culture, nature based, wine and family attractions.

Some of the gaps in Nillumbik's product provision which can be further developed to support these markets includes:

- Coffee culture;
- Destination dining;
- Local produce stores;
- Nature immersion experience;
- Formal wildlife experience.

5.3. KEY MARKETS

The key visitor markets for the Nillumbik include the following:

- Lifestyle Leaders (including older adult couples and mid-life middle class family groups);
- Traditional Family Life (family groups).

The activity and experience preferences of these markets are well matched to the product offer in the Nillumbik (food and wine, arts and culture, nature-based, recreation, and agri-tourism). Although data is not available on the size of these markets currently visiting the Nillumbik, they represent over 70% of visitor trips in Victoria.

5.3.1. LIFESTYLE LEADERS

Tourism Victoria has identified a broad domestic target market termed 'Lifestyle Leaders' which has also been adopted as a key target market in the Nillumbik. This market segmentation was developed by Tourism Victoria to ensure that marketing, product development, and investment priorities are matched with the portion of the Australian population who have the means and propensity to travel, and attitudinally provide a match with Victoria's tourism offering and wider strategic objectives.

The 'Lifestyle Leaders' segment cuts across a number of age and socio economic groups and represents approximately 4.1 million people and make up 29 per cent of Australia's population².

They are generally more affluent and have a higher level of discretionary expenditure than the general population so they can afford to indulge more often in travel, with a particular desire to escape urban life and embrace nature/outdoors and new discoveries.

Lifestyle leaders can also be targeted through their motivational drivers, specific passions and interests. The Lifestyle Leader population are categorised into four sub-segments as summarised in Table 4

² Victoria's Regional Tourism Strategy 2013-2016

The activities available within Nillumbik including arts, nature-based, recreation, and food and wine experiences, are well matched to preferences of the Lifestyle Leaders market, particularly the Creative Opinion Leaders, Food and Wine Lifestylers and Inspired by Nature sub-segments.

5.3.2. TRADITIONAL FAMILY LIFE

In addition to the high yielding domestic markets, an important segment to the Nillumbik is the *'Traditional Family Life'* market, which personifies middle-aging Australia-home owners, typically empty nesters, with a relatively stable income. Energies revolve around them spending time with extended family, health and wellness activities, and community engagement.

The Traditional Family Life market segment are also keen holiday tourers, with high use of caravans and campervans, or preference for comfortable but good value standard accommodation. Sightseeing is an important aspect of their holiday experience, with a greater tendency to visit museums, art galleries, historical places, and wineries. Visiting friends or relatives is an important aspect of their holiday experience.

Products in Nillumbik that would align with the Traditional Family Life holiday preferences would include the Diamond Valley Miniature Railway, the extensive parks and gardens, arts and craft attractions, and local wineries.

TABLE 4 LIFESTYLE LEADERS MARKET SUB-SEGMENTS

Sub-segment	Key Experiences	Description	Nillumbik Product Match	Nillumbik Gaps
Creative Opinion Leaders	<ul style="list-style-type: none"> - Creative arts - Coffee culture - Art galleries - Events 	Seek cultural and creative pursuits and are open to new experiences and new ideas. They like to be amongst the first to discover new places and experiences to satisfy their desire to explore.	<p>Montsalvat</p> <p>Independent galleries</p> <p>Art trail</p>	Coffee culture
Food & Wine Lifestylers	<ul style="list-style-type: none"> - Destination dining - Wineries and cellar doors - Local produce and farmers markets 	Seek authentic, original and creative food and wine experiences, often combined with other cultural and soft adventure activities.	<p>Wineries</p> <p>Farmers markets</p>	<p>Destination dining</p> <p>Local produce stores</p>
Enriched Wellbeing	<ul style="list-style-type: none"> - Natural mineral and geothermal springs - Villages - Outdoors and recreation 	Seek luxurious breaks to indulge personal passions within a culturally rich, natural or rejuvenating setting. They want to enrich their mind, body and soul, seeing a nature escape as an antidote to busy city life.	Parks and reserves	Spa and wellbeing facility
Inspired by Nature	<ul style="list-style-type: none"> - Natural landscapes - Experiences with nature - Wildlife - Walks and cycling 	<p>Seek active breaks where they can enjoy opportunities to re-connect with one another and nature.</p> <p>They regularly get away for weekends, and want a choice of activities that allow them to get active to varied degrees, from hiking and cycling to shopping and dining. Have preference for eco-tourism experience where respect for natural surrounds is paramount.</p>	<p>Natural bushland</p> <p>Incidental wildlife experience</p> <p>Walks and cycling</p>	Formal wildlife experience
Traditional Family Life	<ul style="list-style-type: none"> - Meeting and mixing with other people; -Country wildlife and scenery; -Family friendly -Wineries; and -Touring. 	Seek leisure activities for the family to enjoy together. Enjoy high quality experiences but which are good value or money.	<p>Wineries</p> <p>Diamond Valley Railway</p> <p>Edendale Community Environment Farm</p> <p>Playgrounds</p>	<p>Local produce stores</p> <p>Picnic facilities</p>

*Sub-segments are not mutually exclusive and individuals can be matched to multiple sub-segments.

Source: Tourism Victoria 2015, Great Ocean Road Market Profile December 2013

6. TOURISM PRODUCT ANALYSIS

6.1. INTRODUCTION

This section provides an overview of tourism product within Nillumbik Shire, based on information received from Council, marketing materials, consultation and web based research. The audit has been prepared to understand the diversity of product across the region and identify current gaps in the tourism offer.

6.2. KEY FINDINGS

Nillumbik's key product strengths include:

- Sustainability and Environment;
- Authentic Arts, Heritage, and Culture;
- Wine;
- Nature Based Tourism;
- Family product.

Key gaps and opportunities for Nillumbik's product and infrastructure include:

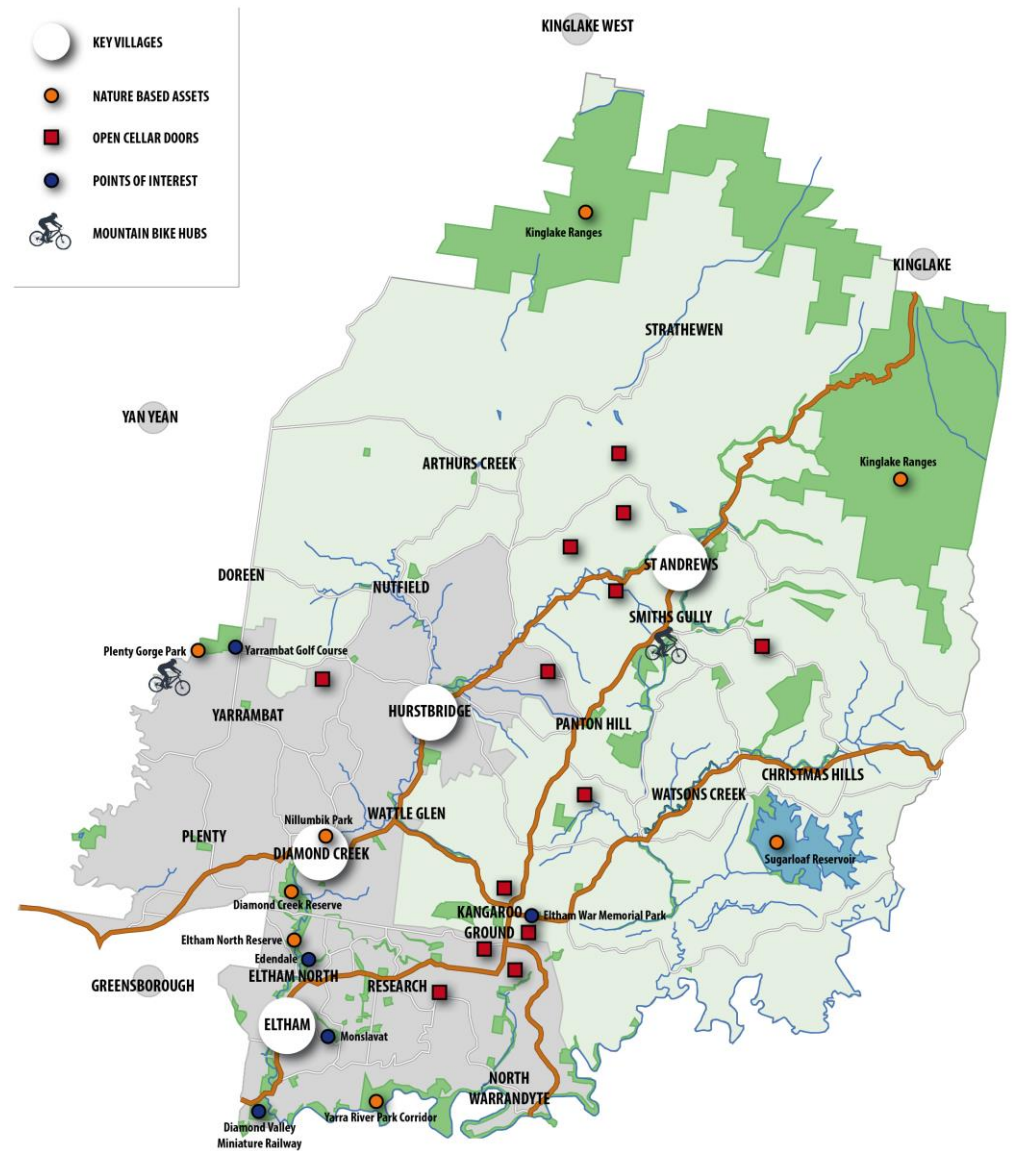
- Improvement of amenity and infrastructure within nature based assets such as trails signage, expansion of trail network, BBQ areas, walking trails and interpretation and adventure playgrounds;
- Expansion of accommodation, particularly quality boutique accommodation, serviced apartments and camping;
- Large conference centre targeting the business market;
- Improvement to road shoulders for road cycling along key designated routes;
- Establishment and improvement of the dining offer;
- Wellness centres;
- Packaging of arts product with other activities.

6.3. PRODUCT MAPPING AND DISTRIBUTION

The dispersal of tourism product is demonstrated on the following map. Key findings include:

- Winery nodes are concentrated to the Kangaroo Ground Plateau and Cottles Bridge/ St Andrews.
- Nature based tourism is dispersed widely through the Shire with key nodes being along the Shire's boundaries: Yarra River Park Corridor, Sugarloaf Reservoir, Kinglake Ranges and Plenty Gorge Parkland.
- There are two key family attractions in Nillumbik being the Diamond Valley Miniature Railway and Edendale Farm, both located in Eltham.
- All of the well-developed attractions including the Miniature Railway, Edendale and Montslavat are located in Eltham, whilst there are very few larger attractions in the Diamond Creek-St Andrews corridor.

FIGURE 21 PRODUCT DISPERSAL: NILLUMBIK



6.4. TOURISM PRODUCT

6.4.1. ACCOMMODATION

An audit of accommodation across the shire found a total of 9 commercial establishments with 35 rooms.

The Eltham Gateway Hotel and Conference Centre is the largest establishment with 38 rooms. The remainder of the accommodation supply is made up of a small motel and smaller B&Bs, some of which are in the more rural areas of the municipality.

An important trend in tourism accommodation has been the recent emergence of websites which allow for the short-term rental of private residences for visitors (e.g. AirBnB, Stayz). There are at least 20 residences available to rent through AirBnB in Nillumbik and this accommodation type is likely to continue to grow.

Quest Bundoora, with 71 suites, is the closest accommodation establishment to the Nillumbik Shire with a capacity for servicing large groups. This facility is in the City of Whittlesea.

The low supply of accommodation will have a large impact on the yield from visitors to Nillumbik with the vast majority of overnight visitors staying with friends and relatives. It is difficult to see demand would support a large accommodation establishment at this time unless it was collocated with another attraction of facility such as a large conference centre.

There however may be opportunity however for more boutique accommodation such as farm stays, B&Bs, self-contained cottages, or serviced apartments.

Low cost camping may also be considered for touring and nature based visitors.

TABLE 5 ACCOMMODATION IN NILLUMBIK SHIRE

Establishment	Town	No. of rooms	Type
Eltham Motor Inn	Eltham	16	Motel
Eltham South Lodge	Eltham	2	B&B (fully-self-contained)
Cantala B&B	Eltham	2	B&B
Crest Castle B&B	Research	4	B&B
Diamond Creek B & B at 'The Farm'	Diamond Creek	2	B&B
Indarra Bed and Breakfast	St Andrews	3	B&B
Pine Ridge B&B	Hurstbridge	3	B&B
Moss Glen on Panton Hill	Panton Hill	1	B&B (fully-self-contained)
t'Praethuys Bed and Breakfast	Hurstbridge	2	B&B
Eltham Gateway	Eltham	38	Hotel, Conference /Function Centre
Total		73	

6.4.2. NATURE BASED TOURISM

A key strength for the Nillumbik Shire are the nature based assets that are used for tourism purposes. These include the following parklands and reserves:

- Plenty Gorge Parklands - with picnic and barbecue facilities, mountain biking, bushwalking and bird/wildlife watching;
- Smiths Gully and Panton Hill bushland reserves;
- Sugarloaf Reserve - a vital part of Melbourne's water supply, Sugarloaf Reserve in Christmas Hills is a quiet site for picnics or shore walks, with a 15km walk circumnavigating the reservoir.
- Eltham Lower Parkland;

- Kinglake National Park;
- Diamond Creek linear parkland and trail system throughout the Shire.

