West Gippsland

Quick Wins Mini Destination Marketing Plan & *Food Tourism Strategy*

DECEMBER 2021

West Gippsland
PROGRESS ASSOC

This Quick Wins Mini Destination Marketing Plan & Food Tourism Strategy was prepared by TRC Tourism for West Gippsland Progress Association (WGPA) (with the support of Cardinia Shire Council).

The WGPA sincerely thank all contributors for sharing their valuable time and opinions to assist in progressing these economic bushfire recovery efforts and supporting future tourism and visitor economy planning.

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ACKNOWLEDGEMENT

We acknowledge that West Gippsland is located on the traditional lands of the Bunurong/Boon Wurrung People and pay our respects to their culture; and to their Elders – past, present and emerging.

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Contents

Executive Summary

West Gippsland is within proximity to a significant domestic market in Victoria looking for day trips and experiences, and possesses both existing and emerging food tourism assets (such as farm gates, local produce, cellar doors, regenerative agriculture practices, and other food-related businesses). As a result, West Gippsland and the railway towns of Nar Nar Goon, Garfield, Tynong and Bunyip, are well-positioned to develop an attractive visitor experience focused on the food tourism theme.

West Gippsland Progress Association are a representative voice for lobbying and developing initiatives that support local farmers and small businesses. There is a significant opportunity to capitalise on current bushfire recovery support as well as utilising this 'West Gippsland Quick Wins Mini Destination Marketing Plan & Food Tourism Strategy.'

This Strategy will help WGPA to positively improve businesses and growing food tourism opportunities in the peri-urban farming area of West Gippsland, and provide a strong foundation for future long-term tourism planning and development.

From the Bunyip Complex Bushfires of March 2019, the surrounding community representatives came together and initiated the forming of the West Gippsland Progress Association to support the growth and prosperity of local farmers and small businesses.

The primary focus: creating achievable plans for the Bunyip Ward of Cardinia Shire over the 2022 – 2024 timeframe, in Food – Tourism, Sustainable Regenerative Agriculture and small business/farmer mentoring and development.

We look forward to implementing this strategy for the benefit of our community.

Barry Crees – Chair, West Gippsland Progress Association

"Traditionally thought of as being simply farm stays and winery visits, the term agritourism now encompasses a wide variety of activities where agriculture and tourism intersect. Essentially, 'agritourism' is the act of going to a region to visit a farm or food-related business (including restaurants, markets/events, produce outlets and natural attractions) for enjoyment, education, or to participate in activities and events."

Australian Regional Tourism

1 Introduction

The West Gippsland Progress Association (WGPA) recently formed to support farmers and local businesses affected by the devastating Bunyip Complex bushfires. 15,000 hectares of Bunyip State Park and properties south of the park from Tynong North in the west through to Tonimbuk in the east were consumed by the bushfire in March 2019. [1] In 2020, local industry working groups defined opportunities that would progress economic bushfire recovery efforts for the Bunyip Complex bushfires impacted business community in the next two years and beyond.

Two West Gippsland initiatives were identified for further development:

- A quick win's mini destination marketing plan; and
- A food tourism strategy.

With the full support of Cardinia Shire Council (CSC), the WGPA has developed the 'West Gippsland Quick Wins Mini Destination Marketing Plan & Food Tourism Strategy' (the Strategy).

Given the devastation of the Bunyip Complex bushfires of 2019 and the impacts of COVID-19 on local businesses, the goal of the Strategy is to positively improve businesses and grow food tourism opportunities in this peri-urban farming area and provide a strong foundation for future long-term tourism planning and development. Peri-urban areas form belts of non-urban land fringing metropolitan centres, and usually contain important natural resources, remnant biodiversity and significant landscapes. These areas are also under increasing threat from development and overuse.[2]

Efforts by the WGPA to strengthen and promote West Gippsland's unique identity and visitor experiences to support productive land to grow local industries will also help contribute to building a prosperous economy – a focus area of the *Cardinia Shire Council Plan 2021–25.*

With current COVID-19 disruptions impacting the movements of interstate and international visitors, the Melbourne day visitor market is the immediate focus in the short-term to provide meaningful impact for the community. The Strategy aims to identify the most viable food tourism products and experiences to promote to the high-value Melbourne day tripper visitor market.

Despite its proximity to Melbourne residents, the region is underrepresented in food tourism experiences when compared to other similar Victorian destinations. Based on the findings of this project there are significant opportunities for the WGPA to further develop food tourism – building on the *CSC Community Food Strategy 2018–26*, Cardinia Food Movement and Food Circles Collective Impact Project, and recent Bushfire Economic Recovery Industry Project workshops – to support local producers and grow the visitor economy.

[1] Victorian Landcare Magazine - Winter 2020, Issue 78

[2] Peri-urban Region Research Group (RMIT University) https://www.rmit.edu.au/about/schools-colleges/global-urban-and-social-studies/research/research-centres-and-groups/periurban-region-research-group (Viewed 13 Dec 2021)

The prioritised actions in this report are realistic and achievable, and have been developed through industry, local businesses, government, and community input. Staged implementation of prioritised projects will result in targeted use of resources and funding and lay the foundations for developing and delivering an attractive visitor experience which can be promoted to interstate and international visitor markets when possible to do so.

Project scope

As development of the Strategy by WGPA is in direct response to the Bunyip Complex bushfires recovery program, the project area has been defined as Bunyip Ward which includes the following townships within Cardinia Shire:[3]

- Bunyip
- Bunyip North
- Garfield
- Garfield North
- Maryknoll
- Nar Nar Goon
- Nar Nar Goon North
- Pakenham (part of)
- Tonimbuk
- Tynong
- Tynong North.

Therefore, for the purpose of the Strategy any reference to 'West Gippsland' throughout this document relates to these boundaries of Bunyip Ward, and recommendations have been tailored accordingly.

The term 'West Gippsland' also reflects development of the Strategy being a WGPA led initiative.

However, given that peri-urban farming, emerging regenerative agriculture, and current and potential food tourism assets exist across the entirety of the region, and that future planning, development and management of tourism and strengthening the visitor economy falls under the responsibility of Council's Economic Development Department, it has been essential to consider this broader remit in forming the Strategy recommendations and their legacy impacts.

With this context in mind, and to ensure the prioritisation of economic recovery efforts from the Bunyip Complex bushfires, some recommendations for West Gippsland should be approached in the short-term by the WGPA as pilot initiatives, with the opportunity to consider broadening these to Shire-wide initiatives with the support of the Shire in the medium to longer term to ensure their success.

[3] Cardinia Shire Wards (viewed 17 Nov 2021) www.cardinia.vic.gov.au and as per comms with CS (13 Dec 2021)

Methodology

The Strategy was developed between late Sep 2021 and mid Dec 2021 through the processes of:

- Background research and analysis
- Consultation (group online discussions, one-on-one interviews by telephone and video conferencing, completion of questionnaires)
- Survey (hosted on Council's Creating Cardinia website)
- Site visit to Bunyip Ward to personally experience current food tourism products and visitor experiences.

Insights which have informed development of the Strategy have been provided by:

- Steering Group (consisting of WGPA members and Council staff)
- Community
- Local businesses
- Tourism industry
- Government officials
- Traditional Owners
- WGPA members
- Councillors
- Council staff.

Due to COVID-19 restrictions in place at the time of development of the Strategy, the ability to travel to the region and hold in-person workshops or interviews with stakeholders, was impacted. Although undertaking consultation remotely may have had some effect on the engagement outcomes, overall, the WGPA are confident that a wide selection of stakeholders has had the opportunity to contribute meaningful input.

Further details on the stakeholders and types of consultation undertaken can be found in Appendix A.

2 Regional context

Cardinia Shire

Cardinia Shire (CS) is approximately 55 kilometres from the Melbourne CBD, with an estimated resident population of 116,193 and covering a land area of 1,281 square kilometres.[4] It is part of Melbourne's food bowl[5] and is located within the Southern Ranges Green Wedge, one of 12 non-urban areas of metropolitan Melbourne that lie outside the Urban Growth Boundary, containing a mix of agriculture and low-density activities.[6] CS is one of the fastest growing regions in Australia[7], with the population projected to grow to approximately 200,000 people by 2041.[8] The region is a major part of the Mornington Peninsula and Western Port Biosphere Reserve; one of four internationally-recognised, UNESCO Biosphere reserves in Victoria facing the environmental challenge of human activity co-existing with nature.[9]

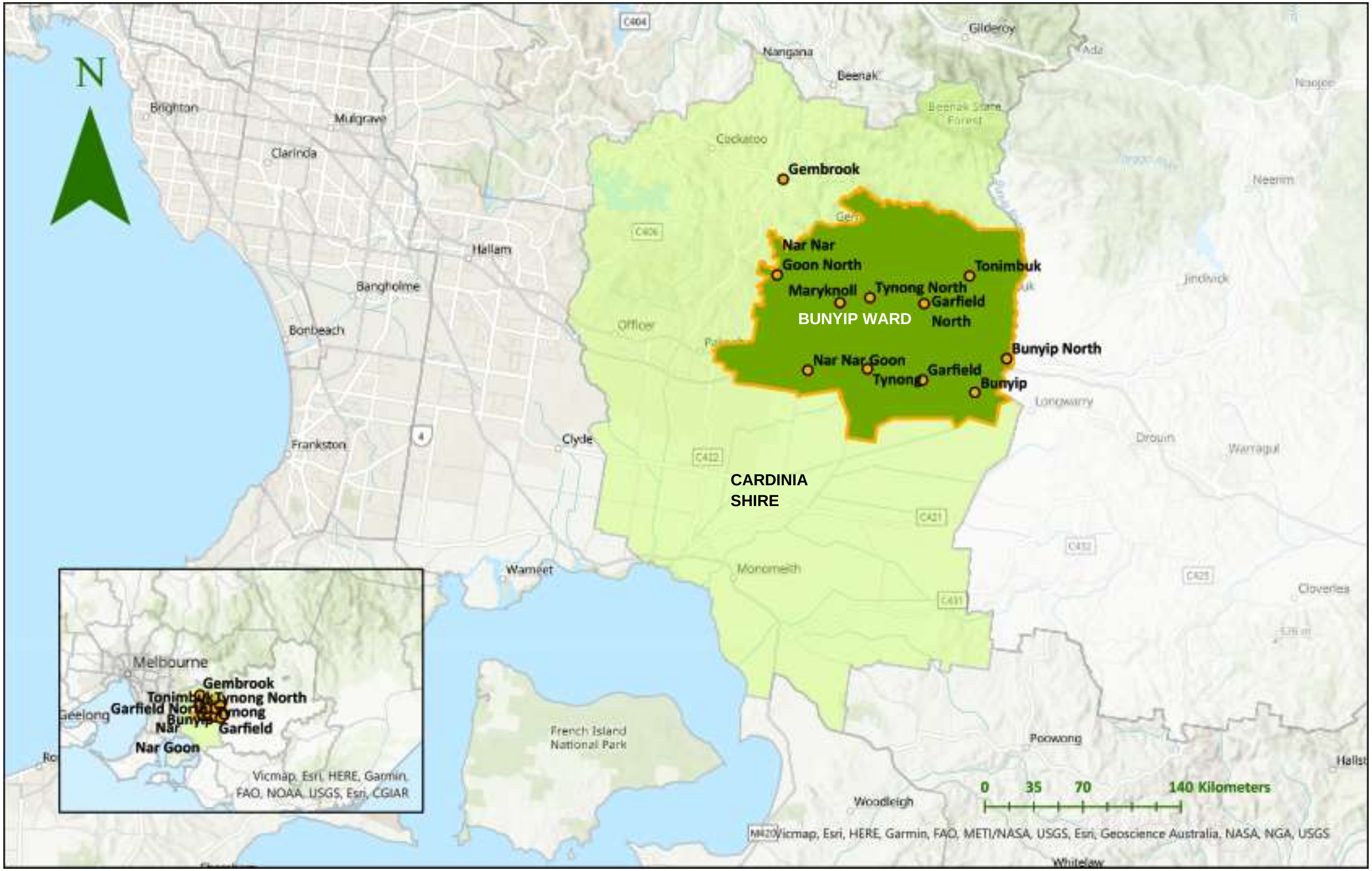
Bounded by the shires of Yarra Ranges to the north, Baw Baw to the east, South Gippsland – Bass Coast – Western Port to the south, and City of Casey to the west[10], CS is approximately a one-hour drive from Melbourne (with some parts accessible in less than one hour). Access by road includes using the Monash Freeway, Eastlink, Princes Highway or South Gippsland Hwy as well as the scenic local road networks.