The Nillumbik Shire Council is currently working on releasing a Bushland Reserves Guidebook, which will be a great information source for visitors to the Shire as well as for local residents.

In addition to park reserves a key strength of Nillumbik is its network of shared use trails. The trails strategy identifies a number of key trail improvements to grow this sector.

Nillumbik has grown as a key road cycling destination for road cyclists, with key trail networks following many of the backroads and main thoroughfares through the municipality.

On the following page is a “heat map” produced by Strava, a popular GPS cycling program. The bright blue areas show the cycling trails used most.

The heat map shows two nodes of mountain biking within Nillumbik Shire:

- Plenty Gorge Parkland; and
- Smiths Gully/Christmas Hills.

The heat map also highlights the most popular road cycling routes:

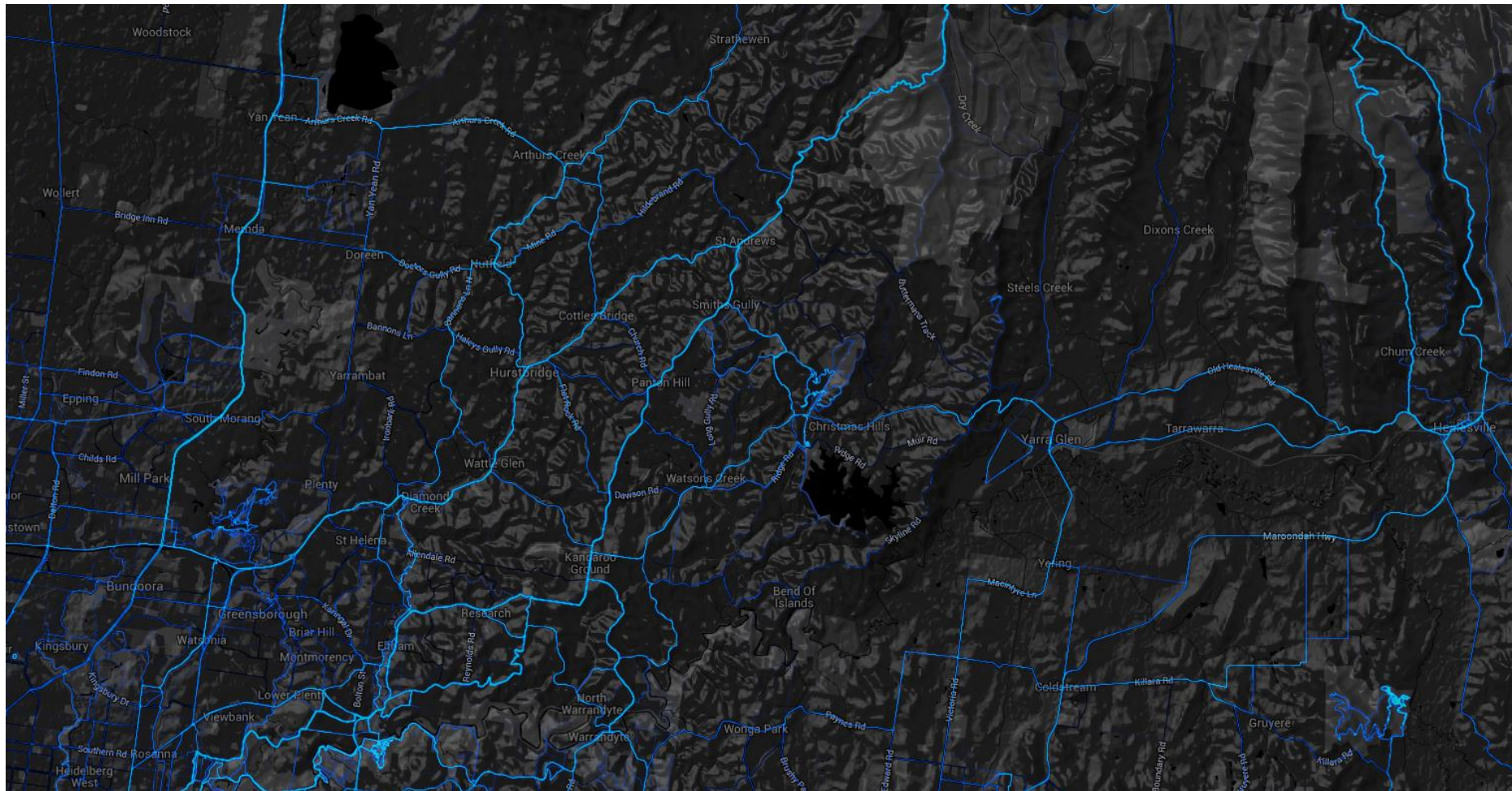
- Eltham Yarra Glen Road;
- Diamond Creek Road/ Hurstbridge Kinglake Road;
- Arthurs Creek Road;
- Mount Pleasant Road;
- Kangaroo Ground-Warrandyte Road

Other notable cycling routes include the Diamond Creek trail and a criss cross of routes throughout the Kangaroo Ground Plateau linking down to Diamond Creek and Hurstbridge.

The quality of the infrastructure in Nillumbik’s parks and reserves is variable. Many of the larger parks and reserves such as Plenty Gorge Parkland have a very basic provision of infrastructure. In order to provide the visitor with a stronger experience there is opportunity for improved amenity, interpretation and signage.

Furthermore whilst there are a large number of visitors who are undertaking nature based activities in Nillumbik the local expenditure return is limited, due to the lack of businesses that are leveraging from this. Further consideration should be made with regard to strategies for extracting greater yield from visitors to support the local economy and jobs.

FIGURE 22 STRAVA CYCLING HEAT MAP



Source: <http://labs.strava.com/heatmap/#12/145.20384/-37.64470/blue/bike>

6.4.3. AGRI-TOURISM, FOOD AND WINE

FARM-GATE PRODUCE

Visitors to Nillumbik are able to purchase locally grown produce at the fresh produce farmers markets (Hurstbridge, Eltham, St Andrews), at The Little Organic Shop in Hurstbridge (specialising in locally sourced organic produce), and at farm-gates (including orchards, mushrooms and garlic).

A Local Produce Guidebook, developed by the Nillumbik Shire Council, is a great marketing resource for promoting local farmers, and farm-gate purchase opportunities to locals and visitors to the Shire.

HOSPITALITY

The Local Food Connect program, organised as a not-for-profit community group, aims to increase the use of local produce in local restaurants, building awareness and support of local agriculture. The program is still in its infancy however has opportunity to be engaged by more cafes and restaurants, and marketed more to the consumer.

There is a lack of destination dining product in Nillumbik, however with the proximity to local agriculture and wineries, there is opportunity for this to be developed in the Shire.

WINERIES

14 wineries were identified in the Nillumbik Shire; 4 located in Kangaroo Ground, 3 in Cottles Bridge, 2 in Smiths Gully, and others located across Arthurs Creek, Diamond Creek, Pantan Hill, St Andrews and Yarrambat.

Of the 14 wineries, 8 offer a cellar door experience to visitors. Local wines are also available for tasting and purchase at local markets.

Only 4 wineries in Nillumbik offer a dining experience to visitors: Shaws Road, Swipers Gully Vineyard, Pantan Hill Vineyard & Winery, and the Nillumbik Estate.

Only 2, the Lovegrove Vineyard & Winery and the Pantan Hill Vineyard & Winery, offer functions/events facilities.

No wineries in Nillumbik offer on-site commercial accommodation.

TABLE 6 WINERIES IN THE NILLUMBIK SHIRE

Winery	Location	Cellar Door	Restaurant	Functions/Events	Accomm.
Shaws Road	Arthur Creek	✓	✓		
Hildebrand Ridge Organic Vineyard	Cottles Bridge	✓			
Lovegrove Vineyard & Winery	Cottles Bridge	✓		✓	
Wedgetail Estate	Cottles Bridge	✓			
Stockmans Wines	Diamond Creek				
Kings of Kangaroo Ground	Kangaroo Ground				
Redbox Vineyard	Kangaroo Ground	✓			
Swipers Gully Winery	Kangaroo Ground		✓		
Watson's Creek Wines	Kangaroo Ground	✓			
Naked Range Wines	Smiths Gully				
Pantan Hill Vineyard & Winery	Pantan Hill	✓	✓	✓	
Nillumbik Estate	Smiths Gully	✓	✓		
Diamond Valley Vineyard	St Andrews				
Yarrambat Estate Vineyard	Yarrambat				

Overall the agribusiness, food and wine experience in Nillumbik is an emerging one. The experience offer in Nillumbik is boutique and sets is aside from that of the Yarra Valley and other well developed regions. The quality of the food offer has room for improvement with very few destination dining experiences. The setting of Nillumbik is ripe for further food, wine and destination dining development. The high socio economic resident population and the capture of visitors from Melbourne's affluent inner north and east provides a strong market for quality food and wine experiences.

6.4.4. FAMILY PRODUCT

The analysis of visitors to Nillumbik highlights that it is a popular destination for the family market. Facilities such as Rivers of Yarrambat, Edendale and the Diamond Valley Miniature Railway cater to the family market. The family market is also drawn to the many recreational trails, parks and reserves in Nillumbik for informal recreational experiences.

ELTHAM LOWER PARK

The Diamond Valley Miniature Railway is major tourism attraction in Nillumbik, attracting 140,000 visitors annually. Open every Sunday 11am to 5pm as well as Wednesdays during the school holidays, visitors can enjoy a 15 minute ride of a miniature train, along 2km of track through the parklands. The attraction is a not for profit enterprise, run only by volunteers. Parkland visitor facilities include picnics areas with barbecues, playgrounds including a large accessible playground, restrooms, two sports oval, and regional walking trails, as well as food and beverage available at the ice cream van / food trucks and organised sausage sizzles.

LEISURE FACILITIES

The Diamond Creek Outdoor Pool is a great place for families to experience outdoor water activities. Facilities include:

- A shaded 25m heated outdoor pool
- A fenced toddler pool in a landscaped environment

The pool overlooks the wetlands and often receives visits from the local wildlife, including ducks.

The Eltham Leisure Centre is currently undergoing a redevelopment. The new aquatic facilities due for completion in late 2017, will include a 25m indoor pool, a learn to swim program pool and a warm water pool. Interactive water play equipment will bring fun for families to enjoy. An outdoor water park with BBQ areas will provide a great day out for families.

The Yarrambat Golf Course is an 18 hole golf course, café, driving range and indoor virtual golf facility. Visitors to the facility can enjoy playing golf in an environment that attracts wildlife including ducks and kangaroos.

EDENDALE

The Edendale Community Environment Farm, in Eltham, is a historic property owned and managed by the Nillumbik Shire Council. It provides the local community and visitors with an educational venue for environmental sustainability, has an indigenous plant nursery, kiosk, natural play spaces, livestock and is a venue for both community events and private parties. The Edendale Community Environment Farm is a significant agri-tourism asset for the Nillumbik Shire, supporting the conservation values of the Nillumbik green wedge zone, and with strong community engagement.

6.4.5. DESTINATION WELLNESS

Destination wellness refers to tourism related wellness product as opposed to general wellness and spa product focused towards the residential sectors. There are no purpose-built destination wellness venues for visitors in the Nillumbik Shire.

The Rivers of Yarrambat venue however has a health and wellbeing centre with a range of health and personal services available. The Rivers Beauty and Spa centre also offers day packages.

There are limited destination wellness facilities across Nillumbik that cater for a broad regional catchment.

6.4.6. ART, CULTURE AND HERITAGE

Arts, culture and heritage are strongly associated with the Nillumbik Shire. The arts and cultural heritage assets of the Shire provide a strong motivator for visits to the region. Montsalvat and the numerous smaller galleries and art studios are key to the product profile of Nillumbik.

There are many historic community organisations and heritage walks available in the Nillumbik Shire, as well as some key historic attractions available for visitors including Ellis Cottage and the kangaroo Ground Heritage Ross Museum. Some of the key attractions for visitors are described below.

ELTHAM MUDBRICK TOURS

The Eltham Mudbrick Tour is a popular heritage tour in Nillumbik, exploring the areas unique style of mudbrick architecture and historic buildings. Hour-long or day-long tours of local mudbrick architecture, starting from Montsalvat and with a shuttle bus provided, are popular with both local residents and visitors to the Shire.

KANGAROO GROUND

Kangaroo Ground War Memorial Park and Tower of Remembrance, opened in 1926, offers 360 degree views of Melbourne, the north-east suburbs and the Dandenong and Kinglake Ranges. The Memorial Park has a viewing platform, toilet facilities, picnic tables and gardens.