Public Transport Victoria has regular trains and buses on the Metropolitan line to Pakenham and run regularly to train stations at Beaconsfield, Officer, Cardinia Road & Pakenham. V/Line train and coach services include stops at the railway towns of Nar Nar Goon, Garfield, Tynong and Bunyip. Public transport connections to Emerald, Gembrook and Kooweerup can also be made at Pakenham.

Although some visitors do travel to the region to enjoy the rural scenery and country hospitality, due to its proximity on the south-eastern fringe of the Melbourne metropolitan area the region is also a thoroughfare enroute to the Mornington Peninsula, Phillip Island or Gippsland rather than being the destination itself.

[4] https://profile.id.com.au/cardinia/ (Viewed 04 Oct 2021)
[5] Cardinia Shire Council Community Food Strategy 2018 – 26
[6] https://www.planning.vic.gov.au/policy-and-strategy/green-wedges
[7] https://www.cardinia.vic.gov.au/ (Viewed 18 Nov 2021)
[8] https://forecast.id.com.au/cardinia/ (Viewed 18 Nov 2021)
[9] https://portphillipwesternport.rcs.vic.gov.au/ (Viewed 18 Nov 2021)
[10] https://www.cardinia.vic.gov.au/info/20007/your_shire_and_council/301/facts_and_statistics_about_cardinia_shire (Viewed 04 Oct 2021)

Figure 1. Location map



Setting

West Gippsland features hills, backroads, bushland, vineyards, open farmland and the railway towns of Nar Nar Goon, Tynong, Garfield and Bunyip which contribute to the economic vitality of this rural area.[11] The distance between each of these railway towns is only around four to six kilometres, with the distance from Nar Nar Goon in the west and Bunyip to the east only around 13 kilometres in total, or a 15-minute drive. Whilst the majority of Bunyip State Park is in the neighbouring Ranges Ward, this important nature-based asset also borders and falls within the northern section of Bunyip Ward.

Industry

Agriculture, forestry and fishing employs 9% of workers in CS, significantly higher than that across Victoria (2.5%). Accommodation and food services (the closest category relating to tourism) employs 6.6% of workers in the Shire.[12]

Information from the recent 2020-21 Agricultural Census undertaken by the Australian Bureau of Statistics is expected to be released from mid-2022. However, this targets agricultural businesses above a minimum threshold of $40,000 in Estimated Value of Agricultural Operations, resulting in small-scale producers not being taken into consideration and the true value of agricultural production in some regions (like Cardinia Shire) not being fully understood.

[11] https://creating.cardinia.vic.gov.au/cardinia-shire-railway-towns Viewed (05 Oct 2021)
[12] https://economy.id.com.au/cardinia/employment-by-industry (Viewed 04 Oct 2021)

In 2015/16 (the previous Agricultural Census), the total value of agricultural output in CS was $290 million. The largest commodity produced was Livestock slaughtering, accounting for 35.9% of CS's total agricultural output in value terms. Vegetables were the next highest commodity produced at 23%.[13]

Visitor economy – tourism

As data from Tourism Research Australia is based on a four-year average from 2016 to 2019, this is the most accurate reflection of the state of the visitor economy within the region before the impact of the Bunyip Complex bushfires and COVID-19 disruption. Data at the Bunyip Ward level is not available.

Based on the average, the key annual tourism statistics for CS are:

- 916,000 total visitors (765,000 domestic daytrips: 140,000 domestic overnight: 12,000 international)
- 744,000 total nights (324,000 domestic overnight: 420,000 international)
- $87 million expenditure ($46 million domestic day trip - $27 million domestic overnight - $14 million international)
- $60 average spend per domestic daytrip and $191 average spend per domestic overnight
- $82 average spend per night on commercial accommodation by domestic overnight visitors.

[13] https://economy.id.com.au/cardinia/value-of-agriculture (Viewed 18 Nov 2021)

Visitor economy – agritourism

Australian Regional Tourism reports that approximately 1.8 million domestic and international tourists visited Australian farms in 2015-16, growing up until that point in time by approximately 9% year on year, and the sector is deemed to be worth approximately $9.4 billion per annum.[14]

In the year ending June 2019:[15]

- Approximately 321,000 domestic overnight visitors in Australia went to farmgates, generating expenditure of $230 million
- Approximately 383,000 domestic daytrip visitors in Australia went to farmgates, generating expenditure of $52 million
- Approximately 1,671,000 domestic overnight visitors in Australia went to farms, generating expenditure of $747 million
- Approximately 1,840,000 domestic daytrip visitors in Australia went to farms, generating expenditure of $156 million.

Supporting industry and visitor economy detail is provided in Appendix B.

[14] https://regionaltourism.com.au/projects/agritourism/

[15] Tourism Research Australia Visit Farmgates (2016 onwards) & Tourism Research Australia Visit Farms (Stopover Reason)

Melbourne's food bowl

The majority of agricultural production that feeds Melbourne's population takes place on the outskirts of the city and beyond.[16] However, protecting farmland is not enough for farms to thrive on the Melbourne's city fringe. Strengthening links between cities and farms is key to improving farmer livelihoods and the viability of farming on the fringe. Research by the Foodprint Melbourne project shows that opportunities are emerging to strengthen farm viability in Melbourne's foodbowl, driven by a growing consumer interest in sourcing locally grown foods, new opportunities for agri-tourism and direct sales and increasing demand for ethical, sustainably-produced foods from smaller scale producers [17] The proximity of city fringe farms to Melbourne also enables relationships and experiences to be created that can educate consumers about their food and the challenges of farming.

An infographic which showcases the mutually beneficial relationships that can be developed between cities and the farmers on their fringes can be found in Appendix C.

[16] The economic contribution of Melbourne's foodbowl A report for the Foodprint Melbourne project, University of Melbourne July 2016 (Deloitte Access Economics)

[17] Food For Thought: Challenges And Opportunities For Farming In Melbourne's Foodbowl A Foodprint Melbourne Report July 2018 (Lord Mayor's Charitable Foundation and the University of Melbourne)

Strategic alignment

Epicurean experiences have been identified in the *Victorian Visitor Economy Recovery and Reform Plan April 2021* as a sustainable competitive strength for Victoria, providing a significant opportunity for growth by attracting more visitors and encouraging them to spend more.[18]

As part of the Bushfire Economic Recovery Industry Project, two key workshops facilitated by the Farming Together Program from Southern Cross University were undertaken that identified two proposed food tourism projects:

1) growing/establishing an accredited farmers market(s) to contribute to tourism; and

2) a locavore lunch/dinner.[19]

Development of the Strategy aligns with several community and economic CSC goals:

- Growing a vibrant local food economy which supports growers and enables people to access locally produced food; through increased access points for food, promotion of local fresh product, and connecting local food producers to each other and the broader community.[20]
- Strengthening and promoting the region's unique identity and visitor attractions to support productive land and employment land, growing local industries and contributing to a prosperous economy.[21]
- The creation of jobs and economic growth through tourism and agritourism contributing to the long-term goal of reducing the financial vulnerability of the local community.[22]
- Although outdated and in need of a refresh, the *Bunyip State Park Management Plan* recognises the tourism and recreational values of experiencing a sense of remoteness relatively close to Melbourne, opportunities for recreational pursuits, and opportunities to enhance visitor experiences. Improving infrastructure, access points and interpretation to enhance visitor enjoyment is one of the major management directions. [23]
- As a longer-term view and building from a strong domestic visitor economy being established, WGPA and CSC could look to expand on at least two of Tourism Australia's key thematic appeals and experience categories for international visitors; food and wine, and natural beauty as well as leverage Tourism Research Australia's domestic visitor profiles that describe who visitors are and what they want to do.
- Future tourism planning also has the opportunity to involve the local Aboriginal people in the success and growth of CSC's visitor offering and working with the local Aboriginal community identifying places, songlines and spaces that are of significance to local Aboriginal people, Traditional Owners and organisations.[24]

[18] Victorian Visitor Economy Recovery and Reform Plan: April 2021 (Victorian Government)
[19] Putting West Gippsland On The Map (Farming Together)
[20] CS Community Food Strategy 2018–26
[21] CS Council Plan 2021-25
[22] CS Liveability Plan 2017–29
[23] Bunyip State Park Management Plan 2007
[24] CS Reconciliation Action Plan 2015–19

Previous governance and initiatives

Casey Cardinia Visitation Strategy 2017-2020

CSC and the City of Casey Economic Development teams previously formalised their collaboration towards developing the Casey Cardinia region as a visitor destination through the development and adoption of the *Casey Cardinia Visitation Strategy 2017-2020*. The Strategy made a number of recommendations surrounding regional products and experiences, customer service, events, industry support, collaborative partnerships and governance and policy. A separate marketing plan also addressed recommendations surrounding research, brand, visitor information, and collaborative partnerships. It is unclear which recommendations were successfully implemented.

This relationship has since been dissolved and moving forward the responsibility for tourism and the visitor economy across the region will fall under the remit of the Economic Development Department at CSC.

Gourmet Deli Trail

The Gourmet Deli Trail was an initiative in place over 10 years ago throughout the region (and neighbouring LGAs) which included cellar doors, farm gates and producers. Signage was installed and marketing materials such as flyers were created. Anecdotally, it has been indicated that the trail slowly dissolved due to some of the businesses involved closing and/or moving away from the area and lack of interest to continue, despite the concept successfully attracting visitors to the area. Visitors coming to the region in recent times still mention the trail, despite signage no longer being in place.

Relationship with Yarra Ranges Tourism Board and Destination Melbourne

CSC has, over the last twenty years, been a member of the official regional tourism board Yarra Ranges Tourism (YRT). (Previously Yarra Valley and the Dandenong Ranges Tourism Board). This membership has not been consistent and was predicated by the requirement that CSC invested financially in the regional tourism board. The financial investment opened the door for tourism operators in the region to be involved in the activities of YRT, including industry development, media famils, international representation and co-operative marketing campaigns. CSC is currently not a financial member of YRT or any other regional and/or official tourism board.

At times CSC was a member of Destination Melbourne as they fell within the government Metropolitan Melbourne boundary. Destination Melbourne was a not-for-profit independent organisation that fulfilled the role of a city-wide tourism board working with the industry to enhance the Melbourne visitor experience. Destination Melbourne folded in May 2019 and no other entity has fulfilled that role.

Greater Melbourne Visitor Economy Forum

This informal networking group meets monthly (approx.), is coordinated by City of Melbourne and chaired by the Director Tourism & Events. It is made up of representatives from greater Melbourne councils and Visit Victoria (VV) often attend to share updates, as does Victorian Tourism Industry Council (VTIC). The group was formed to share challenges and opportunities in response to COVID-19.

Cardinia Shire Vignerons

Cardinia Shire Vignerons was established by local wineries and cellar doors throughout the region as an incorporated association. Despite being supported by CSC, which included the development of marketing materials, the organization no longer operates. Anecdotally, it has been indicated that the capacity to manage the administration of the organization long-term (by either the association members or CSC) was the primary reason for this being deemed as not viable to continue.

Some wineries and cellar doors are working with Wine Gippsland on an ad-hoc basis to participate in relevant promotions and marketing opportunities in the Eat.Drink.Gippsland.guide. CSC is a regular sponsor of the Gippsland Wine Show which is organized by Wine Gippsland.

3 Towards the future

Vision

The proposed Vision for the Strategy is:

By 2025 West Gippsland will be recognised for farm gates, local produce champions, regenerative agriculture practices, and food-related businesses and events.

Whilst this Vision reflects the immediate focus of the Strategy to support the recovery of Bunyip Ward through food tourism, the Vision could also feed into the future development of an overall tourism vision and visitor economy strategic plan for the region highlighting its apparent major strengths and drawcards for visitors:

- proximity to a significant domestic market looking for day trips and experiences post COVID-19
- food tourism (farm gates, local produce, cellar doors, regenerative agriculture practices, food-related businesses)
- nature-based assets and recreation (rural landscapes, trails, walking).

For example, "Connecting with the vibrant and flourishing local food community and the opportunity to enjoy nature-based experiences less than an hour from Melbourne."

WHAT THE COMMUNITY TOLD US…

The special and unique appeal of West Gippsland is the quaint townships and country hospitality, natural scenery and landscapes, proximity to Melbourne, and local food/produce.

Markets

Defining and understanding the markets, personas and activity preferences for current and potential visitors to West Gippsland is needed to underpin tourism planning and marketing decisions.

Figure 2 shows the current and potential visitor markets for the region.

Figure 2. Current and Potential Markets

Current Markets	Potential Markets
– Visiting friends and relatives (VFR) – Melbourne daytrippers (families)	– Visiting friends and relatives (VFR) – Surrounding Local Government Area (LGA) residents – Cardinia Shire LGA residents (particularly new residents moving into the area with urban growth) – Melbourne daytrippers (families, friends, couples, foodies) – Melbourne short break overnight (families, friends, couples, foodies)

With the recovery of the tourism industry in Australia post COVID-19 being led by the domestic sector, Tourism Australia and Tourism Research Australia have developed domestic visitor market profiles focusing on the different demographics and activities of domestic overnight visitors.

These assist with either better understanding the travel preferences of markets, or understanding what the new target market could be, based on the activities the destination currently offers.

The following Tourism Australia market segments could be attracted to West Gippsland:

- Visiting friends and relatives (VFR)
- Adult Couples
- Older non-working visitors
- Families with children
- Short stay visitors (1 to 2 nights).

West Gippsland offers the following activities that would meet the needs of these markets:

- Wineries, breweries, distilleries, farmgates
- National parks (State and nature reserves) and bushwalking.

The full domestic visitor market profiles relevant to West Gippsland have been included in Appendix D.

Tourism Australia data indicates that currently the most popular:

- types of travellers are *VFR*
- travel party is *unaccompanied visitors*
- age group is *55+ years* (closely followed by 15-34 years), and
- type of accommodation is *home of a friend/relative*.[25]

In terms of activity preference:

- 31,000 domestic overnight visitors to the region participate in outdoor/nature activities each year (Visit national parks / state parks, visit botanical or other public gardens, visit farms, bushwalking / rainforest walks)
- 119,000 domestic overnight visitors participate in social activities each year (Visit friends and relatives, eat out/dine at a restaurant and/or café)
- And of these visitors participating in social activities, approximately two-thirds visited friends and relatives and one-third visited cafes/restaurants.[26]

[25] Tourism Research Australia Local Government Area Profiles, 2019

[26] Tourism Research Australia Cardinia Shire Summation Options by Stopover Local Government Area (LGA) and Stopover activity

Target audiences and personas

VV has developed a new set of persona types that reflect their target audience which is *The Lifestyle Leader*.

VV Lifestyle Leader Personas are:[27]

- Drive – Metro Based
  - Dubious Dave and Danielle
  - Reliable Rick and Rhonda
  - New Melbourne Naomi
- Drive – Regionally Based
  - Bordertown Brian
  - Regional Rachel
- Fly
  - Lifestyle Louis
  - Lapsed John and Priya
  - New to Australia Naomi.

Of these personas, the two that are most relevant to the food tourism offering in the area are (in order of priority):

- Reliable Rick and Rhonda
- Regional Rachel.

The features which define these two personas are explained further on the following pages.

THE LIFESTYLE LEADER SEGMENT…

- represents 30.1% of the Australian population (5,950,000 Australians).

- are affluent Australians and 60% of the segment lives in NSW and Victoria. More than 50% are married, and a third of them have a family with children under the age of 16 years.

- are professionals or managers, belonging to AB quintile and have an average annual household income of $130,160.

- are more likely to be Socially Aware and Young Optimism Values Segments (with around 27% belonging to the 100 Leading Lifestyle Helix Community) and 200 Metrotechs.

- like to shop (particularly online shopping), are open to trying new things, and believe quality is more important than price.

- like to stay active when they travel, and the majority like to experience the local culture and see nature.

- like to plan for their trips and are less likely to prefer to have their trips organised for them.

- live a busy life, and because success is important to them, they consider themselves leaders more than followers.

- are more likely to travel within Australia for short and long trips compared to the average Australian population.[28]

[27] Visit Victoria 2021

[28] Visit Victoria 2021

Persona – Reliable Rhonda and Rick[29]

Reliable Rhonda and Rick

Rhonda and Rick fill their busy weekends with road trips to regional Victoria, but they are conservative with their finances.

Visiting regional Victoria is a matter of course for Rhonda and Rick. They both grew up in the 80's, going on regular road trips with their parents with Pseudo Echo playing on the car stereo.

They continue this tradition to this day – sometimes travelling with their children in tow but often taking a weekend away as a couple with someone watching the kids. High repeat visitation every year means this sizeable group of the population props up the visitor economy for regional Victoria.

Rhonda and Rick are active and young at heart, with busy weekends full of entertaining, travelling and outdoor activities. But while they have an adventurous streak, they are conservative with their finances, with family their #1 priority.

Demographic characteristics

- Typically live with their partner and children
- Likely to be Leading Lifestyle Helix Community, Metrotechs or Hearth and Home
- More likely to live in suburbs than inner city

Media habits

- Highly likely to listen to commercial radio
- More likely to still read a physical newspaper
- While they are more likely to watch all main TV channels, their biggest skew goes towards the ABC

Travel habits

- Far more likely to have weekends away and to take daytrips in the car
- Heavy travellers in general – nearly half have travelled internationally in the last 12 months
- Future travel preferences have room for intrastate, interstate and international trips

Interests

- Are very active visiting the beach, eating out at restaurants and entertaining friends and relatives

Attitudes

- Job security is very important and most feel financially stable
- Most feel like they live a full and busy life
- This group use technology a lot, however although they purchase online, they also think that technology is moving too quickly for them

[29] Source: Visit Victoria, 2020

Persona – Regional Rachael[30]

Regional Rachel

Rachel loves exploring both the city and regional areas. She wants new experiences each time she travels.

Rachel lived in Bannockburn and works in Geelong. She takes her job as a small business manager seriously but also places focus on having a thriving social life and believes in having an active life and living in the moment. She has a lot of pride for her young family and often finds herself spontaneously entertaining and hosting, which she thoroughly enjoys.

Living in regional Victoria motivates Rachel to prefer being in nature while on holiday, but her desire to constantly learn new things inspires her to travel to big cities too. She is happy to help her family and friends organise holidays, and her itinerary consists of dining out, shopping for fashionable wardrobe essentials, and experiencing live music or cultural acts. Immersing herself in the local culture is on her radar when she travels, particularly when going overseas.

Demographic characteristics

- More likely to be younger, 18-34 years, degree holders who are employed professionals
- Prioritises self-development through courses or seminars
- Over-indexes on having children under 16 years in the household
- More likely to be paying off home rather than renting

Media habits

- Less likely to read mass newspapers
- Less likely to watch FTA TRV during the week but are just as likely to watch SVOD / Pay TV and are slightly more likely to go to the cinema

Travel habits

- Over-index on preference for all forms of travel (i.e., overseas in the next 24 months), domestically in Australia and regional Victoria
- Are unique in the intrastate market, as have high preference to visit both Melbourne and other areas in regional Victoria

Interests

- Very active on holidays and likes going away on weekends
- Enjoys expensive restaurants
- Keen to try a total ecotourism experience
- Has a wide palette and enjoys food from all over the world

Attitudes

- Is stylish and enjoys getting noticed
- Always ready to try different products and are more likely to go out of their way to learn about new tech
- Holds progressive values (e.g., environmentalism, same sex adoption and human rights)

[30] Source: Visit Victoria, 2020

4 Products and experiences

Hero experiences are those that deliver on a destination's positioning and provide the destination with a real competitive advantage over other destinations. The focus is on what is truly unique, memorable or engaging about a destination; and meeting the needs of the identified target markets.

WHAT THE COMMUNITY TOLD US…

- Cannibal Creek Winery
- Bunyip State Park
- Peppermint Ridge Farm
- Tallawarra Homestead
- Food/Wine/Cafes
- Mount Cannibal
- Gumbuya World

… are the tourism experiences which stand out or provide an exceptional customer/visitor experience.

Current

Currently there are no hero experiences strong enough in their own right to attract people to West Gippsland as a food tourism destination. However, beyond the food tourism focus, Gumbuya World does stand out as an attraction bringing visitors to West Gippsland, alongside Pakenham Racecourse and the nature-based asset of Bunyip State Park. There are also hero experiences attracting visitors to the broader Shire such as Puffing Billy Railway at Gembrook.