MONTSALVAT

Montsalvat, Australia's oldest artists' community located in Eltham, with its unique buildings, gardens and cultural history, is a key attraction for visitors to the Nillumbik Shire. In 2014 Montsalvat attracted 35,000 visitors, including for weddings, picnics and to visit exhibitions, with 15,000 ticket sales for entry to visit the grounds. Montsalvat is classified by the National Trust of Australia, and is self-supporting (no funding), operating as a not for profit organisation through the Montsalvat Foundation, and Trust. It receives 80% of its income through the weddings market.

Nillumbik also has local arts studios and galleries open for visitors. Markets with local arts and craft product, such as the Eltham Community Craft and Produce Market, and the St Andrews Market, are also a strength for the area's tourism offering.

ARTS & CULTURE EVENTS

Nillumbik has a strong calendar of arts and culture events drawing people from all over the State. These include Artist Open Studios, Courthouse poetry readings, Theatre 451 events and Eltham Library Community gallery exhibitions amongst many others.

TABLE 7 OVERVIEW SUPPLY OF ART GALLERIES / CRAFT MARKETS PRODUCT IN NILLUMBİK

	Location	Product
Montsalvat	Eltham	Gallery, Studios, Art School
Heidelberg School Artists Trail	Across the Shire	Installations
Eltham Library Community Gallery	Eltham	Gallery
Eltham South Fine Art: Studios and Gallery	Eltham	Gallery, Studios
Rob's Glassworx	St Andrews	Studio, Gallery
Ev Hales (Artist)	Hurstbridge	Studio, Gallery, Art School
St Andrews Markets	St Andrews	Markets
Eltham Community Craft & Produce Market	Eltham	Markets
Bridges Restaurant & Bar	Hurstbridge	Gallery
Chris & Mary Lou Pittard	Eltham	Studio, Gallery
Jessie Pittard	Eltham	Studio
Mervyn Hannan	Eltham	Studio
Michael Wilson Gallery	Eltham	Studio, Gallery
Panton Hill Vineyard & Winery	Panton Hill	Gallery

In addition to the formal products and attractions listed above there are heritage and cultural elements of the region which have little interpretation such as the indigenous history, European settlement and the gold mining. These elements should be explored for interpretation to provide another experience layer for the visitor and reinforce the strong heritage and cultural values of the region.

6.4.7. FUNCTIONS AND CONFERENCING VENUES

The Nillumbik Shire has a limited supply of functions and conference venues, most of which currently cater exclusively to the weddings market. The Eltham Gateway has the largest range of conference facilities in the Shire.

The key facilities are listed below. These facilities generally leverage from the natural setting of Nillumbik.

Venue	Location
Inglewood Estate	Kangaroo Ground
Montsalvat	Eltham
Ballara Receptions	Eltham
Rivers of Yarrambat	Yarrambat
Bridges Restaurant and Bar	Hurstbridge
Wellers Restaurant (not currently open)	Kangaroo Ground
Eltham Reception Centre	Eltham
Eltham Gateway	Eltham
Ashton Manor	Diamond Creek

TABLE 8 FUNCTIONS / CONFERENCING VENUES

There is potential for a business orientated conference centre in the region, which can leverage off proximity to Melbourne, the natural rural setting and existing product mix. An example would be Lindenderry at Red Hill on the Mornington Peninsula. A product such as this with accommodation would lift the profile of Nillumbik significantly and drive visitation.

6.5. INFRASTRUCTURE & ACCESS

PROXIMITY

Nillumbik has good accessibility to the Tullamarine Airport and Melbourne CBD when compared with competing nature based, arts and wine destinations. By car it is only 26 minutes from Tullamarine Airport to Diamond Creek and around 37 minutes from the CBD to Eltham.

PUBLIC TRANSPORT

Public transport access to the Nillumbik Shire can be made using the Hurstbridge railway line, travelling from Flinders Street Station, with 23 stations. The line shares tracks with the South Morang from Flinders Street until Clifton Hill, then travels northeast through the City of Yarra, City of Darebin, City of Banyule, and terminating in the Nillumbik Shire at Hurstbridge Station. The service takes 1 hr 20 minutes stopping all stations from Flinders Street to Hurstbridge.

There are also a number of bus services available to and within the Nillumbik Shire.

ROAD NETWORKS

There are a number of major routes into the Nillumbik Shire that act as gateways. These include Lower Plenty Road, the Ring Road/Greensborough Bypass. Nillumbik is well linked to Melbourne's growing north, Melbourne's eastern suburbs and also the inner north through the existing road network.

7. TOURISM GOVERNANCE

7.1. INTRODUCTION

This section provides a brief overview of the governance arrangements for tourism in Nillumbik Shire and also benchmarking and case studies of other regional tourism structures in Victoria.

7.2. KEY FINDINGS

Urban Enterprise has worked for many Regional Tourism Organisations across Australia and one of the keys to a successful organisation is “human resources”. In order for a tourism region to develop into a cohesive, structured and clear brand position quality paid staff resources are essential. Whilst tourism organisations which have only volunteers are well meaning it is very difficult to achieve great advances. Volunteers in the tourism sector often have other businesses to operate and other family or work commitments.

There are benefits in having a tourism organisation external from Council, this includes:

- Creation of a stronger digital presence without Council restrictions;
- Less political intervention;
- Driven by the interests of business and not the community, which leads to stronger commercial outcomes;
- Greater flexibility and business “ownership”.

Scale is the other critical consideration for establishing a regional tourism organisation. There are very few successful examples of single municipality regional tourism organisations. Nillumbik should strongly consider partnerships with Manningham and potentially other Local Governments to achieve the scale in product and funding to create a sustainable organisation.

7.3. EXISTING NILLUMBIK TOURISM STRUCTURE

The existing structure for tourism in Nillumbik Shire is demonstrated by the diagram below. It shows that there are three core tiers of groups involved in tourism and destination management/marketing, these include Nillumbik Shire, the Nillumbik Tourism Association and local trader groups.

The Nillumbik Tourism Association and the local trader groups have very little resources to deliver initiatives and there is a lack of business and tourism planning at the local level. The organisations rely heavily on volunteer support, however the trades associations do collect money from members for marketing activities for their townships. The sustainability of business and trader groups will be an ongoing issue without dedicated resources to assist with the delivery of various initiatives.

FIGURE 23 TOURISM GOVERNANCE STRUCTURE OVERVIEW



7.4. BENCHMARKING

CASE STUDIES

Urban Enterprise has worked with many regional tourism organisations throughout Victoria and Australia. One of the longest running and best performing tourism organisations is Greater Geelong and the Bellarine Tourism. Below is a profile of the organisation to demonstrate the level of funding and resources dedicated to supporting tourism in well-developed regions. Goulburn River Valley Tourism Organisation is also included for reference as this is a relatively new organisation and smaller in terms of resourcing and capacity.

Whilst it is not expected that Nillumbik would access the same level of funding and resources, it provides an indication of the professionalism of leading tourism organisations.

TABLE 9 CASE STUDY TOURISM ORGANISATIONS: ROLES AND RESPONSIBILITIES

	Greater Geelong and the Bellarine	Goulburn River Valley Tourism Organisation
Area	3 Local Government Areas	4 Local Government Areas
Structure	Incorporated Association	Company Limited by Guarantee

Roles	Marketing Production of marketing collateral Market research Provide marketing buy-in opportunities Tourism product and infrastructure development and planning Provide training and advice to members of your organisation Maintenance of the organisation's website Provide professional development opportunities Provide industry leadership opportunities Provide networking opportunities Familiarisation tours Provide lobby power for members Operate Visitor Information Centre/s Provide a booking service for accommodation Provide a booking service for tours and activities businesses Coordinate the Official Visitor Guide Bid for business events Liaison on behalf of members with local, state and federal governments	Marketing Production of marketing collateral Market research Provide marketing buy-in opportunities Tourism product and infrastructure development and planning Provide training and advice to members of your organisation Maintenance of the organisation's website Provide professional development opportunities Provide industry leadership opportunities Provide networking opportunities Familiarisation tours
Paid Business Membership	Yes	No
Number of Paid Members	300	
Number of Staff	14	3
Number of Volunteers	110	
Annual Budget (estimate)	Over \$2 million	B/N \$200K-\$300K
Funded by	Local Government, State Government, Industry	Local Government

VICTORIAN REGIONAL TOURISM ASSOCIATION PROFILE

Urban Enterprise undertook a survey of Regional Tourism Organisations in 2012. The survey included responses from 18 RTOs in Victoria. The table below provides a profile of the “average” organisation, taken from data collected.

Overall the average figures for regional tourism organisations include:

- 4.7 FTE equivalent staff;
- 19 volunteers;
- Around \$1 million budget
- 3.9 municipalities per region.

TABLE 10 CHARACTERISTICS OF REGIONAL TOURISM ORGANISATIONS

Indicator	Average Response	Maximum	Minimum
Number of FTE Staff	4.7	14	1
Average Number of Volunteers	19	110	0
Average Budget	\$1,027,626	\$3,188,028	\$140,000
Number of Municipalities	3.9	14	1

CHARACTERISTICS OF SUCCESSFUL TOURISM ORGANISATIONS

- Multiple revenue streams. This is critical for sustainability of a tourism organisation. The tourism regions that have larger budgets are able to draw on funding from multiple LGAs, businesses and State Government.
- Business membership. Well-developed tourism organisations in Victoria have a strong membership base. This provides revenue for the organisation and also ensures that the organisation has the interests of industry in mind.
- Scale. Tourism organisations are strong when they have scale. This includes representation across a wider LGA base and also scale in the number of tourism operators.
- Support from industry. Having support and trust from industry is critical to the development of a sustainable tourism organisation. This will ensure buy in to marketing programs and a cohesive approach to visitor services.
- Experienced manager. A high quality manager and leader is required to manage a regional tourism organisation. A manager needs to be able to think strategically and have good administration skills, and importantly have a strong rapport with industry.

8. DIGITAL RESOURCES REVIEW

8.1. INTRODUCTION

This section provides a review of Nillumbik's digital presence. Digital media is now the most used information and marketing source in tourism and it is essential for a region to capitalise on the opportunities presented by digital media.

The data sources for this section include:

- Websites Traffic Analysis [www.alexa.com.au];
- Social Media Presence Analysis on Websites [Facebook, Twitter, Instagram, TripAdvisor and Youtube];
- User Search Behaviour Analysis on Terms [Data from Google Trend].

8.2. KEY FINDINGS

A review of the digital tourism assets of Nillumbik and region shows a very low level of traffic generated to Nillumbik and other destination websites in the region. This is the result of the way the websites are constructed in terms of their ability to drive traffic but also the quality and strength of the brand. The top search terms and trending search terms for Nillumbik have no link to tourism when compared with village destinations like St Andrews and Hurstbridge. The Yarra Valley and Mornington Peninsula as a benchmark clearly have a stronger tourism link to their brand with tourism references in both their top search listings and also in their trending searches.

Nillumbik as a destination brand may need to be reconsidered as it has little association with the population with tourism.

The social media cut presence whilst present is also limited in the region, with only twitter and facebook identified as sites utilized for Nillumbik. In addition Nillumbik Regional Tourism Association has only 55 followers on Facebook, lower than the townships of Diamond Creek, Eltham and Hurstbridge.

Moving forward a much improved digital presence will be essential to grow the presence of Nillumbik Shire in tourism. However revisiting the consumer brand of Nillumbik should also be considered as the search data shows it has very little association with tourism.

8.3. WEBSITES TRAFFIC ANALYSIS

The following are the key regional information and tourism websites relevant to promoting Nillumbik Shire:

- <http://www.ntatourism.com/>
- <http://hurstbridgevillage.com.au/>
- <http://www.diamondcreekshopping.com.au/>
- <http://www.elthamtown.com.au/>

Table 11 shows the global ranking of relevant tourism websites in Nillumbik (government websites cannot be ranked, therefore the Council website has been omitted).

Overall it is interesting to note that only Elthamtown has enough visits to achieve a ranking from Alexa. This highlights the low level of use of the websites as destination webpages.

The keyword item search shows that both Nillumbik and Hurstbridge have a stronger association with tourism searches such as Bed and Breakfasts, Historical Society and heritage trail. Due to the larger residential population base of Eltham and Diamond Creek the web searches for both locations are associated with general service and retail businesses.