The strongest food tourism offerings currently in the area include Cannibal Creek Winery and Peppermint Ridge Farm. These businesses are clearly targeting a visitor market that is looking for a sophisticated visitor experience. These businesses would be integral to short-term marketing and promotional activities that seek to raise awareness of the destination and to start to establish the basis for a food tourism brand.

Emerging

There are some food tourism related experiences currently offering a compelling proposition for visitors to West Gippsland. These businesses have targeted some of the identified market profiles and are delivering a recognised high standard experience. For each of them though, there are opportunities for improvements and expansion to increase visitation by growing their existing market segments and by seeking to attract a wider variety of target markets by delivering an exceptional overall visitor experience. This includes the opportunity for collaborations, packaging and promotions.

Potential

There are opportunities for new food tourism related experiences in West Gippsland as well as others that could be strengthened or better delivered in the short to medium-term. The development of these potential experiences into food tourism drivers for the destination will be reliant on the ability for WGPA, other regional bodies, and CSC to support industry and product development, facilitate professional networks and develop co-operative partnerships and campaigns with Regional Tourism Boards/Visitor Experience Partnerships.

Aspirational

Development of new quality attractions in West Gippsland, or throughout the region, has the potential to make a significant difference in terms of awareness and potential conversion to visitation. This may be a planned project by the WGPA or CSC, or an opportunity that is facilitated and supported by WGPA or CSC and brought to the region by an external investor. The Economic Development Department at CSC is currently developing an investment prospectus which will assist in facilitating these types of opportunities.

WHAT THE COMMUNITY TOLD US…

- Accommodation
- Themed food and wine trail
- Shared pedestrian and cycling trail linking the four railway towns
- Farmers market
- Transport provision between attractions
- Events
- Improved signage
- Specialist local produce stores
- Investment in developing Garfield and Tynong townships

… are the gaps in the current West Gippsland tourism offering that are missing.

5 Challenges

Boundaries and borders

Cardinia Shire falls within three different 'green wedges'. The Southern Ranges Green Wedge and Westernport Green Wedge are primarily located within the Shire, with smaller areas extending into other surrounding shires. The northern hills area of the Shire is included within the Yarra Valley and Yarra and Dandenong Ranges Green Wedge. Management planning is currently lacking for the areas related to the Shire.

COVID-19 restrictions have exposed the local government boundaries that are State Government designated to be regarded as Metropolitan Melbourne. This places a further complication to interface councils that have a recognised regional tourism board (i.e., YRT and Mornington Peninsula Tourism boards). This is relevant to WGPA and CSC as the local government area is not eligible for infrastructure and initiative funding through Regional Development Victoria as they are not regarded as 'regional'.

WHAT THE COMMUNITY TOLD US…

The main challenges or barriers for developing tourism in West Gippsland are a lack of accommodation options and awareness/marketing. Others include infrastructure issues (roads, parking etc) and signage.

Lack of strategic tourism organisation

CSC, and therefore West Gippsland in the context of this Strategy, is not currently aligned with a Regional Tourism Board. The Shire does not fall within the official boundaries of neighbouring Destination Gippsland (DG) which are determined by the investment of the six councils that constitute and represent Gippsland and DG is not proposing to extend their current boundaries.

CSC is also currently not a financial member of YRT, which would be the most appropriate regional tourism board because of the geographic proximity and the key wards (Ranges and Central) of CSC delivering visitor experiences into the tourism branding and activities of the Dandenong Ranges.

Eastern Dandenong Ranges Association is a not-for-profit network of local and social enterprises, which does include some businesses within the region, and is supported by CSC. They would be identified as a Local Tourism Organisation within traditional tourism structures.

The Victorian Visitor Economy Recovery and Reform Plan identifies the establishment of a Greater Melbourne Tourism Recovery Forum. The Forum aims to engage with the tourism industry to improve collaboration and leadership in the Greater Melbourne area. Currently CSC is a participant in the round table discussions but there is no structured official organisation that is charged with driving and supporting the visitor economy for the Greater Melbourne council areas, including the interface Shires of which CSC is one of. As previously identified, Destination Melbourne that undertook that remit folded in May 2019.

Multiple entities progressing food tourism related initiatives

The lack of a strategic tourism organisation, and the resources and support normally provided in this space, have resulted in multiple business, chamber or progress entities within the region working in 'silos'. This includes multiple departments at CSC involved in the delivery and success of potential food tourism related initiatives and individual businesses. Although this has contributed to some success stories in the interim, moving forward, these should be progressed in a more strategic manner.

Having clear accountabilities and objectives of each of the business associations and groups in the Shire as well as a framework of how these organisations can work together will lead to better collaboration and a stronger opportunity to market and promote the area.

Lifestyle businesses

There will be differing levels of enthusiasm from businesses to expand into the food tourism space. Some residents have moved to the region for a lifestyle change and to operate a hobby farm with no intention of growing this to maximise revenue or committing any additional time or resources.

It is important for WGPA and CSC to test the levels of participation in product development and marketing ideas. It is also important to assess the impacts of activities on the broader community to establish the levels of social licence. Open and ongoing dialogue with all community members will be important to establish in the early roll out of the Strategy

Relationship between community, local industry and CSC

Some stakeholders have expressed a lack of trust in CSC with regard to long-term progression and implementation of previously proposed food tourism initiatives. This has evolved from previous interactions with CSC, both tourism and non-tourism related.

There is an opportunity for WGPA and CSC to rebuild relationships with the community and local food tourism industry by using the Strategy to showcase partnerships and collaborative practices. The Strategy could be the catalyst for broader activity by CSC and the establishment of new visitor economy networks.

Focus on providing an exceptional visitor experience

Businesses that are going to be involved in delivering food tourism initiatives and contributing to this sector becoming a key driver of visitation to the region will need to understand what this means in terms of providing an exceptional visitor experience. This will need to include consideration of visitor-friendly opening hours, provision of facilities and services, participating in famils and media visits and having enough product or stock available to service the demand created.

There is no value in creating demand if the supply side does not have the skill, capacity or capability to deliver. This will only lead to visitor dissatisfaction and harm the brand.

6 Opportunities

WHAT THE COMMUNITY TOLD US…

There should be more focus on promoting the appeal of West Gippsland being less than a one-hour drive from Melbourne.

Tourism industry structure reforms

Visitor Experience Partnerships have been foreshadowed as the outcome for transitioning of current regional tourism boards by the Department of Tourism Events and the Visitor Economy (TEVE). It is not yet clear whether CSC is included in a Visitor Experience Partnership model with YRT and Mornington Peninsula Tourism or whether CSC is to be regarded as Greater Melbourne.

Regardless of either outcome there is a growing requirement from State Government, as the primary funder of tourism organisations, infrastructure, marketing and industry programs, that all local governments will be required to play a (more) active role to ensure that their remit in economic development and the visitor economy is realised and that their business community is supported and represented.

In addition, should the WGPA choose to partner and work with a particular Regional and/or Local Tourism Organisation, CSC has indicated that they will support this decision, regardless of which partner the WGPA deems the most well-suited for their needs.

Leveraging current Visit Victoria marketing campaigns

VV launched two intrastate campaigns during Victoria's bush fire and COVID-19 affected period in 2020 and those campaigns remain current in 2021.

Click for Vic

The campaigns included *Click for Vic* which was launched in August 2020 with the objective to encourage Victorians to support particularly regional based, producers, creators and the tourism industry by buying local products via their online portal.

The campaign sought to connect consumers with Victorian businesses with at-home, virtual or delivered to your door experiences and products that helped keep businesses operating and generating some revenue.

The campaign aimed to also profile the state's tourism destinations and keep those supplier regions front of mind for Victorians by creating a link between purchase and location to encourage future visitation.

Whilst the campaign advertising ended on 31 January 2021, *Click for Vic* continues to remain active on the VV website connecting consumers to Victorian tourism-related businesses' offering at-home, virtual or delivered to your door experiences.

Stay close, go further

VV's current campaign – *Stay close, go further* – has been designed to assist in the recovery of the visitor economy by promoting visitation and expenditure within the state. This campaign was originally launched in late 2020 but has been refreshed and rolled out again reflecting the stepped-out process of opening up and the move away from hard lockdowns.

The campaign aims to get Victorians moving again by reigniting the passion for their home state, whilst also targeting visitors from bordering regions of New South Wales and South Australia as those borders reopen and confidence grows.

"It highlights the creativity, culture and beauty of Melbourne and regional Victoria through its people and connects to the notion of 'staying close' (travelling within our great state of Victoria), and the opportunities it affords us, to 'go further' (to discover the unexplored or experience something new)." VV.

The creative concept of *Stay close, go further* is a great opportunity for WGPA to align themselves within their branding and marketing activities.

The creative concept highlighted:

- Makers and creators are story-telling vehicles; they can act as a creative device to build an emotional connection.
- It is a compelling story when our makers and creators share what they love about the region that they live and work in; showcasing key strengths: nature, food and drink, arts, culture and how the natural environment and community inspires.
- The use of characters to carry that message creates interest and pride.

WGPA should consider the use of the makers and creators' creative concept as well as seek to reference the look and feel of the VV campaigns so as to leverage off that branding and activity in the initial burst of marketing and public relations actions.

A snapshot of the types of destination and maker and creator content that VV is developing can be found in Appendix E.

Travel Kind

As travel returns across the state, VV has also created the new Travel Kind initiative as a part of *Stay close, go further.* It aims to remind Victorians to plan ahead and make forward bookings, try something new and consider lesser-known destinations to avoid crowds, and to be kind, patient and considerate when travelling. West Gippsland can capitalise on, and promote, it's country hospitality.

Enthusiasm and momentum

Many of the stakeholders that contributed their ideas in the development of the Strategy expressed an enthusiasm to more effectively partner and collaborate with each other to progress food tourism as a key driver to the region.

Agritourism is a key growth market

The food and agribusiness sector is a vital contributor to the Australian economy and a potential key source of growth.[31] Australian Regional Tourism has recently been successful in securing funding to support a national agritourism development program for all of regional Australia, demonstrating the interest in this space from both a producer and a tourism point of view. This will support new or expanded local events, strategic regional plans, experience and product development and leadership and capability strengthening activities that will provide economic and social benefits to regional and remote areas.

Tourism product audit

There would be value in completing a separate piece of work in the form of a tourism product audit for the region to establish assets (accommodation, attractions, and other services), their condition, gaps, opportunities and status (as current hero, emerging, potential or aspirational experiences). This would provide the most complete and up-to-date information to inform development of a future Destination Management Plan or Tourism and Visitation Strategy for the complete Shire. This would also provide valuable insights and assist to inform and influence the industry structural reforms that are currently underway, being driven by the Department of Jobs, Precincts and Regions.

[31] Food and Agribusiness: A Roadmap for unlocking value-adding growth opportunities for Australia 2017 (CSIRO)

Leveraging existing farming and food-related initiatives and resources

There are several complementary farming and food-related initiatives and resources which the WGPA can look to expand on, and collaborate with, for mutually beneficial outcomes. Some of these include:

- The Cardinia Food Movement and Food Circles Collective Impact Project which is a cross-sector collaborative effort to grow a healthy sustainable food system in the region.
- Farmers throughout the region have recently been working with Farming Together to identify collaborative ideas for building resilience, including regenerative agriculture. The workshops held created great networking opportunities for product development, industry strengthening and branding/marketing. This energy and enthusiasm should continue to be harnessed and this foundational work built on.