TABLE 11 WEBSITE GLOBAL RANKING BY POPULARITY

Site	Global Ranking	Page Views Per Visitor	Top Keywords from Search Engine
ntatourism.com	Not Enough Data	Not Enough Data	Nillumbik - 53.20% St Andrews bed and breakfast - 8.65% heart and soul cafe Hurstbridge - 6.68% the Nillumbik historical societ- 5.01%
hurstbridgevillage.com.au	Not Enough Data	Not Enough Data	heart and soul cafe Hurstbridge - 44.88% Hurstbridge - 17.39% rhodes greek tavern - 12.219% Hurstbridge heritage trail - 9.25% Hurstbridge take away - 3.87%
diamondcreeks hopping.com.au	Not Enough Data	Not Enough Data	diamond creek - 96.51% pet shop diamond creek - 0.52% diamond creek Victoria business - 0.44% paw prints pet supplies - 0.34% paw prints pet supplies diamond creeks - 0.34%
elthamtown.com.au	8,583,656	3.00	Eltham - 71.98% discount - 22.57% online Shopping - 1.59% kamagra UK - 1.39% list Victoria Australia chamber of commerce - 1.26%





Source: www.alex.com.au

8.4. SOCIAL MEDIA PRESENCE

Over the past decade social media has emerged as a key visitor information source and market tool. As visitor engagement with the online world increases, it is important for destinations to improve the profile and brand strength through social media platforms. In addition, mobile digital platforms (smartphones and tablets) are increasingly being used by visitors whilst on holiday to gain information on destinations, and make decisions on where to visit.

The Nillumbik region currently has little presence on social media which represents a key gap in promoting the region. Table 12 lists the main tourism organisations and websites with their integration with social media.

TABLE 12 SOCIAL MEDIA SUMMARY

Organisation					
Nillumbik Shire Council (nillumbik.vic.gov.au)	No	1157 followers	952 followers	No	No
Nillumbik Tourism (ntatourism.com)	No	No	55 followers	No	No
Hurstbridge Village (hurstbridgevillage.com.au)	No	87 followers	979 followers	No	No
Diamond Creek (diamondcreeks hopping.com.au)	No	No	340 followers	No	No
Eltham Town (elthamtown.com.au)	No	No	2,317 followers	No	No

8.5. USER SEARCH BEHAVIOUR ON TERMS

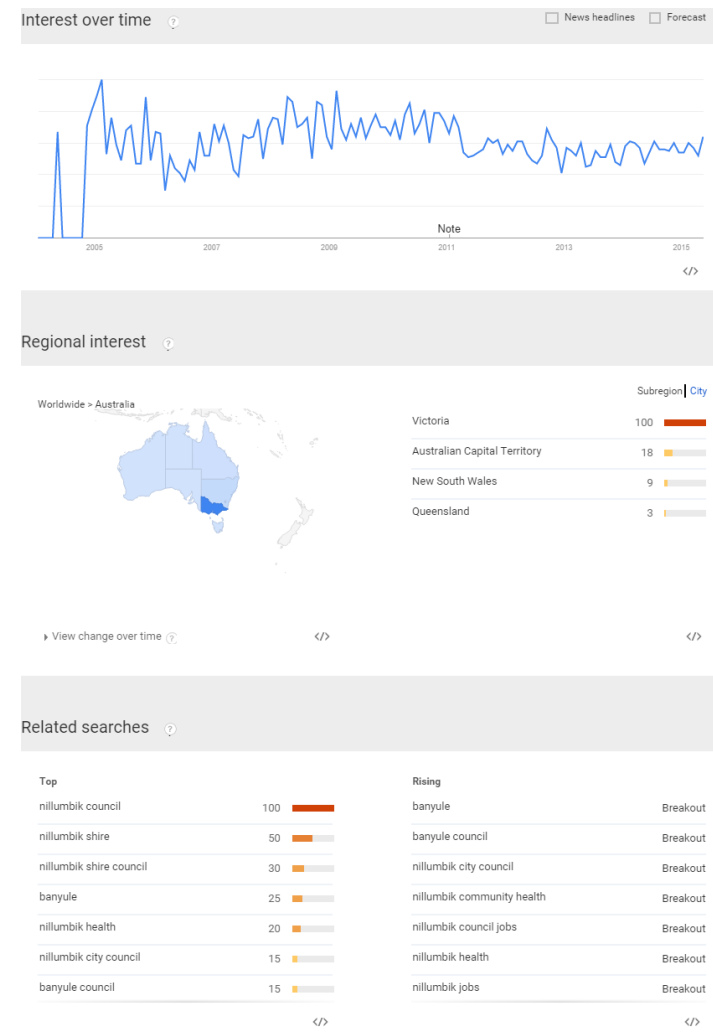
The following figures shows how often a particular search-term is entered relative to the total number of searches.

A review of search terms used shows the following:

- Nillumbik has had static interest overtime as a search term, Eltham, Hurstbridge and Diamond Creek have all had increases in searches over the past 5 years.
- Almost all of the search items for Nillumbik and its destinations are unrelated to tourism. The only tourism related terms recorded are Kangaroo Ground Winery, Wellers of Kangaroo Ground and St Andrews Market.

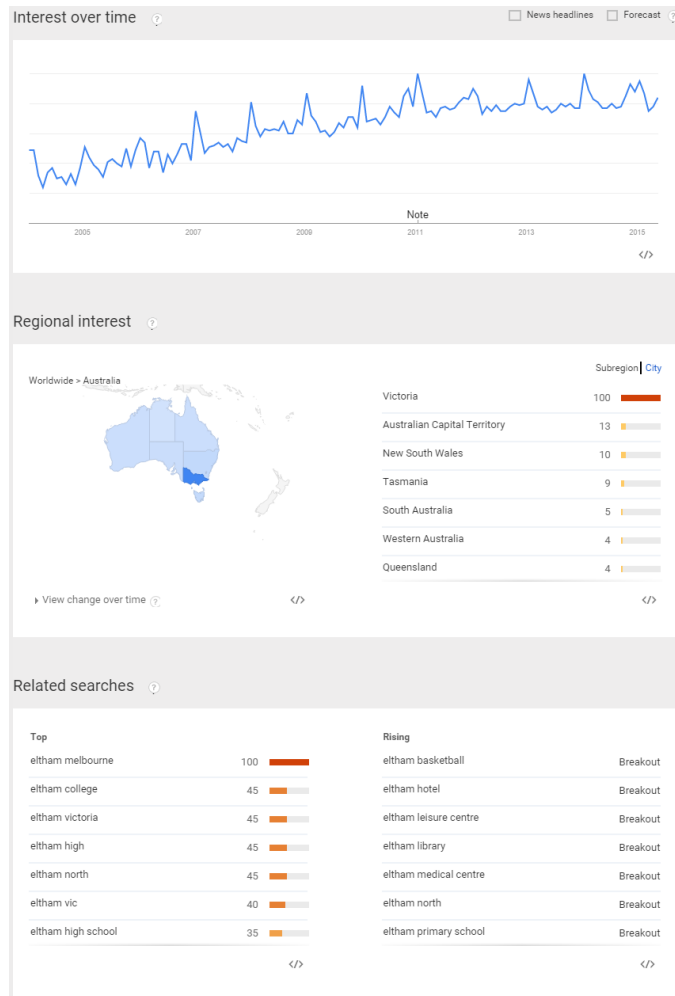
If the region had a strong tourism profile like other locations in Victoria such as the Yarra Valley you would see search profiles having a strong tourism relationship. Examples of the Yarra Valley and the Mornington Peninsula are provided as benchmarks.