Accredited farmers' markets

Victorian farmers' markets provide an opportunity for our farmers to sell direct and take full credit for their efforts. By shopping at farmers' markets, customers are guaranteed access to quality, freshly harvested produce whilst supporting local farmers and directly putting money back into regional Victorian communities. Increasingly the public is becoming more conscious of its food choices and looks to VFMA accreditation as a signal that a market's stallholders can be relied upon to be selling their own locally grown or made product.

Sharing sustainable practices and produce knowledge

Regenerative agriculture can be a key element in attracting traditional tourism markets, but this positioning is also attractive to linking into education and corporate markets longer-term. School groups, at all levels, coming out to West Gippsland to study regenerative agriculture initiatives as part of their curriculum. Similarly, corporate groups including delegations and VIPs undertaking field trips and study famils into this opportunity, possibly facilitated by Global Victoria can position the region and increase visitation and promotional profiling.

Cooking schools (such as Peppermint Ridge Farm) using native and locally produced produce could develop product experiences in the educational space to attract that market to the area. Previous initiatives with school children have been successful with Victorian Farmers Federation with virtual tours (had intended to be in-person visits but had to be delivered online during COVID instead). Building on this movement will align with the brand development of the food tourism offering in the region. This product and experience development can lead to businesses moving into the international tourism sector and become a hero experience that will drive increased visitation levels.

Accommodation

As green wedge zoning restricts potential traditional accommodation investors, alternative options could be investigated such as hosting a CABN-style accommodation (off-grid, sustainable and eco-friendly relocatable cabins) or facilitating camping options. Hosting a CABN or other such demountable/pod accommodation styles, provides landowners with the option of creating a passive income stream for their properties and utilising land that may otherwise not be revenue generated. It is also a great opportunity to share their property with visitors, through the form of offering nature-based and eco-tourism sustainable accommodation.

For example, CABN when scouting potential locations look for:

- Land that's usually within 1-3 hours of a major city, encouraging guests to escape into nature and focus on the beauty that surrounds them.
- Accessible sites, with a level area suitable to place a CABN whilst maintaining total privacy away from manmade light and noise.
- Unique, beautiful locations with the potential of multiple CABN's per site.

These accommodation types can align and strengthen the regions positioning and brand development.

Future Shire-wide tourism planning

A separate body of work is required to develop a Destination Management Plan or Tourism and Visitation Strategy for the local government area which will help to identify how the region can position itself to hold a strong position in a highly competitive marketplace and to support their current and emerging business communities that are targeting a visitor market. It will also identify those experiences that really set the region aside, that highlight the special and unique characteristics of the region and can be developed further to create a combination of products currently in market, as well as new product areas for growing the visitor experience. Leveraging existing experiences with additional experiences, creating accessible tools and implementing focused marketing is critical to success.

7 Action plans

The first set of actions within the Quick Wins Mini Destination Marketing Plan includes recommendations that:

1) can be delivered in the short-term (over the next six months),

2) have existing funding available,

3) are where the WGPA can mostly utilise their capacity and capability to deliver,

4) will create legacy assets and create immediate marketing activity to facilitate visitation.

The second set of actions within the Food Tourism Strategy includes recommendations that:

1) can be delivered in the medium to long-term (second half of Year One, Year Two, Year Three, or beyond),

2) will require future funding to be sourced

3) are where the WGPA can utilise their capacity and capability to deliver, or may need to work with or commercially engage an identified partner.

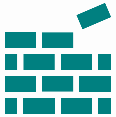
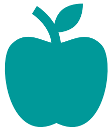
Whilst it is noted that some actions in both the following Quick Wins Mini Destination Marketing Plan and Food Tourism Strategy involve the WGPA advocating to CSC, it is important to clarify that this is the extent of the commitment by CSC that is expected.

The intention is that recommendations made for the WGPA in the first six months will be able to take advantage of having existing funding available. Following this, the WGPA will need to seek to develop partnerships and other funding solutions in order to deliver on the next set of recommended actions and beyond the life of the Strategy. These partnerships and funding solutions may be with CSC or through other organisations.

Whilst indicative and approximate budget ranges have been provided to assist the WGPA with prioritisation of the recommendations, these should not be seen as definite market indications. Detailed briefs of the requirements and scopes of work would need to be developed for many of these recommendations to progress, and each will differ on their objectives and scale. Budgets for some recommendations could also be scaled, allowing the WGPA to be able to deliver different levels of results in response to the budget available.

Recommendations have been defined as those which can take immediate advantage of available funding, or those which would require future funding to be sourced. Recommendations which are fundamental tourism requirements and should be interpreted as mandatory are also identified. Where there is benefit and scope for these recommendations to be expanded Shire-wide at a later stage, these have also been identified.

Figure 3. Action Plans Legend

SYMBOL	MEANING
	Existing funding is available for this recommendation.
	Funding will need to be sourced for this recommendation.
	Foundational pieces of tourism planning.
	WGPA Pilot Programs - suitable to be expanded Shire-wide at a later stage.

Quick Wins Mini Destination Marketing Plan

Summary

Laying the short-term foundations for long-term success will be essential if the region is going to be prosperous in developing food tourism as a key driver of increasing visitation to West Gippsland.

This Action Plan identifies prioritised recommendations over the next six months across the strategic areas of:

- Strengthening the industry (supply)
- Creating awareness (demand).

Strengthening the industry (supply)

The State Government has identified, as part of the *Victorian Visitor Economy Recovery and Reform Plan April 2021*, the need to allocate resources and focus into the supply side of the industry with an aim of supporting operators to improve business and digital capabilities and to support skills development.

- Partnerships and collaboration
- Skills training programs (with a focus on digital capability and customer service)
- Foundational planning pieces.

Creating awareness (demand)

Using social and traditional medium to create awareness of the regions products and experiences can help drive consumer behaviour to influence the targeted markets decision making on when and where to visit. Use of correct tone and visuals, compelling offers and strategic placement in the channels where the preferred visitor is looking for options will increase the likelihood of visitation. Aligning with existing campaigns will create confidence and reach.

- Public relations and media
- Digital strategies and execution options
- Promotion and advertising.

Action Plan: Strengthening the industry (supply)

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
PARTNERSHIPS AND COLLABORATION	PC1	Buy in to Yarra Ranges RTB to gain benefits for the industry including industry strengthening activities and marketing campaigns. WGPA to discuss with CSC to determine best approach prior to discussions with YRT: a. Is it the whole council area b. Targeted to Bunyip Ward c. Include the other key Tourism Association Ward Currently there is funding as. part of this project and if option a. or c. were activated matching funding would have to be allocated for equity.	Addresses the lack of strategic tourism organisation alignment.	WGPA and CSC to determine best option from those proposed for the industry to have access to the benefits.		$10K-30K
	PC2	WGPA to become actively involved with, and assist with organising, the next Cardinia Farm and Food Festival (planned for Feb 2022). And overall, look to support the expansion and promotion of the Cardinia Farm and Food Festival.	Leverage existing farming and food-related initiatives and resources. Opportunity for the WGPA to step into this space to ensure the event contributes to their desired outcomes.	WGPA to approach Cardinia Food Movement.		TBD – dependant on brief

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
	PC3	Explore how to activate the railway line travel corridor and how this might create packages / incentives with V/Line, particularly on key dates including senior citizens week 'ride the rail'.	Capitalise on the proximity of West Gippsland to Melbourne and the public transport available.	WGPA to discuss with V/Line	$	$0-5K
	PC4	Host a preliminary workshop to assist interested food services and tourism providers to better understand local food provenance, and what produce is seasonal and available in West Gippsland. (First stage before developing and delivering other basic industry training).	This foundation will help workshop participants move into collaborations to invest and expand into delivering exceptional food and beverage experiences.	WGPA with the support of CSC. WGPA to approach Cardinia Food Movement.	$	$0-5K
	PC5	Develop and deliver basic industry training workshops and tools regarding packaging, commissions and collaborations with a goal of establishing a purchasable experience that focus on a food and beverage experience.	There is an appetite from industry to work more effectively together in terms of cross promotion and packaging. Lifting the awareness and skills of how to price and package products and experiences will help grow the opportunity for sales promotions and awareness.	WGPA with the support of CSC	$	$0-5K * Could be combined with S1

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
			Working towards developing one hero regional commissionable product that can be sold by third parties, including tourism trade will help position the region into the interstate and international market.			
	PC6	Explore the opportunity for the WGPA to work formally with the EDRA.	Brings the east and west ends of the region together in lieu of not having guidance from an RTO.	WGPA to approach Eastern Dandenong Ranges Association	$	No cost – requires time and effort
SKILLS TRAINING PROGRAMS	S1	Create and deliver an industry strengthening program of workshops and tools that seeks to address fundamental knowledge gaps, skills shortages, digital capabilities and business resilience. There are a number of industry bodies and government organisations that provide tools and online modules and workshops that industry can access to increase their skills level. These include Business Victoria, VV, Tourism Australia, ATEC, Regional Tourism Boards and VTIC,	Aligns with government initiatives and will leave a legacy for local industry.	WGPA to advocate to CSC	$	$10K-30K, or depending on scale $30K+

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
		but there may be better value in facilitating a team atmosphere by the creation of a bespoke and targeted industry program for either Bunyip Ward or wider council industry participation. An external tourism consultant/company that specialises in developing and delivering capacity and capability building training would be engaged to deliver these and also support operators to undertake official certification pathways including WTD. Industry bodies such as Victorian Tourism Industry Council run industry accreditation programs including the national Quality Tourism Framework (QTF) that provides businesses with the necessary online tools and resources to ensure best practice management, customer confidence and ongoing sustainability.				

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
FOUNDATIONAL PLANNING PIECES	F1	Revisit WGPA name and purpose to align with tourism boundaries and existing entities.	West Gippsland brand has already been invested in, and promoted heavily, by Baw Baw Shire and also lies within DG – both of which are independent of WGPA and CSC.	WGPA	$	$0K-5K, if branding required
	F2	Review tourism and directional signage from highway to create Signage Plan for implementation by relevant bodies. (Second phase of this action to be addressed in Food Tourism Strategy).	Will assist with wayfinding for visitors.	WGPA to advocate to CSC and VicRoads	$	$10K–30K, strategy / audit only
	F3	Engage an external tourism consultant/company to conduct a regional product audit to identify and assess industry capability, capacity constraints, product gaps and infrastructure investment opportunities. (Some baseline information for the external tourism consultant/company to begin with and build from may be available from CSC).	Will inform development of a future Shire-wide Destination Management Plan or Tourism and Visitation Strategy.	WGPA	$	$10K-30K

Action Plan: Creating awareness (demand)

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
PUBLIC RELATIONS AND MEDIA	PR1	Engage a PR consultant and develop a PR campaign leveraging of the look and feel of the existing VV *Click for Vic* and *Stay close, travel further* campaigns with a focus on pitching the makers, creators' producers, characters and railway villages of West Gippsland. The campaign should: - Look to build in Regen-Agribusiness/farmgate stories to start to create a brand position. - Develop content for, and secure placement in, online newsletters such as 'One hour out' and 'Broadsheet' - Facilitate famils from identified media to experience the region.	A considered and professional PR campaign is the best way to create quick wins and drive visitation.	WGPA with the support of CSC	$	$10K–30K, Consultant only – not media buy or asset creation
	PR2	Appointed PR Consultant to develop media pack with information, images, key words,	Effective media packs make it easy to ensure that the key products and messages are being represented correctly.	WGPA with the support of CSC	$	$0-5K * Combined with PR1

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
		social media handles, maps, links for distribution. Theme: building on the Regen farming brand story.				
	PR3	Create a vehicle-based Foodie Touring Route and produce and distribute a tear off graphic vehicle-based touring route map highlighting existing products and experiences. Use this as the first stage to be developed into a more refined version in the future.	This will encourage regional dispersal and increase awareness of what landscapes, attractions, experiences and restaurants exist throughout the region.	WGPA	$	$10K–30K, depending on details
DIGITAL STRATEGIES AND EXECUTION OPTIONS	D1	Facilitate and ensure that every relevant food tourism business, supportive products and related experiences and events in the area has an up-to-date ATDW listing, taking advantage of the current free voucher promotion.[32] Numerous restaurants, cafes and farm gate experiences could be added to this database.	This is the database that marketing campaigns will pull products and experiences from to create the tactical solutions for the market.	WGPA with the support of CSC or the support of YRT as part of membership / partnership	$	$0-10K

[32] At present there is no direction on the future payment model of ATDW subscriptions, with discussions due to take place early 2022, and industry to be notified once a decision has been made

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
	D2	Development of a food tourism experience content library including high resolution images and video which can be accessed by WGPA, CSC, tourism marketing bodies, media and businesses. Stage one should focus on existing food tourism related content – businesses, food, wine, local personalities / characters that can be used for promotions. The assets that VV has created should be used as a guide to capture the look and feel of the content creation. (As previously mentioned, a snapshot of the types of destination and maker and creator content that VV is developing can be found in Appendix E. The VV Content Hub also has examples available to view at https://contenthub.visitvictoria.com/).	Facilitates the use of "one voice" through the same collateral being shared. Cardinia Farm and Food Directory already have content and are open to discussing sharing this.	WGPA to approach Cardinia Farm and Food Directory to discuss potential partnership.	$	$10K–30K or $30K+, dependant on brief
	D3	Seek to optimise the CRM for the Cardinia Farm and Food Directory to create opportunities for reaching existing and new markets with	The platform already helps local people and businesses find local food in the region, so this is a resource which	WGPA to approach Cardinia Farm and Food	$	No cost – requires time and effort

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
		special and seasonal offers. Ensure that the website is fully optimised whilst at the same time making sure that there is no breach of privacy.	could help visitors do the same.	Directory to discuss potential partnership		
PROMOTION AND ADVERTISING	A1	Develop and distribute an operator toolkit and encourage use of the WGPA brand assets including key words, hashtags, images, videos to create cross marketing ties between local players (council, WGPA, Cardinia farm and food, local businesses).	Facilitates the use of "one voice" through the same collateral being shared.	WGPA with the support of CSC	$	$10K–30K
	A2	Develop a distinct villages social media marketing campaign concentrating on bringing people to the village of Garfield as the hub in the first instance. Look to extend to other railway towns	Garfield is emerging as a boutique retail and food village. Using the strongest cluster of attractions, other locations will benefit from a flow-on effect.	WGPA	$	$30K+
	A3	Explore how to activate empty store fronts in the villages as food/retail/art pop ups.	Better display of local produce provenance and adds to overall street appeal of villages.	WGPA with the support of CSC	$	$10K–30K, for report only not activation $30k+ with activation
	A4	Other ways that WGPA and CSC should consider working with Regional Tourism Boards and VV include:	VV have a full team of marketing, famil and trade experts there to support regions, destinations and products profile their	WGPA with the support of CSC or as part of the YRT membership	$	$10K–30K

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
		- Liaising with the PR team on new products, services and events - Offering to host media and trade famils - Working with key VV and Regional Tourism Board staff to conduct a product familiarisation tour and/ or book an inhouse presentation of the current offerings. - Working with suppliers to position produce and products in VV and other governments activities (i.e., VIP gifts, welcome packs, thank you pieces etc). - Advertise in the Official Visitor Products - Be part of the Click for Vic cohort	experiences to the markets that they have cultivated on their platforms. They are always on the lookout for new stories, characters and things to do.			

Food Tourism Strategy

Summary

Whilst some fundamental steps can be undertaken in the immediate future by WGPA to develop food tourism as a key driver of visitation to West Gippsland and strengthen the industry knowledge and skills, overall, it is strongly recommended that any long-term strategic planning be considered and addressed Shire-wide in order to capitalise on a larger critical mass of products and experiences which collectively can contribute to building brand and destination awareness and create a compelling and successful visitor proposition.

This Action Plan identifies prioritised recommendations for the second half of Year One, Year Two, Year Three, and beyond, across the following strategic areas:

- Product and experience development
- Industry development
- Marketing and communications
- Governance (including the role of WGPA)
- Destination planning and management.

Product and experience development

- Quality over quantity should be front of mind.

Industry development

- Businesses need to better understand the tourism industry, ways to deliver visitor experiences and the benefits of working together.

Marketing and communications

- Consistent messaging and leveraging existing resources.

Governance (including the role of WGPA)

- Tourism body alignment.

Destination planning and management

- West Gippsland and Shire-wide positioning.

Action Plan: Food Tourism Strategy

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
PRODUCT AND EXPERIENCE DEVELOPMENT	PE1	Grow and strengthen the Foodie Touring Route concept through: a) creation a self-drive opportunity to visit selected farm gates and venues over a specific weekend as a new event using incentives such as discounts, rewards and vouchers to drive purchasing decisions (i.e., this is an interim solution whilst a larger Shire-wide themed food trail itinerary is developed). b) linking the themed vehicle-based Foodie Touring Route through identification by unique signage along the route. (See example of The Central Coast Plateau Harvest Trail in Appendix F). c) refine the first stage of the vehicle-based Foodie Touring Route tear off graphic vehicle-based touring route map and expand this Shire-wide. This would ideally involve adding more food, tourism and nature-based assets across CS.	Only requires buy-in from farm gates for one dedicated weekend, which is more realistic for them to manage in terms of their capacity. This will encourage regional dispersal and increase awareness of what landscapes, attractions, experiences and restaurants exist throughout the region.	WGPA with the support of CSC		$30K+

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
	PE2	Conduct a feasibility assessment for a transport provider or bus tour to bring private sector investment to offer a hop-on, hop-off service to food tourism attractions throughout West Gippsland.	Provides a way to connect visitors with the food tourism experiences.	WGPA with the support of CSC		$0-10K Assessment only
	PE3	Pending the outcomes of the feasibility assessment, put out an Expression of Interest for a transport provider or bus tour to bring private sector investment to offer a hop-on, hop-off service to food tourism attractions throughout West Gippsland.	Provides a way to connect visitors with the food tourism experiences.	WGPA with the support of CSC		TBD – dependant on brief
	PE4	Work with Pakenham Racing Club to create a regional signature event (i.e., a picnic event on the racecourse/park) linked with Melbourne Food and Wine Festival and showcasing local products and produce. Pakenham Picnic was held in 2018, however something more closely aligned with local food and produce could be established.	Uses existing well-known venues through events as the vehicle to showcase local produce.	WGPA with the support of CSC		$30K+
	PE5	Work with Pakenham Racing Club to see how to leverage off their regular racing program to promote the food tourism offering.	Uses existing well-known venues through events as the vehicle to showcase local produce.	WGPA with the support of CSC		$10K–30K

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
	PE6	Work with Pakenham Racing Club to support activation of the venue to hold other event types and identify how the food tourism offering can be integrated. For example, a series of Picnic Race Meetings featuring seasonal local produce and artisans.	Uses existing well-known venues through events as the vehicle to showcase local produce.	WGPA with the support of CSC		$30K+
		Work with Gumbuya World to support activation of the venue to identify how the food tourism offering can be integrated.	Uses existing well-known venues through events as the vehicle to showcase local produce.	WGPA with the support of CSC		$10K–30K
	PE7	An investment prospectus for CSC is currently being developed by the CSC Economic Development Department. Once this document is finalised and made available, the WGPA can assist with the promotion of the identified agriculture, accommodation, attraction and/or food tourism opportunities specifically located in West Gippsland. This may be achieved through participation in investor meetings, social media or provision of information/data.	This will facilitate and support private sector investment into new quality attraction/s.	WGPA		$0-10K

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
	PE8	Series of networking events for local businesses to share their learnings with their wider industry peer group (i.e., accommodation provider that has converted a barn on a farm or rural property). These could be held at different locations to facilitate famils of each other's products and get to know the other visitor experiences available throughout West Gippsland.	Facilitate networking and better knowledge of each other's products for cross-promotion.	WGPA		$10K–30K
	PE9	Leverage from recent success of Garfield food businesses progressive dinner (held during lockdown) and work with these four businesses to recreate this experience as an in-person event with restrictions now having been lifted.	Leverage from the momentum already created.	WGPA		$10K-30K
	PE10	Organise and host a Garfield main street long lunch event in conjunction with Melbourne Food and Wine Festival program.	Utilises the experience of the group which currently host the Garfield Christmas Festival as they already know how to navigate council permissions etc to close down the street.	WGPA to approach Garfield Community Group		$10K–30K

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
	PE11	Explore possibilities for visitors to engage with the Cardinia Food Movement / Cardinia Community Food Hub / Food Box Program.	Provides a way to connect visitors with food tourism experiences.	WGPA to approach Cardinia Food Movement		No cost – requires time and effort
	PE12	Expand murals along the railways townships to include more food-related imagery to promote other businesses, produce and parts of West Gippsland. Schools or visual art students could be involved. (This could be led by community, however CSC support may be required if using public or heritage buildings).	Access to Arts based grant funding might be possible for the WGPA or local town business associations with this Action.	WGPA with the support of CSC and local town business associations		$30K+
	PE13	Look to work with Arts and Culture organisations and appropriate CSC department to broaden food tourism related initiatives at events and maximise the makers and creators campaign assets and offerings.	Leverage off makers and creators.	WGPA with the support of CSC		$10K–30K
	PE14	Development of an 'Eat Local' style campaign identifying venues actively choosing to include local produce on their menu (i.e., sticker displayed in window and logo).	Despite a strong focus on locally grown produce being used in cafes and restaurants, the provenance could be better displayed.	WGPA to approach Cardinia Farm and Food Directory to discuss		$10K–30K