FIGURE 24 NILLUMBİK USER SEARCH BEHAVIOUR ON TERMS



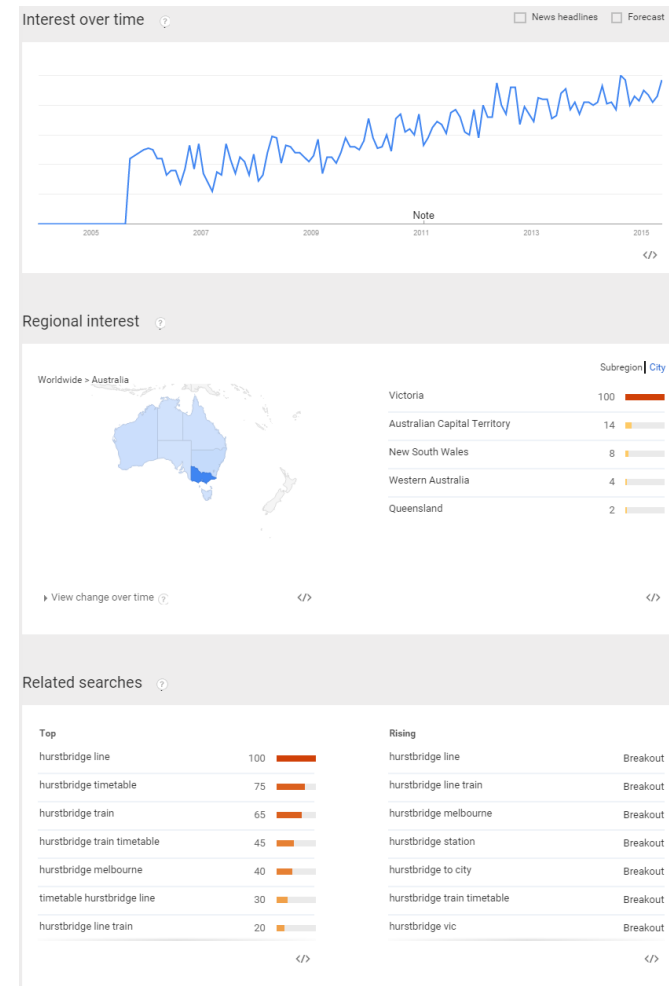
Source: Google Trend

FIGURE 25 ELTHAM USER SEARCH BEHAVIOUR ON TERMS



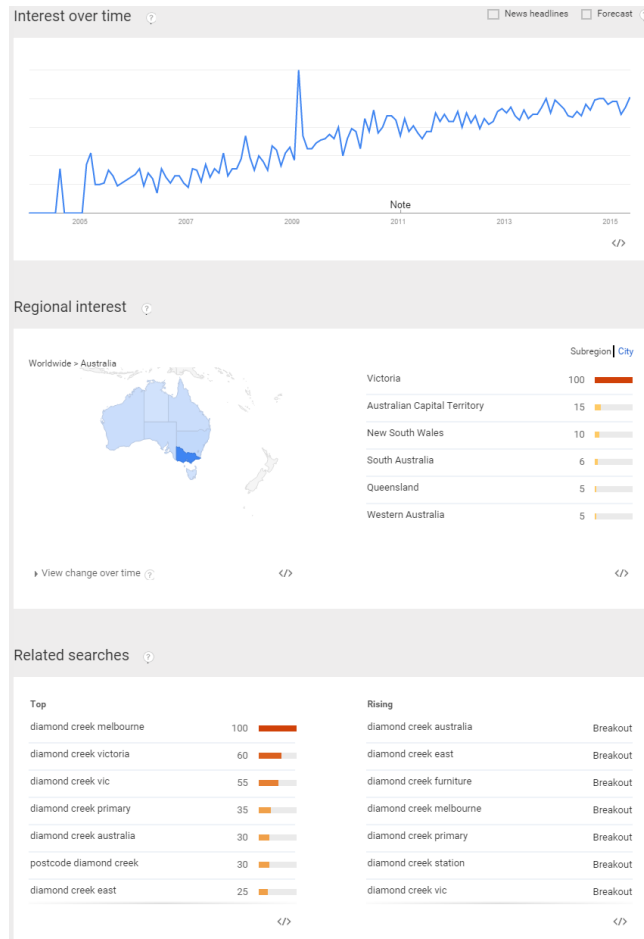
Source: Google Trend

FIGURE 26 HURSTBRIDGE USER SEARCH BEHAVIOUR ON TERMS



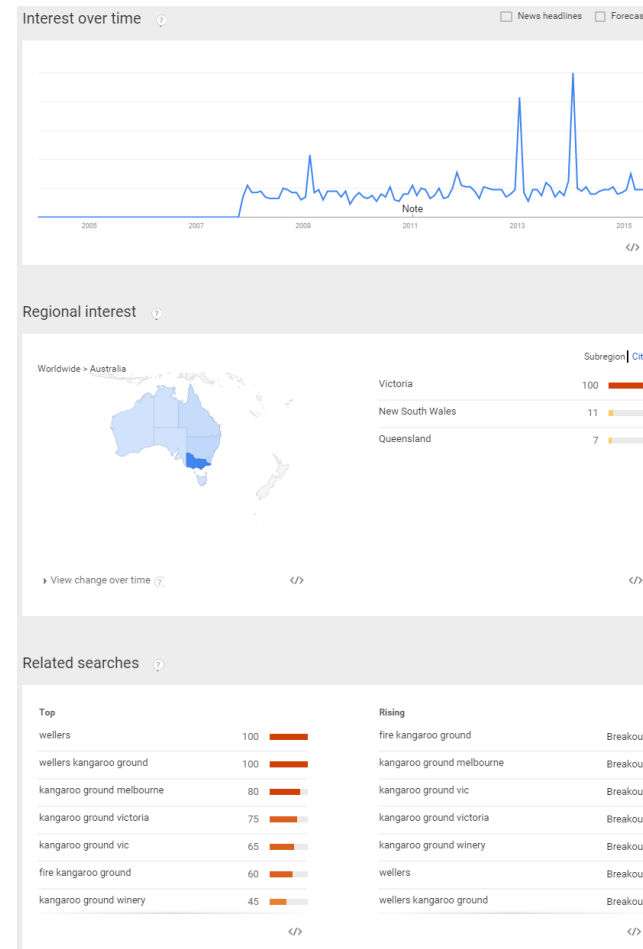
Source: Google Trend

FIGURE 27 DIAMOND CREEK USER SEARCH BEHAVIOUR ON TERMS



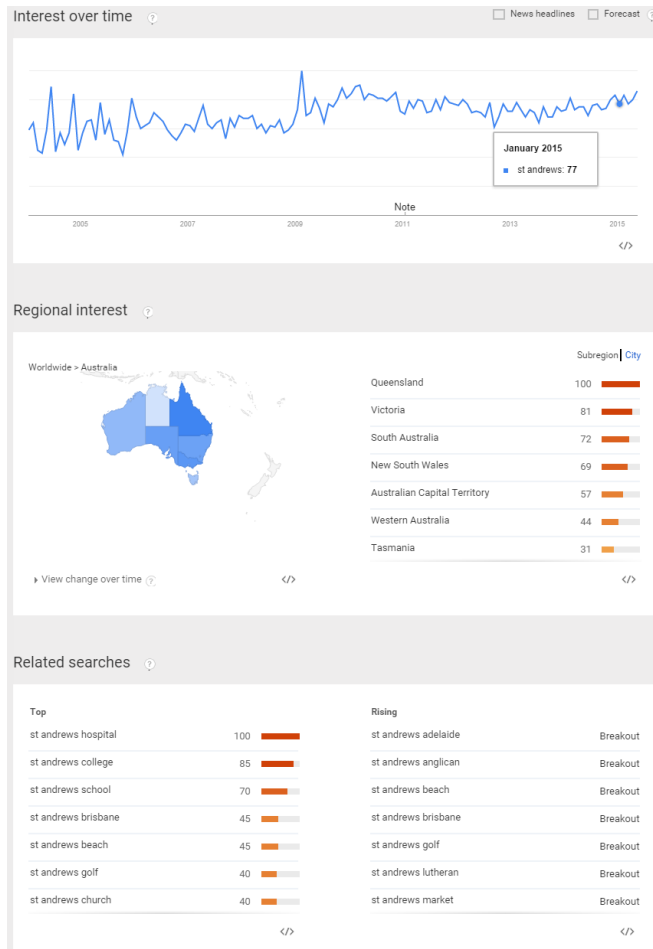
Source: Google Trend

FIGURE 28 KANGAROO GROUND USER SEARCH BEHAVIOUR ON TERMS



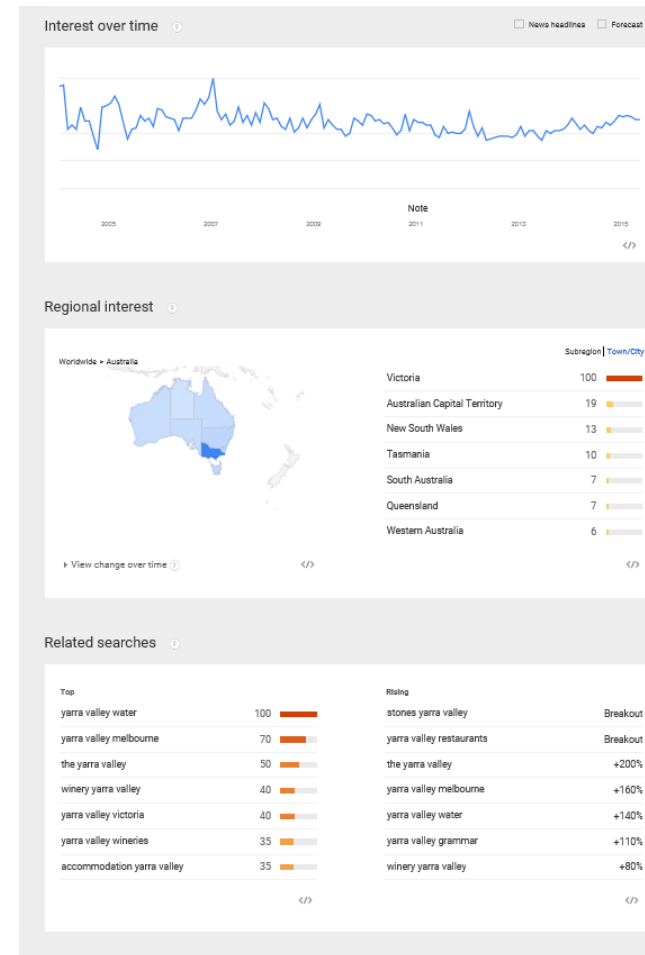
Source: Google Trend

FIGURE 29 ST ANDREWS USER SEARCH BEHAVIOUR ON TERMS



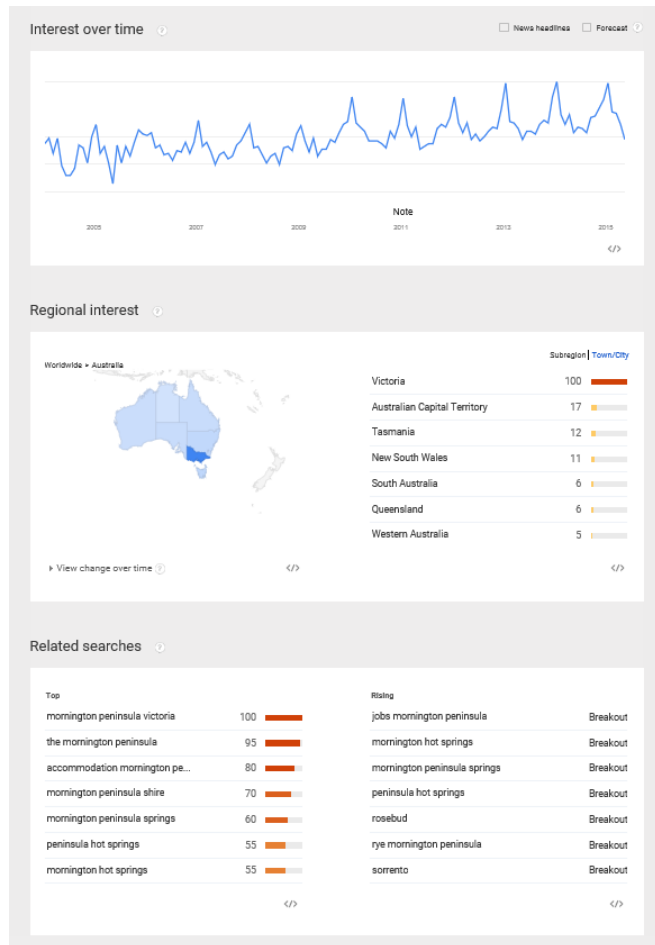
Source: Google Trend

FIGURE 30 YARRA VALLEY USER SEARCH BEHAVIOUR ON TERMS



Source: Google Trend

FIGURE 31 MORNINGTON PENINSULA SEARCH BEHAVIOUR



Source: Google Trend

9. DMP STRATEGIC FRAMEWORK

9.1. INTRODUCTION

This section provides a strategic framework for the development of tourism in Nillumbik. The key directions highlight the need to further develop and mature Nillumbik's existing product mix and look to attract investment in new tourism products.

In addition there is opportunity to further develop the professionalism of Nillumbik's tourism sector through the establishment of a regional approach to tourism which will provide scale and resources to assist growing the visitor economy.

The following strategic directions have been identified to address issues and opportunities identified during the destination management plan research and consultation phases. In particular the strategy addresses the following:

- Need to mature the industry;
- Opportunities to develop nature based tourism;
- Opportunities to extend and grow visitor yield through product and infrastructure development;
- Identification of product development opportunities matched to target market need;
- A tourism industry that balances the values of Nillumbik Shire's community values, the environment and the opportunity to leverage economic benefit from tourism.

9.2. KEY FINDINGS

The following are a summary of the key strategic directions for Nillumbik's visitor economy:

- Develop nature based tourism such as nature walks and mountain biking through investment in reserve infrastructure (including interpretation);
- Improve the cycling experience through improved awareness of the benefits of cycle tourism, business involvement and mapping and information;
- Invest in digital interpretation of heritage, cultural and environmental assets to improve the way visitors experience Nillumbik;
- Continue to develop equine tourism through trail investment;
- Continue to invest in shared use trails;
- Develop and work with festivals and events that leverage from Nillumbik's uniqueness;
- Build on the arts and cultural product through development of curated content and the packing of product;
- Improve the food and wine culture of Nillumbik through promotion of investment opportunities;
- Promote the need to invest in accommodation to support the tourism economy in Nillumbik, particularly the small functions/events market such as weddings.
- Improve and develop products suited to family experiences;
- Investigate the opportunity to establish a regional tourism body to improve the resources and maturity of the region's tourism industry;

- Continue to monitor the visitor economy in Nillumbik to make informed decisions.

9.3. PRODUCT DEVELOPMENT

This section outlines suggested projects, strategies and actions for the development of tourism product in the Nillumbik Shire.

9.3.1. NATURE BASED TOURISM

PLENTY GORGE PARKLAND NATURE BASED TOURISM DESTINATION

The Plenty Gorge Parkland, managed by Parks Victoria, is one of Melbourne's most extensive areas of remnant natural bushland. The parkland has been developed through many years of acquisition of private properties along the Plenty River.

The Plenty Gorge Parkland is categorised as "metropolitan" parkland which means the focus of its development and catchment is broader than servicing the local catchment.

The Parkland includes steep gorges, hill country, remnant bushland, lake systems, the Plenty River and its tributary creeks.

Discussions with the consultant preparing a masterplan for the parkland highlights opportunity to improve active recreation and adventure activities at parkland.

One of the key assets of the Parkland is the Yellow Gum Reserve which includes the Blue Lake in Plenty. This Reserve provides the setting for adventure development opportunities such as mountain biking, abseiling and rock-climbing, trail running and multi sports events.

The Plenty Gorge Parkland has many interpretive opportunities including indigenous heritage, early European settlement, wildlife, geology and mining history.

Further investment in infrastructure, signage and interpretation will provide product and experiences that will attract and improve the experience of existing visitors.

Specific considerations include:

- Formalisation of the extensive mountain bike trail network through signage and mapping, combined with trail redevelopment and improvement;

- Formalisation of rock climbing and abseiling sites, supported by information;
- Development of an outdoor adventure events calendar in collaboration with Local Government; and
- Improving walking trails and providing new signs for interpretation and wayfinding.

STRATEGY 1: ESTABLISH PLENTY GORGE PARKLAND AS A KEY NATURE BASED DESTINATION

Action 1.1: Meet with Parks Victoria managers to discuss ways of supporting the Metropolitan Parkland become a key Nature Based Destination

Action 1.2: Ensure future marketing material for Nillumbik Region reflects the various outdoor activities on offer in the Plenty Gorge Parkland

SMITHS GULLY/CHRISTMAS HILLS SHARED USE AREA

Smiths Gully is a popular mountain bike destination for locals.

The trail network, whilst well developed, has very limited available information for visitors and, although the directional signage has just been upgraded, there is no interpretive signage. The quality of the trail network is of a standard where it has the potential to attract a greater number of visitors. Improved parking, amenities, development of interpretive signage and mapping will make the trail network much more accessible to visitors.

STRATEGY 2: CONSIDER DEMANDS FOR A MOUNTAIN BIKE FACILITY IN THE SHIRE

Action 2.1: Monitor provision of mountain biking participation and facilities across the region to inform Council's role in future provision.

Action 2.2 Encourage Parks Victoria to upgrade trail infrastructure in their land adjoining Panton Hill reserves.

OFF ROAD TRAIL NETWORK

There is an extensive off road network which exists throughout Nillumbik, however there are still gaps in the trail network that can be improved through further investment

to implement the Trails Strategy priorities. East west links across the Shire are generally poor and there is an opportunity for the trail network to extend further into the rural areas such as Hurstbridge, Whittlesea and the Plenty Gorge Parklands. These trails will have consideration for equine recreation users, who are drawn to the area for trail riding, where appropriate.

Specific projects include:

- **Diamond Creek Trail** - Extend this trail from Diamond Creek to Hurstbridge;
- **Aqueduct Trail** - Determine development options for this trail following the establishment of land owner status, from Eltham to Christmas Hills;
- **Green Wedge Trail** - Formalise this trail which extends from Wattle Glen to Kinglake;
- **Kinglake Way** - Establish a trail from Hurstbridge to Arthurs Creek.

STRATEGY 3: CONTINUE TO INVEST IN THE SHARED USE TRAIL NETWORK IN NILLUMBIK

Action 3.1: Deliver priorities identified in Council's Recreation Trails Strategy 2011.

Action 3.2: Finalise the preparation of the Northern Region Trails Strategy, and seek to secure external funding to implement Nillumbik priorities.

CYCLE FRIENDLY NILLUMBIK

Nillumbik businesses could cater for cyclists more proficiently, which may lead to greater levels of local expenditure. A bike friendly business program could be developed which provides business owners with tips of how to capture this market, particularly cafes. This includes:

- Outdoor seating;
- Complimentary track pump provided;
- Bike stand and repair area;
- Spare tubes and other basic equipment for sale;
- Dedicated cycle parking area;
- Cyclist friendly accommodation;

Printed and electronic maps on Nillumbik's cycling trails are available and popular among the community. Macedon Ranges Shire Council has recently developed an app and brochure to promote various cycling routes through the Shire including mountain bike trails and road cycling routes. This provides an excellent example of what Nillumbik could develop to further promote and grow its own network to visitors. Linking the Trail Network through Strava, GPS cycling application will provide information on cycling loops that cyclists can test themselves against.

STRATEGY 4: WORK WITH BUSINESSES IN NILLUMBIK TO BETTER SUPPORT CYCLE TOURISM

Action 4.1: Prepare a guide and information sheet that promotes the advantages of supporting cycle tourism and tips on how better to cater for cyclist needs. This may be targeted to food, beverage and accommodation businesses.

STRATEGY 5: ESTABLISH QUALITY CYCLING COLLATERAL AND INFORMATION FOR CYCLING ROUTES

Action 5.1: Continue to support the Council-appointed Recreation Trails Advisory Committee to monitor the use of cycling routes and destinations of regional interest.

Action 5.2 Engage a graphic designer to map routes and information in an online and hard copy brochure with links to Strava GPS program.

Action 5.3 Advocate to VicRoads for improved road safety supporting on-road cycling.

BUSHLAND RESERVES GUIDE

It is understood that Nillumbik Shire are developing a bushland reserve guide. This guide (including an app and website) will help promote the extensive network of bushland reserves throughout Nillumbik.

STRATEGY 6: DELIVER BUSHLAND RESERVE GUIDE

YARRAMBAT GOLF COURSE - UNIQUE WILDLIFE GOLFING EXPERIENCE

The Yarrambat Golf Course provides a unique golfing experience with an opportunity to see wildlife such as kangaroos on the golf course. This experience has the

opportunity to be further capitalised upon, with potential for golfing and wildlife viewing tours, and could appeal to a wider visitor market.

STRATEGY 7: DEVELOP DAY PACKAGES FOR YARRAMBAT GOLF COURSE FOR INTERNATIONAL VISITORS INCLUDING LUNCH

Action 7.1: Discuss with golf course management opportunities to package the Yarrambat Golf Course for international visitors.

EQUINE STRATEGY

There is great opportunity to grow the recreational equine sector, particularly trail riding and events. Nillumbik is well placed to capture this market, being close to Melbourne, with large amounts of open space and trails. Key opportunities that should be explored include:

- Large indoor equestrian centre for event hosting;
- Mapping of equine trails and equine facilities (pony clubs, equestrian clubs etc); and
- Establishment of equine friendly accommodation.

The Kinglake Equestrian Centre Feasibility Study, 2012, undertaken by Urban Enterprise in 2012, highlights a distinct lack of indoor equestrian facilities in the region which could host large events.

STRATEGY 8: INVESTIGATE FUTURE EQUESTRIAN RECREATION OPPORTUNITIES AND PROMOTE TRAILS

Action 8.1: Investigate the demand for an additional equestrian facility in Nillumbik.

Action 8.2: Map existing trail networks and prepare collateral.

9.3.2. ARTS, CULTURE AND HERITAGE

HERITAGE AND CULTURAL TRAILS

Nillumbik Shire has a rich indigenous history with many indigenous cultural heritage sites throughout the municipality. Development of cultural interpretation along existing creek and river trail networks will strengthen the appreciation of the indigenous history and add a layer of experience to walking and cycling through the municipality.

This may also be used by school groups to explore local history as part of their curriculum.

STRATEGY 9: ESTABLISH HERITAGE TRAILS AND INTERPRETATION IN DIGITAL FORMAT

Action 9.1: Establish a heritage advisory group.

Action 9.2: Establish locations and information to be compiled into heritage trails, utilising the knowledge of historical societies.

Action 9.3: Establish a digital portal and application which can be used by visitors, the community and school groups. This should be georeferenced so that it can be used in the field.

Action 9.4: Deliver indigenous cultural interpretation and trails throughout the Shire, including the Bunji Interpretation Trail, and interpretation at Kangaroo Ground tower and along the Gowra Trail.

ARTS PACKAGING

There are numerous arts attractions such as Montsalvat which are the primary motivator for visitors. Consultation however reveals that these visitors do not experience much of the other product available in the municipality. There is opportunity to package arts and cultural attractions with a winery visit and restaurant to contribute to an increase the length of stay and broader experiences in Nillumbik Shire.

This packaging of product would suit the affluent Lifestyle Leaders market segment, whom have a high discretionary income and a desire to escape the urban life to discover new experiences.

STRATEGY 10: PACKAGE ARTS PRODUCTS WITH OTHER EXPERIENCES

Action 10.1: Approach operators to identify those willing to be involved with packaging of product with visits to Montsalvat and other art attractions to grow dispersal.

DIAMOND CREEK ARTS INSTALLATION

The Diamond Creek Traders Association has plans to strengthen the arts and cultural experience of the village with contemporary art installations. This will help align Diamond Creek to broader arts and cultural product strength of Nillumbik, and improve Diamond Creek's sense of place.

The art installation may be expanded as part of the proposed Diamond Creek - Hurstbridge shared trail to create a unique trail user experience which leads trail users into town.

STRATEGY 11: CREATE A CONTEMPORARY ARTS INSTALLATION IN DIAMOND CREEK

Action 11.1: Investigate grant funding opportunities for contemporary arts installation in Diamond Creek and along the Diamond Creek Trail.

LEVERAGING OFF NILLUMBIK'S CONTEMPORARY ARCHITECTURE AND MUDBRICK HERITAGE

Nillumbik has the largest concentration of mudbrick buildings in Australia.

There is opportunity to leverage further from the mudbrick heritage of the area by exploring opportunities to have displays and workshops available about mudbrick and other sustainable forms of architecture.

STRATEGY 12: ESTABLISH A PERMANENT MUDBRICK EXHIBIT TO ATTRACT AND PROMOTE VISITORS INTERESTING IN MUDBRICK BUILDINGS

Action 12.1: Establish a permanent exhibit at Edendale with information on the history and sustainable nature of mudbrick complimented by mudbrick construction workshops.

9.3.3. AGRITOURISM & WINERIES

Projects listed in this section have been developed in guidance from Economy Actions listed in the Green Wedge Management Plan, namely:

- 6.1 Investigate the best ways in which to provide an advisory service to farmers on business opportunities and to farms and major land owners on land use and land management;
- 6.2 Explore options to support growth of locally based food production;
- 7.1 Investigate and implement opportunities to support new, economically viable agricultural opportunities in the Green Wedge;
- 7.2 Advocate to the Victorian Government for support for agricultural enterprises;
- 7.3 Investigate funding for development of a brand and marketing strategy aimed at attracting growers and visitors to the region.

FARMGATE OPPORTUNITIES IN NILLUMBIK

Nillumbik, being a green wedge Shire has protected its agricultural production, making it one of the closest agricultural areas to Melbourne. Areas such as Kangaroo Ground and Strathewan continue to host small scale agricultural production including various forms of horticulture such as olives, stone fruit and apples. Farmgate activities in these areas should be further investigated and promoted. A priority of the Green Wedge Management Plan Implementation Advisory Committee of investigating models of eco- and agri-tourism opportunities supports this. Examples of tourism opportunities could include:

- A cidery at Strathewan;
- Olive farm gate experience at Kangaroo Ground; and
- Berry and fruit picking.

STRATEGY 13: GROW FARMGATE TOURISM IN NILLUMBIK

Action 13.1: Undertake a training and awareness program for farm and hobby farm owners wishing to establish farm gate. This will include sharing information on:

- *Best practice farmgate;*
- *Planning considerations;*
- *Markets;*
- *Branding; and*
- *Financial sustainability.*

DEVELOPMENT OF DESTINATION DINING ESTABLISHMENTS

The food experience in the Nillumbik Shire is limited and there are very few highly regarded dining establishments that have the potential to draw visitors for a destination dining experience. An example is the type of dining establishments that are located on the Mornington Peninsula such as *Montalto* and *10 minutes by Tractor*.

STRATEGY 14: PROMOTE A GOOD FOOD CULTURE IN NILLUMBIK

Action 14.1: Prepare a tourism development prospectus highlighting the investment opportunities in the region including dining.

LOCAL FOOD CONNECT PROGRAM EXPANSION

The Local Food Connect program provides the following initiatives:

- Encourages home and community food growing.
- Facilitates food swaps.
- Encourages and supports local food enterprises.
- Supports local markets that offer opportunities for local growers and producers.
- Encourages school and community gardens.
- Facilitates education and workshops on food growing and production.
- Initiates and encourages participation in local food events.

The program is useful in trying to improve the local food culture of Nillumbik, particularly in local produce uses and food events. The Nillumbik Shire tourism industry should support and leverage from the success of this organisation.

STRATEGY 15: SUPPORT THE LOCAL FOOD CONNECT PROGRAM

Action 15.1 Nillumbik Tourism to become involved, promote and support programs that will assist in the development of the food industry in Nillumbik.

CELLAR DOOR EXPERIENCES – MEET THE MAKER

Nillumbik has a large number of boutique wineries throughout the municipality. The winery setting differs greatly from that of the Yarra Valley which is more focused on mass tourism. Nillumbik Shire should develop and promote its meet the maker winery experience as a point of difference.

The interesting bush setting of the wineries of Nillumbik also create a uniquely Australian wine setting.

The digital presence is quite poor of Nillumbik wineries as a collective and distinct group.

STRATEGY 16: PROMOTE THE UNIQUENESS OF THE WINERY PRODUCT IN NILLUMBIK

Action 16 Improve the digital presence of Nillumbik's wineries through a high quality dedicated webpage that defines the uniqueness of the offer. This will promote the programs and events offered. This should also link to the new branding being developed for Nillumbik Tourism.

9.3.4. ACCOMMODATION

CAMP GROUND AND RV FACILITY

There is opportunity to consider camping in the Hurstbridge region and possibly in other areas within Nillumbik. The camping could allow for cycle touring visitors to stop in the Hurstbridge region on their way north or whilst touring through the broader region.

STRATEGY 17: INVESTIGATE THE POTENTIAL FOR CAMPING AND RV PARKING IN THE SHIRE

Action 17.1: Undertake a feasibility study which identifies suitable sites for camping and the services required to support camping and RV parking.

FARMSTAY ACCOMMODATION

Nillumbik Shire has a vast amount of farmland in close proximity to Melbourne. This presents opportunity for short weekend escapes for Melbournians or potentially for international visitors. Nillumbik can offer a farm experience within 40 minutes of Melbourne.

Nillumbik should support growth in farmstay accommodation to promote the experience of the green wedge and provide revenue opportunities for existing green wedge property owners.

STRATEGY 18: PROMOTE FARM STAY INVESTMENT

Action 18.1: Include farm stay opportunities in an investment prospectus

Action 18.2: Undertake a training and awareness program for farm and hobby farm owners wishing to establish farm stays.

ACCOMMODATION DEVELOPMENT AT KEY ATTRACTIONS

There is likely to be limited demand for a large scale standalone accommodation facility in Nillumbik. However there is opportunity for existing attractions such as Edendale to develop accommodation suited to their target markets.

STRATEGY 19: PROMOTE ACCOMMODATION AT ATTRACTIONS

Action 19.1: Include accommodation opportunities at attractions in an investment prospectus

HOTEL AND CONFERENCE CENTRE

There is no large scale accommodation within Nillumbik which can support large groups. Given Nillumbik's proximity to Melbourne, complimentary product such as wineries and nature based tourism, there is opportunity for a hotel and conference

centre facility. This will most likely require a dedicated site as the Green Wedge Zone is unlikely to accommodate such a facility within its policy and there is limited opportunity within Commercial Zones in Nillumbik.

It is unlikely that a large hotel would have enough demand to be viable on its own; however a complex such as Lindenderry at Red Hill would be able to generate internal demand from functions and events.

STRATEGY 20: PROMOTE INVESTMENT IN A HOTEL AND CONFERENCE CENTRE.

Action 20.1: Investigate where such a facility can be located

Action 20.2: Include the investment opportunity within a prospectus.

9.3.5. FAMILY PRODUCT

FUTURE REINVESTMENT OF DIAMOND VALLEY MINIATURE RAILWAY

The Diamond Valley Miniature Railway forms part of the Eltham Lower Park and is Nillumbik's most visited paid attraction with approximately 140,000 tickets sold each year. They have publicised plans to expand their operations by creating a large extension to the railway allowing for greater capacity on their Sunday operation day and promoting return visits. With their current opening hours, car parking facilities and track length, the Diamond Valley Railway is nearing capacity. Council should work with the committee to ensure it remains a premium tourism attraction in line with the principles of the adopted 2008 Eltham Lower Park Masterplan.