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
				potential partnership		
	PE15	Investigate the possibility of a cycling-based Foodie Touring Route and produce and distribute a tear off graphic cycling-based touring route map highlighting existing products and experiences. Possible concepts include formalising a 5km trail from Tynong train station to Cannibal Creek Winery and Peppermint Ridge Farm so visitors can bring their bicycles on the V/Line from Melbourne, or progressing the Railways Towns Trail or Main Drain Trail from the CSC Pedestrian and Bicycle Strategy.	An infrastructure investment which will link a recreational experience to a food tourism related experience. Will also potentially align with and be supported by the CSC Pedestrian and Bicycle Strategy.	WGPA with the support of CSC		$10K–30K

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
	PE16	Promote a one-off food event focussed on Garfield or Bunyip based on a Town Take Over with high profile guest chef/s. Could possibly use the V/Line network and promote the proximity to Melbourne. (This action will also be able to utilise the content library assets and goodwill of local business which will have been built during Year One).	This type of event has a good track record of creating media interest and can highlight produce and products from regional areas. Good opportunity to partner with V/Line to meet their community support objectives.	WGPA		$30K+
INDUSTRY DEVELOPMENT	I1	Experience development workshops for the food and drink sector to further develop the approach to presenting local produce and packaging opportunities across the sector. a) identify and promote upcoming food tourism related conferences, workshops or online training opportunities (VTIC, VV, Food and Wine Victoria etc) which local businesses can register for and attend. Consider offering funding or partial funding of attendance for participants. b) include building capacity and capability of products across the region, which currently has a limited amount of 'export ready' product. Products and experiences across the region can be	Supports operators to build capability and develop their products and experiences to provide exceptional visitor experiences. This will also be very appealing to international visitors, even if they do not progress to meet the VV 'export ready' criteria (although this would be the ultimate long-term goal to for when COVID-19 travel restrictions are lifted for international visitors). Opportunity to access support for industry to	WGPA with the support of CSC		$30K+

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
		brought up to 'international standard'. This means being either export ready and/or having commissionable pricing structures that allow for third party selling. c) include skill building aligned with '6.2.1 Action Plan: Strengthening the Industry (supply)' program above to be conducted including the key areas identified by TEVE including – online capability, maximising marketing, financials, business resilience, partnering, mentoring.	participate in established workshops in either the Greater Melbourne or the RTB areas.			
MARKETING AND COMMUNICATIONS	M1	Encourage food and beverage outlets to increase food provenance by choosing to a) use local produce and b) actively promoting this to their customers. For example, listing specific food items and where they have been sourced from on their menus.	Cross-promotion of each other's products and experiences.	WGPA	 	$10K-30K
	M2	Encourage food and beverage outlets to creatively work with local businesses to name a special menu item after them.	Cross-promotion of each other's products and experiences.	WGPA	 	$0-10K

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
	M3	Link initiatives to the United Nations Decade of Family Farming 2019-2028 and relevant United Nations Sustainable Development Goals.	Sharing this with the public and local businesses will help them to better understand the global alignment.	WGPA		No cost – requires time and effort
	M4	Expansion of the food tourism experience content library - including high resolution images and video which can be accessed by WGPA, CSC, tourism marketing bodies, media and businesses. Stage two should expand the food tourism experience content library to include other content such as nature-based tourism assets, accommodation, events etc. (As previously mentioned, the VV Content Hub has examples available to view at https://contenthub.visitvictoria.com/).	Facilitates the use of "one voice" through the same collateral being shared.	WGPA to progress with / without Cardinia Farm and Food Directory (depending on whether partnership has been established in the first stage)		$30K+

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
GOVERNANCE	G1	Proactively forge a more formal partnership with Cardinia Farm and Food, with members on both committees.	Addresses the challenge of organisations working in silos across the region.	WGPA to explore potential collaboration with Cardinia Farm and Food.		No cost – requires time and effort
	G2	Arrange to meet with appropriate CSC staff on a regular basis to discuss progress of food tourism initiatives.	CSC currently meet regularly with EDRA, so there would be benefit in the WGPA having similar opportunity to connect with CS.	WGPA to approach CSC		No cost – requires time and effort
DESTINATION PLANNING AND MANAGEMENT	T1	Engage an external tourism consultant/company to conduct a separate Accommodation Audit including not only room and bed capacity, but also accommodation-specific categories (such as luxury, eco, industry, share economy, onsite catering etc). (Some baseline information to begin with and build from may be available from CSC).	Better understand offering, inform decision-making surrounding room quantities and accommodation types, define markets and to contribute towards attraction of funding into new developments.	WGPA to advocate to CSC		$10K–30K

STRATEGIC AREA	ACTION NO.	DESCRIPTION	RATIONALE	RESPONSIBILITY	FUNDING / FOUNDATIONAL / WGPA PILOT	APPROX. BUDGET RANGE
	T2	Completion of a Shire-wide Destination Management Plan or Tourism and Visitation Strategy.	Will contribute to strategic Shire-wide tourism planning.	WGPA to advocate to CSC		Not WGPA budget line
	T3	Progress the second phase of the Signage Plan by working with relevant bodies to implement wayfinding signage recommendations. (Tourism and directional signage from highway should have already been addressed in the first phase).	Will assist with wayfinding for visitors.	WGPA to advocate to CSC and VicRoads		$30K+
	T4	Source funding for a refreshed study / data collection to include small scale producers and understand the "true" value of agricultural production in the region.	Will contribute to strategic Shire-wide tourism planning, with attention on agritourism.	WGPA to approach Cardinia Food Movement		$10K–30K

8 Targets and measurements

Establishing a performance baseline within the small focus area of the Strategy (i.e., Bunyip Ward) is not possible using the current tourism industry set of data inputs. The geographic area and sample sizes are not large enough to register and do not provide confidence in benchmarking.

It is recommended that the progress and success measurement of the Action Plan be reviewed by the WGPA in conjunction with CSC every three months as part of the remit of the CSC Economic Development Department. This would involve stakeholders responsible for each of the recommended actions reporting to the Economic Department on their progress. All actions should develop targets and KPIs and establish measuring techniques and processes into the design of the action so that the effectiveness of the activity can be measured. This could mean involving operators in the collection of key fulfilment data and ensuring a commitment from operators to share/provide their information in the spirit of collaboration.

This could include the collection of visitor statistics, surveys, voucher redemption, marketing reach, call to action fulfillment, event bookings, financial targets, media profiles, participants in programs, uptake of training, increases in listings or accreditations etc.

Key performance indicators that measure success should be based on SMART goals and be able to be reported openly and transparently to industry and funding partners without compromising commercial confidences.

APPENDIX 1. CONSULTATION SUMMARY

Summary

Advice was sought from the WGPA and CSC with regards to stakeholder consultation, and more than 80 invitations were extended to individuals and businesses to participate in the development of the Strategy.

Consultation was held over three-week period from 18 Oct 2021 to 05 Nov 2021. Selected additional stakeholders were also consulted after this date to ensure their inputs were incorporated into the Strategy.

The survey (hosted on CSC Creating Cardinia website) was open for community contributions for three and a half weeks from 10 Oct 2021 to 03 Nov 2021. 16 contributions were received.

The opportunity to provide input through group online discussion sessions was offered to targeted local food tourism related businesses, WGPA members, CSC Councillors and selected CSC staff, with six attendees participating.

24 one-on-one interviews were conducted with community, local businesses, tourism industry, Government officials, Regional Tourism Boards, WGPA members, CSC Councillors and CSC staff from multiple departments. Organisations included VV, DG, YRT, Eastern Dandenong Ranges Association, Parks Victoria, Wine Gippsland and TEVE.

Types of local businesses included cellar doors, attractions, cafes and restaurants, pubs, retailers, accommodation providers and venues.

Three responses to the questionnaire were returned by direct email.

Survey Questions

General questions

West Gippsland experiences: What makes West Gippsland special and the visitor experience here unique? Please list your top three.

'Hero' tourism experiences: What are the 'hero' tourism experiences in West Gippsland that stand out or provide an exceptional customer/visitor experience (these might be farms or agritourism, nature-based, food and wine, or another attraction). Please list your top three.

Gaps and opportunities: Please list any significant gaps or opportunities in the current West Gippsland tourism offering that you feel are missing and would appeal to the Melbourne visitor market?

Challenges or barriers: What are the top 3 challenges or barriers for developing tourism in West Gippsland? (Think about access, infrastructure, accommodation, services, customer service, opening times, products and experiences…)

Questions for business owners in West Gippsland

Where do you currently market your product?

- Local/regional brochures and websites
- No formal marketing in place – word of mouth/community knowledge.
- Social media – Facebook, Instagram, Twitter
- Own brochure
- Local media – radio, newspaper, TV
- PR firm
- Own website.

If you are a tourism business owner/operator in West Gippsland, do you have your business listed on the Australian Tourism Data Warehouse (ATDW) to ensure it can be promoted widely?

Do you host/organise special events at your business (e.g., regular market days, concerts, family days?)

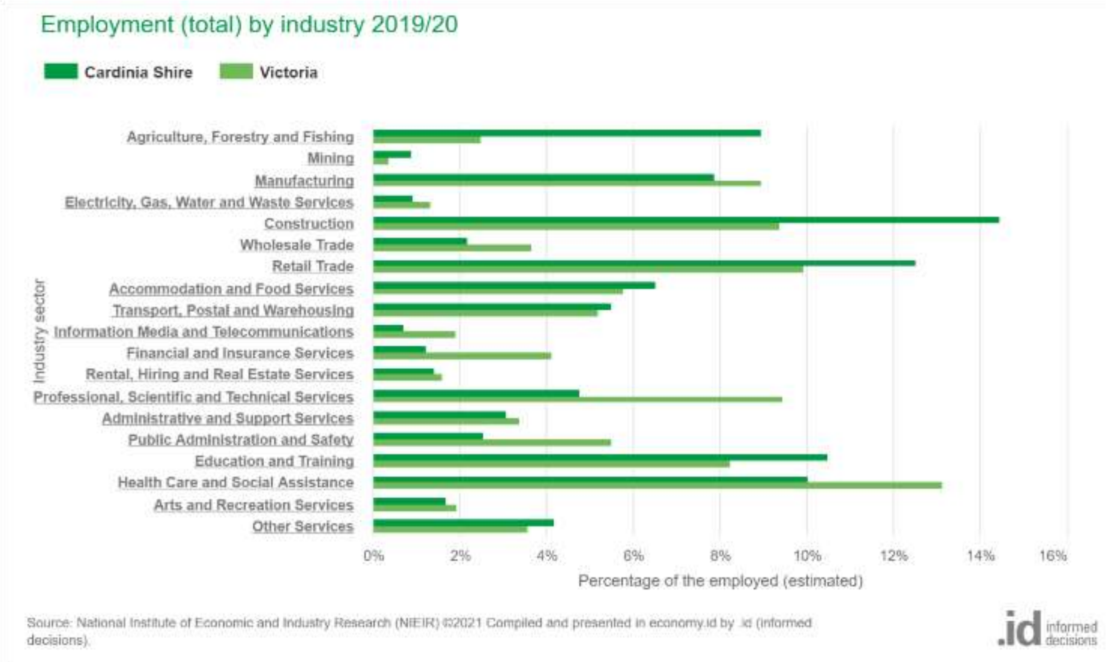
Has an Accredited Visitor Information Centre team or team member undertaken a famil at or visited your business to learn about what you offer?