STRATEGY 21: CONTINUE TO SUPPORT THE DIAMOND VALLEY RAILWAY AS A PREMIUM TOURISM ATTRACTION

Action 21.1: Work with the Committee of the Diamond Valley Railway and other stakeholders to ensure it remains a premium tourism attraction within their existing leased area and in line with the principles of the adopted 2008 Eltham Lower Park Masterplan.

EXPANSION OF EDENDALE ATTRACTION

Edendale is a popular venue for families, educational groups, and also a great venue for weddings and small events. The addition of a café and function centre with undercover seating would greatly enhance the product offering at Edendale.

STRATEGY 22: CONTINUE TO INVEST AND DEVELOP EDENDALE AS A PRIMARY VISITOR ATTRACTION IN NILLUMBIK

Action 22.1 Continue to improve and invest in Edendale to support and grow the small events, family and educational visitor market. Consider the development of 'earth-building heritage' products and/or a Function Centre when the Strategic Business Plan is reviewed.

Action 22.2 Seek funding to support investment.

9.3.6. EVENTS

WEDDINGS & FUNCTIONS PLANNING GUIDE

There is opportunity to jointly promote the Nillumbik Shire's wedding and events venues through a consolidated planners guide. This guide will assist in growing the awareness of event and function venues and aim to maintain and grow the functions and weddings sector.

Mornington Peninsula Tourism provides a strong example of a wedding planners guide.

There are many unique event spaces in Nillumbik that could leverage off improved promotion.

STRATEGY 23: DEVELOP A WEDDINGS AND SOCIAL EVENT FUNCTION CENTRE PLANNERS GUIDE

Action 23.1: Liaise with various venues in Nillumbik to establish interest in the development of a coordinated events and planners guide for Nillumbik.

REVIEW OF EVENTS FUNDING CRITERIA

Nillumbik Shire provides significant funding to events. Many of these events are targeted towards the community. There is opportunity to investigate the establishment

of special grant program that supports further provision of those events which are targeted more broadly and generate awareness to Nillumbik, attract visitors and align with the tourism brand.

STRATEGY 24: UNDERTAKE A REVIEW OF EVENTS

Action 24.1: Undertake a thorough review of events funding provided by Nillumbik Shire with the aim to provide funding to events that can demonstrate a strong link with the Nillumbik brand, bring target markets to the region and grow the profile of Nillumbik.

Action 24.2: Review annual calendar of events and investigate new events that are needed to attract target markets and existing events which can be expanded.

Action 24.3: Investigate the potential of expanding the mudbrick tour into a wider event that incorporates displays, corporate sponsors and competitions.

9.4. ORGANISATION AND DELIVERY

9.4.1. TOURISM ORGANISATION

CREATION OF A NEW REGIONAL TOURISM ORGANISATION WITH SURROUNDING COUNCILS

The Nillumbik Tourism Association operates with very few resources and it will be difficult to establish a tourism organisation in Nillumbik that would be sustainable without extensive levels of funding from Council. In addition the number of true tourism businesses that bring in greater than 50% of their trade from outside of the Shire would be limited.

There are surrounding Councils such as Whittlesea and Manningham that share product with Nillumbik such as the Plenty Gorge corridor in the case of Whittlesea and the green wedge in Manningham.

Inclusion of surrounding municipalities in a tourism association should be considered. This would assist in sharing the cost of the administration of the association and strengthening the product.

All of the existing regional tourism associations that have had long term sustainability in Victoria include at least two Local Government Areas.

STRATEGY 25: INVESTIGATE THE ESTABLISHMENT OF A NORTH EAST MELBOURNE REGIONAL TOURISM ASSOCIATION.

Action 25.1 Building on the “The Artisan Hills” brand, approach Manningham, Banyule and City of Whittlesea to identify level of interest in establishing a Melbourne North East Tourism Association.

9.4.2. BRAND

BRAND

Research from Google Trends shows that Nillumbik has little or no association with tourism in the broader consumer market. It is recommended that Nillumbik Shire explore alternative ways to market the region.

STRATEGY 26: IMPLEMENT THE BROADER ADOPTION OF THE ARTISAN HILLS BRAND WITH DESTINATIONS PROMOTED UNDER THIS BRAND

9.4.3. VISITOR INFORMATION

VISITOR INFORMATION AT ATTRACTIONS

There are opportunities to provide improved visitor information at attractions to strengthen dispersal of visitors in Nillumbik. This is particularly important at locations that have high levels of visitation such as the Miniature Railway and Montsalvat.

This can be delivered in many different ways such as volunteer visitor information services staff, digital screens or hard copy collateral.

STRATEGY 27. UNDERTAKE A VISITOR INFORMATION REVIEW WHICH IDENTIFIES A COST EFFECTIVE APPROACH FOR VISITOR INFORMATION SERVICES, COLLATERAL AND INFORMATION DISTRIBUTION.

Action 27.1: Appoint a qualified consultant to provide a strategic framework for visitor information services building on the product audits and visitor research identified in the Destination Management Plan.

9.4.4. DIGITAL

DIGITAL PLATFORM

The web presence of Nillumbik and the surrounding region needs improvement. The web is now the number one information source for visitors and also provides a strong motivator for visitation. Nillumbik needs to improve its web presence to align with target markets’ use of online platforms.

STRATEGY 28: REVIEW AND IMPLEMENT A NEW DIGITAL PLATFORM FOR NILLUMBIK AND ITS DESTINATIONS

Action 28.1: Develop a high quality website suitable for computers and mobile devices which is motivational and informative.

9.4.5. RESEARCH

ONGOING RESEARCH

Consultation with businesses highlights that there are very few businesses which track where their customers are coming from. This makes it very difficult to develop effective marketing strategies for industry. Promoting the value of tracking customers should be explored in Nillumbik.

STRATEGY 29: CONTINUE TO MONITOR THE TOURISM INDUSTRY

Action 29.1: Undertake ongoing research to track and monitor the visitor economy in Nillumbik:

- *Annual primary business research which tracks industry performance, investment and trends;*
- *Bi annual primary visitor research.*

10. ACTION PLAN

STRATEGY	ACTIONS	TIMEFRAME	RESPONSIBILITY	ESTIMATED COST
STRATEGY 1: ESTABLISH PLENTY GORGE PARKLAND AS A KEY NATURE BASED DESTINATION	<p>Action 1.1: Meet with Parks Victoria managers to discuss ways of supporting the Metropolitan Parkland become a key Nature Based Destination</p> <p>Action 1.2: Ensure future marketing material for Nillumbik Region reflects the various outdoor activities on offer in the Plenty Gorge Parkland</p>	YEAR 1/ ONGOING	Parks Victoria, Nillumbik Shire to provide support	N/A
STRATEGY 2: CONSIDER DEMANDS FOR A MOUNTAIN BIKE FACILITY IN THE SHIRE	<p>Action 2.1: Monitor provision of mountain biking participation and facilities across the region to inform Council's role in future provision.</p> <p>Action 2.2: Encourage parks Victoria to upgrade trail infrastructure in their land adjoining Panton Hill reserves.</p>	YEAR 2 / ONGOING	Nillumbik Shire, Smith Gully Mountain Bike Mountain Bike Club, Parks Victoria, Recreational Trails Advisory Committee	\$40K for Masterplan
STRATEGY 3: CONTINUE TO INVEST IN THE SHARED USE TRAIL NETWORK IN NILLUMBIK	<p>Action 3.1: Deliver priorities identified in Council's Recreation Trails Strategy 2011.</p> <p>Action 3.2: Finalise the preparation of the Northern Region Trails Strategy, and seek to secure external funding to implement Nillumbik priorities.</p>	YEAR 1/ ONGOING	Nillumbik Shire	Significant capital investment over time
STRATEGY 4: WORK WITH BUSINESSES IN NILLUMBIK TO BETTER SUPPORT CYCLE TOURISM	<p>Action 4.1: Prepare a guide and information sheet that promotes the advantages of supporting cycle tourism and tips on how better to cater for cyclist needs. This may be targeted to food, beverage and accommodation businesses.</p>	YEAR 2/ 3	Recreational Trails Advisory Committee / Nillumbik Shire	\$3K
STRATEGY 5: ESTABLISH QUALITY CYCLING COLLATERAL AND INFORMATION FOR CYCLING ROUTES	<p>Action 5.1: Continue to support the Council-appointed Recreation Trails Advisory Committee to monitor the use of cycling routes and destinations of regional interest.</p> <p>Action 5.2 Engage a graphic designer to map routes and information in an online and hard copy brochure with links to Strava GPS program.</p> <p>Action 5.3 Advocate to VicRoads for improved road safety supporting on-road cycling.</p>	<p>YEAR 1</p> <p>YEAR 2</p>	Nillumbik Shire/ Recreational Trails Advisory Committee	\$5K

STRATEGY	ACTIONS	TIMEFRAME	RESPONSIBILITY	ESTIMATED COST
STRATEGY 6: DELIVER BUSHLAND RESERVE GUIDE		Year 2	Nillumbik Shire	
STRATEGY 7: DEVELOP DAY PACKAGES FOR YARRAMBAT GOLF COURSE FOR INTERNATIONAL VISITORS INCLUDING LUNCH	Action 7.1: Discuss with golf course management opportunities to package the Yarrambat Golf Course for international visitors.	YEAR 1	Nillumbik Shire\Nillumbik Tourism Association	N/A / In kind
STRATEGY 8: INVESTIGATE FUTURE EQUINE RECREATION OPPORTUNITIES AND PROMOTE TRAILS	Action 8.1: Investigate the demand for an additional equestrian facility in Nillumbik. Action 8.2: Map existing trail networks and prepare collateral.	YEAR 1 YEAR 2/3 YEAR 3	Nillumbik Shire/ Recreational Trails Advisory Committee	\$60K
STRATEGY 9: ESTABLISH HERITAGE TRAILS AND INTERPRETATION IN DIGITAL FORMAT	Action 9.1: Establish a heritage advisory group. Action 9.2: Establish locations and information to be compiled into heritage trails, utilising the knowledge of historical societies. Action 9.3. Establish a digital portal and application which can be used by visitors, the community and school groups. This should be georeferenced so that it can be used in the field. Action 9.4. Deliver indigenous cultural interpretation and trails throughout the Shire, including the Bunji Interpretation Trail, and interpretation at the Kangaroo Ground Tower and along the Gowra Trail	YEAR 2 YEAR 2/3 YEAR 3+ YEAR 2+	Heritage Advisory Group / Nillumbik Shire	\$35K-\$50K [In conjunction with Strategy 16 & 28)
STRATEGY 10: PACKAGE ARTS PRODUCTS WITH OTHER EXPERIENCES	Action 10.1: Approach operators to identify those willing to be involved with packaging of product with visits to Montsalvat and other art attractions to grow dispersal.	YEAR 1	Nillumbik Shire / Nillumbik Tourism Association	N/A

STRATEGY	ACTIONS	TIMEFRAME	RESPONSIBILITY	ESTIMATED COST
STRATEGY 11: CREATE A CONTEMPORARY ARTS INSTALLATION IN DIAMOND CREEK	Action 11.1: Investigate grant funding opportunities for arts installations in Diamond Creek and along the Diamond Creek Trail.	YEAR 2	Nillumbik Shire/ Diamond Creek Traders / Arts Victoria	N/A
STRATEGY 12: ESTABLISH A PERMEANT MUDBRICK EXHIBIT TO ATTRACT AND PROMOTE VISITORS INTERESTING IN MUDBRICK BUILDINGS	Action 12.1: Establish a permanent exhibit at Edendale with information on the history and sustainable nature of mudbrick complimented by mudbrick construction workshops	YEAR 2	Nillumbik Mudbrick Association / Nillumbik Shire	\$5K / In-Kind
STRATEGY 13: GROW FARMGATE TOURISM IN NILLUMBIK	Action 13.1: Undertake a training and awareness program for farm and hobby farm owners wishing to establish farm gate. This will include sharing information on: <ul style="list-style-type: none"> • Best practice farmgate • Planning considerations; • Markets; • Branding; and • Financial sustainability. 	YEAR 2 + 3	Nillumbik Shire / Food Connect	\$5K
STRATEGY 14: PROMOTE A GOOD FOOD CULTURE IN NILLUMBIK	Action 14.1: Prepare a tourism development prospectus highlighting the investment opportunities in the region including dining.	YEAR 2	Nillumbik Shire	\$5 for graphic design
STRATEGY 15: SUPPORT THE LOCAL FOOD CONNECT PROGRAM	Action 15.1 Nillumbik tourism to become involved, promote and support programs that will assist in the development of the food industry in Nillumbik.	YEAR 3	Local Food Connect / Nillumbik Shire	
STRATEGY 16: PROMOTE THE UNIQUENESS OF THE WINERY PRODUCT IN NILLUMBIK	Action 16.1 Improve the digital presence of Nillumbik's wineries through a high quality dedicated webpage that defines the uniqueness of the offer. This will promote the programs and events offered. This should also link to the new branding being developed for Nillumbik Tourism.	YEAR 2	Nillumbik Shire/ Nillumbik Tourism Association	\$10K [in conjunction with Strategy 9 & 28

STRATEGY	ACTIONS	TIMEFRAME	RESPONSIBILITY	ESTIMATED COST
STRATEGY 17: INVESTIGATE THE POTENTIAL FOR CAMPING AND RV PARKING IN THE SHIRE	Action 17.1: Undertake a feasibility study which identifies visitor demand and suitable sites for camping and the services required to support camping and RV parking.	YEAR 2+	Nillumbik Tourism Association / Hurstbridge Traders Association	\$20K
STRATEGY 18: PROMOTE FARM STAY INVESTMENT	Action 18.1: Include farm stay opportunities in an investment prospectus Action 18.2: Undertake a training and awareness program for farm and hobby farm owners wishing to establish farm stays.	YEAR 2+ YEAR 2+	Nillumbik Shire	\$5k
STRATEGY 19: PROMOTE ACCOMMODATION AT ATTRACTIONS	Action 19.1: Include accommodation opportunities at attractions in an investment prospectus	YEAR 3	Nillumbik Shire	(See strategy 18)
STRATEGY 20: PROMOTE INVESTMENT IN A HOTEL AND CONFERENCE CENTRE.	Action 20.1: Investigate where such a facility can be located Action 20.2: Include the investment opportunity within a prospectus.	YEAR 3	Nillumbik Shire Strategic Planning Unit	\$25K
STRATEGY 21: CONTINUE TO SUPPORT THE DIAMOND VALLEY RAILWAY AS A PREMIUM TOURISM ATTRACTION	Action 21.1: Work with the Committee of the Diamond Valley Railway and other stakeholders to ensure it remains a premium tourism attraction within their leased area and in line with the principles of the adopted 2008 Eltham Lower Park Masterplan.	YEAR 1/2	Nillumbik Shire/ Diamond Valley Railway	\$5,000
STRATEGY 22: CONTINUE TO INVEST AND DEVELOP EDENDALE AS A PRIMARY VISITOR ATTRACTION IN NILLUMBIK	Action 22.1 Continue to improve and invest in Edendale to support and grow the small events, family and educational visitor market. Consider the development of 'earth-building heritage' products and/or a Function Centre when the Strategic Business Plan is reviewed. Action 22.2 Seek funding to support investment.	YEAR 1/2	Nillumbik Shire	\$30K for Masterplan and Business Plan
STRATEGY 23: DEVELOP A WEDDINGS AND SOCIAL EVENT FUNCTION CENTRE PLANNERS GUIDE	Action 23.1: Liaise with various venues in Nillumbik to establish interest in the development of a coordinated events and planners guide for Nillumbik.	YEAR 2	Nillumbik Shire, Nillumbik Tourism Association	N/A

STRATEGY	ACTIONS	TIMEFRAME	RESPONSIBILITY	ESTIMATED COST
<p>STRATEGY 24: UNDERTAKE A REVIEW OF EVENTS</p>	<p>Action 24.1: Undertake a thorough external review of events funding provided by Nillumbik Shire with the aim to provide funding to events that can demonstrate a strong link with the Nillumbik brand, bring target markets to the region and grow the profile of Nillumbik.</p> <p>Action 24.2: Review annual calendar of events and investigate new events that are needed to attract target markets and existing events which can be expanded.</p> <p>Action 24.3: Investigate the potential of expanding the mudbrick tour into a wider event that incorporates displays, corporate sponsors and competitions.</p>	<p>YEAR 1</p> <p>YEAR 1/2</p> <p>YEAR 2</p>	<p>Nillumbik Shire</p>	<p>\$20K for events review</p>

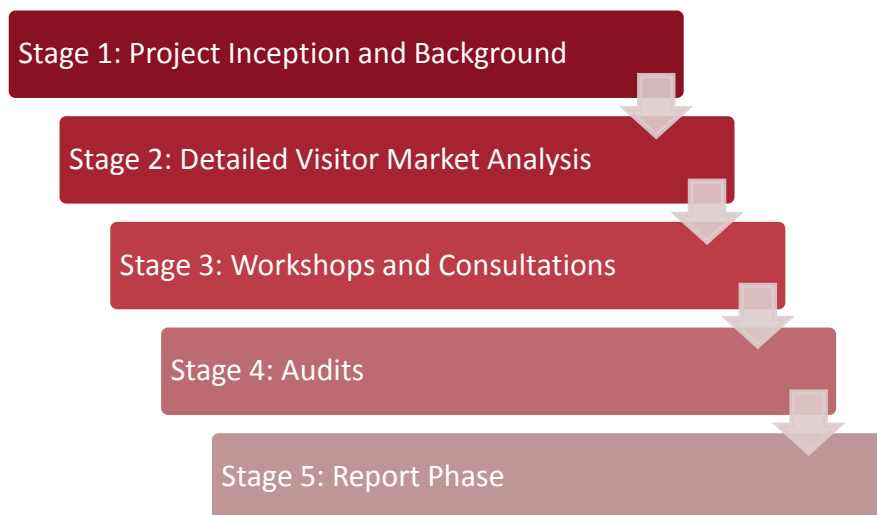
STRATEGY	ACTIONS	TIMEFRAME	RESPONSIBILITY	ESTIMATED COST
STRATEGY 25: INVESTIGATE THE ESTABLISHMENT OF A NORTH EAST MELBOURNE REGIONAL TOURISM ASSOCIATION.	Action 25.1 Building on the “The Artisan Hills” brand, approach Manningham, Banyule and City of Whittlesea to identify level of interest in establishing a Melbourne North East Tourism Association.	YEAR 1	Nillumbik Shire / Nillumbik Tourism Association	N/A
STRATEGY 26: IMPLEMENT THE BROADER ADOPTION OF THE ARTISAN HILLS BRAND WITH DESTINATIONS PROMOTED UNDER THIS BRAND		YEAR 1	Nillumbik Shire / Nillumbik Tourism Association	
STRATEGY 27: UNDERTAKE A VISITOR INFORMATION REVIEW WHICH IDENTIFIES A COST EFFECTIVE APPROACH FOR VISITOR INFORMATION SERVICES, COLLATERAL AND INFORMATION DISTRIBUTION.	Action 27.1: Appoint a qualified consultant to provide a strategic framework for visitor information services building on the product audits and visitor research identified in the Destination Management Plan	YEAR 1	Nillumbik Shire	\$20K
STRATEGY 28: REVIEW AND IMPLEMENT A NEW DIGITAL PLATFORM FOR NILLUMBIK AND ITS DESTINATIONS	Action 28.1: Develop a high quality website suitable for computers and mobile devices which is motivational and informative.	YEAR 2	Nillumbik Shire/ Nillumbik Tourism Association	\$35K [In conjunction with Strategy 16 & 9)
STRATEGY 29: CONTINUE TO MONITOR THE TOURISM INDUSTRY	Action 29.1: Undertake ongoing research to track and monitor the visitor economy in Nillumbik: Annual primary business research which tracks industry performance, investment and trends Bi annual primary visitor research.	ONGOING	Nillumbik Shire	\$10K per annum

APPENDICES

Appendix A METHODOLOGY

OVERVIEW

Urban Enterprise undertook the Nillumbik Destination Management Plan project in five stages:



MILESTONE 1 PROJECT COMMENCEMENT

STAGE 1 PROJECT INCEPTION AND BACKGROUND

1. **Inception meeting.** An inception meeting was conducted with the Marketing Committee/client with the key purpose of agreeing on the scope of works, workshop strategy, milestone dates and workplan. This meeting was undertaken at the Nillumbik Shire Council offices.
2. **Prepare a workshop strategy.** A workshop strategy should be prepared for agreement, for an initial workshop with approx. 40

people (including key tourism operators and potential investors), and for secondary workshop with 10 people.

3. **Literature review.** A literature review was prepared analysing information relevant to the study to ensure that the project is supported by State, Federal and Local Government policy and also available research, with a focus on identifying product, infrastructure and experience development priorities for the region.

STAGE 2: DETAILED VISITOR MARKET ANALYSIS

4. **Visitation data analysis and review.** This review examined levels of visitation, visitation trends, and visitor yield and expenditure, as well as a tourism and tourism-related businesses in the Nillumbik Shire. This helped present a picture of tourism in the Nillumbik region, from which, the infrastructure and product needs could be determined. Urban Enterprise utilised custom access to the National and International Visitor Survey.
5. **Identifications of target markets** for the region was based on the assessment of current research, and via consultations.

MILESTONE 2: COMPLETION OF MARKET RESEARCH

STAGE 3 CONSULTATION

6. **Stakeholder workshop.** Workshop undertaken with council officers, held at the Nillumbik Shire Council offices.
7. **Stakeholder Meetings.** Urban Enterprise will met with tourism operators, business organisations and event organisers to discuss opportunities and constraints facing businesses.

STAGE 4 AUDITS

8. **Product Audit.** A full product audit was compiled for the Nillumbik Shire. This drew on existing inventories of product provided by VIC's

and tourism organisations. The product audit included an assessment of tourism product and infrastructure across the region, broken into categories of investment:

- Accommodation
- Nature based
- Heritage
- Tours and activities
- Attractions
- Food
- Wine
- Golf
- Enabling infrastructure;
- Others

The product audit included both a quantitative and qualitative assessment of product and infrastructure. Urban Enterprise will seek to use the GIS databases from council if possible. The product audit will be summarised by subregional destinations.

9. **Audit of tourism concepts and proposals.** Drawing on the consultation with Local Government, State Government, industry and a review of existing literature an audit of tourism investments and concepts would be undertaken. This will include a database and a description of projects. Where necessary, further follow up conversations will be undertaken with project proponents.
10. **Product and experience gap analysis.** A gap analysis for tourism product, infrastructure and experiences will be undertaken. This will match tourism product and experience provision with the needs of the target markets identified.
11. **Analysis of Social Media.** Review and analysis of social media site information, including Trip Advisor, Urban Spoon to inform visitor experience review.
12. **Audit of Council Resources & Governance** Urban Enterprise will review Council's resources dedicated tourism to understand the constraints for delivery of the tourism strategy. This information will

be utilised when preparing an action plan for council's tourism strategy. An analysis of the current governance structures will also be undertaken including both internal to Council relevant to tourism and relationships with the tourism industry and other regional partners.

13. **Issues and opportunities paper prepared.** An issues and opportunities paper was prepared outlining the outcomes of the study to date. This highlighted areas of need and product, experience and infrastructure gaps and potential projects for consideration.
14. **Issues and opportunities paper presented.** An issues and opportunities paper was presented to the Steering Committee for discussion and feedback.

MILESTONE 3: ISSUES AND OPPORTUNITIES REPORT

STAGE 5 REPORT PHASE

15. **Preparation of draft report.** A draft Strategy Report was prepared. This incorporated outcomes of each phase and provide clear recommendations for moving forward including profiles for priority projects.

MILESTONE 4: DRAFT REPORT

16. **Prepare final report.** The preparation of this report would take in feedback from the Marketing Committee.

MILESTONE 5: FINAL REPORT

Appendix B CONSULTATION

Consultation for the Nillumbik Destination Management Plan included stakeholder workshops involving council staff from various departments, and one on one meetings and conversations with tourism operators, business groups and event organisers.

Consultation included discussions relating to the following:

- Testing findings from research and data analysis;
- Presenting the results of the product audit to ensure that it captures the region's tourism offer and the assessment of quality;
- Markets and marketing;
- Identifying skills and training gaps for workforce development to support the tourism industry;
- What visitor experiences are unique and integral to tourism in the region;
- Identifying opportunities for tourism investment;
- Opportunities for and barriers to growth in the region's tourism industry;
- Developing an understanding of the effectiveness and roles of tourism organisations; and
- Local perceptions of the importance of tourism.

Stakeholder workshops. Two workshops were undertaken to inform the study, these included:

Nillumbik Shire Officers Workshop. An internal workshop with a broad range of Council personnel to assist in identifying key opportunities and existing Council initiatives;

Tourism Marketing Committee Workshop. Workshop with a broad range of tourism stakeholders including tourism industry representatives, business associations and Nillumbik Shire councillors and personnel. The draft ideas were presented with feedback provided from key tourism stakeholders.

Stakeholder meetings. Urban Enterprise met with tourism operators, business organisations and event organisers to discuss opportunities and constraints facing businesses. The following stakeholders were consulted:

- Nillumbik Mudbrick Association;
- Nillumbik Tourism Association;
- Montsalvat, Eltham;
- The Little Organic Shop, Hurstbridge;
- Diamond Creek Traders Association;
- Wattle Festival;
- Eltham Jazz Festival;
- Diamond Valley Railway Inc;
- Mercer's Restaurant, Eltham;
- Lovegrove Vineyard and Winery, Cottles Bridge;
- Wine and Food Lover's Tours;
- Eltham South Fine Art: Studio and Gallery;
- Eltham Motor Inn;
- Eltham Chamber of Commerce and Industry;
- HM Leisure Planning (for Plenty Gorge Masterplan).