If you are interested in becoming more involved in agritourism, what do you currently grow/produce/offer?

- I am not interested in becoming more involved in agritourism
- Fruit
- Vegetables
- Dairy
- Beef/Cattle
- Other Animals
- Beekeeping
- Pick-Your-Own
- Produce Stall/On Site Direct Sales
- Accommodation
- Guided Tours/Demonstrations
- Restaurant/Café
- Market/Event
- Other (please specify).

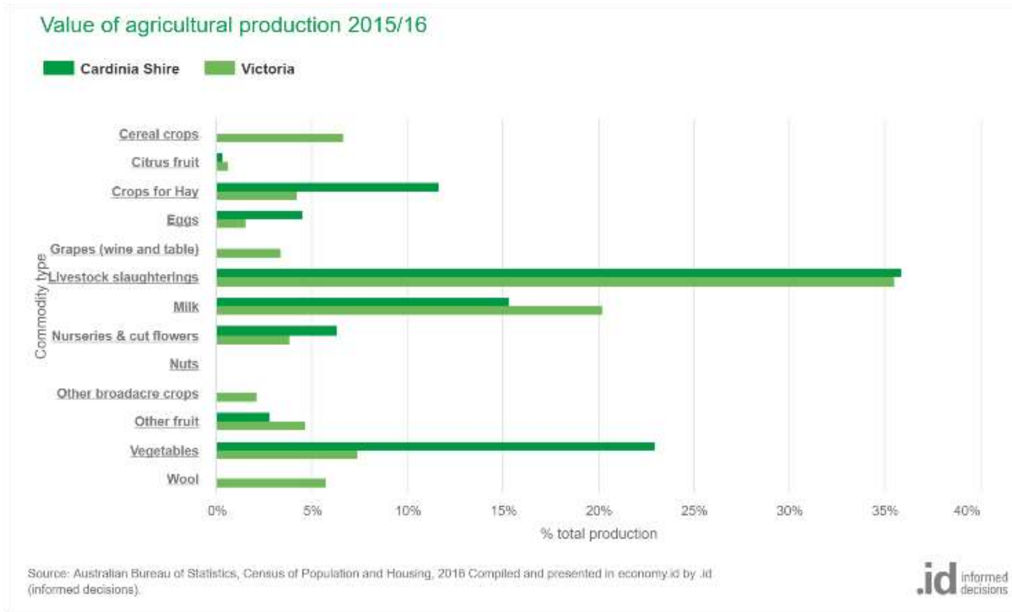
APPENDIX 2. INDUSTRY AND VISITOR ECONOMY

Figure 4. Employment by industry in Cardinia Shire



Source: https://economy.id.com.au/cardinia

Figure 5. Value of agricultural production 2015/16 in Cardinia Shire



Source: https://economy.id.com.au/cardinia

Figure 6. Key tourism statistics for Cardinia Shire

	INTERNATIONAL	DOMESTIC OVERNIGHT	DOMESTIC DAY	TOTAL
VISITORS	12,000	140,000	765,000	916,000
NIGHTS	420,000	324,000	---	744,000
AVERAGE NIGHTS	35	2	---	5
EXPENDITURE	$14 million	$27 million	$46 million	$87 million
SPEND PER TRIP	$1,220	$191	$60	$95
SPEND PER NIGHT	$34	$82	---	$55

Source: Tourism Research Australia Local Government Area Profiles, 2019

Figure 7. Tourism statistics insights for Cardinia Shire - Reason

	INTERNATIONAL	DOMESTIC OVERNIGHT	DOMESTIC DAY	TOTAL
HOLIDAY	np	np	272,000	288,000
VFR	9,000	97,000	351,000	457,000
BUSINESS	np	np	np	np
OTHER	np	np	np	np

Source: Tourism Research Australia Local Government Area Profiles, 2019

Figure 8. Tourism statistics insights for Cardinia Shire – Travel party

	INTERNATIONAL	DOMESTIC OVERNIGHT	DOMESTIC DAY	TOTAL
UNACCOMPANIED	7,000	78,000	---	84,000
COUPLE	3,000	30,000	---	33,000
FAMILY GROUP	np	np	---	np
FRIENDS/RELATIVES TRAVELLING TOGETHER	np	np	np	np

Source: Tourism Research Australia Local Government Area Profiles, 2019

Figure 9. Tourism statistics insights for Cardinia Shire – Age group

	INTERNATIONAL	DOMESTIC OVERNIGHT	DOMESTIC DAY	TOTAL
15-34 YEARS	4,000	np	246,000	310,000
35-54 YEARS	np	np	231,000	np
55+ YEARS	4,000	39,000	288,000	331,000

Source: Tourism Research Australia Local Government Area Profiles, 2019

Figure 10. Tourism statistics insights for Cardinia Shire – Accommodation

	INTERNATIONAL	DOMESTIC OVERNIGHT	DOMESTIC DAY	TOTAL
HOTEL OR SIMILAR	np	np	---	np
HOME OF FRIEND OR RELATIVE	302,000	257,000	---	559,000
CARAVAN PARK	np	np	---	np
BACKPACKER	np	np	---	np
OTHER ACCOMMODATION	np	np	---	np

Source: Tourism Research Australia Local Government Area Profiles, 2019

Figure 11. Visits to farmgates in Australia – Year ending June 2019

	INTERNATIONAL	DOMESTIC OVERNIGHT	DOMESTIC DAY
VISITORS	375,000	321,000	383,000
EXPENDITURE	$2,189 million	$230 million	$52 million

Source: Tourism Research Australia Visit Farmgates (2016 onwards)

* Activities by domestic visitors are activities at location, whereas activities by international visitors are trip activities regardless of the location.

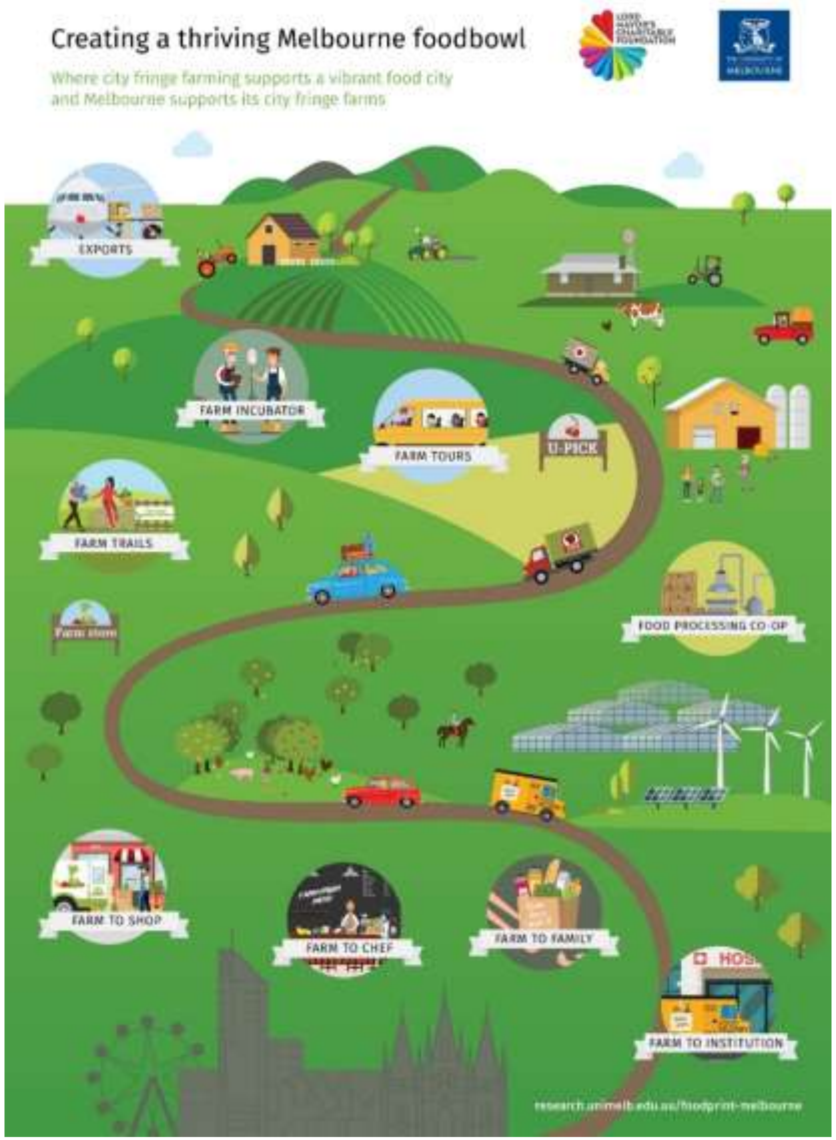
Figure 12. Visits to farms in Australia – Year ending June 2019

	INTERNATIONAL	DOMESTIC OVERNIGHT	DOMESTIC DAY
VISITORS	939,000	1,671,000	1,840,000
EXPENDITURE	$4,622 million	$747 million	$156 million

Source: Tourism Research Australia Visit Farms (Stopover Reason)

* Activities by domestic visitors are activities at location, whereas activities by international visitors are trip activities regardless of the location

APPENDIX 3. FOOD BOWL RELATIONSHIPS



Source: https://fvas.unimelb.edu.au/research/projects/foodprint-melbourne/publications/infographic-a-thriving-melbourne-foodbowl

APPENDIX 4. MARKETS AND PERSONAS

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WINERIES, BREWERIES, DISTILLERIES, FARMGATES

HEADLINE STATS FOR 2019

TRIPS
5.7 MILLION

NIGHTS
19.4 MILLION
3.4 NIGHTS PER TRIP

SPEND
$5.9 BILLION
$1,028 PER TRIP
$303 PER NIGHT

Australians took almost 6.8 million daytrips to the wineries, breweries, distilleries and farmgates spending $1.1 billion.

WHO ARE THEY?

- On average, 4.9% of domestic overnight visitors visited a winery, brewery, distillery or farmgate on their trip. This was higher among:
  - 30 to 34 year olds (6.3% of trips)
  - friends or relatives travelling together without children (8.1%) and adult couples (7.2%)
  - those who lived in capital cities (6.1%).
- Two-thirds (66%) were from intrastate.
- Older visitors (aged 55 and over) made up one-third of visitors (33%).

WHY DO THEY TRAVEL?

- Holiday travel was the largest driver of trips, making up 63% of trips.
- Those visiting friends and relatives were the second largest category (27%).
- Business travellers also enjoyed these activities, accounting for 8% of visitors.

WHERE AND WHEN DO THEY GO?

- The majority of visitors (82%) had their experience in a regional destination (4.7 million).
- February and August were low demand periods, accounting for 6% each of trips. High demand occurred in January, April and July, which was consistent with domestic travel patterns.
- Visitors were more likely to visit a winery, brewery, distillery or farmgate if they travelled to Tasmania (10.5% of visitors to the state had this experience), South Australia (10.4%) or Western Australia (8.8%).

HOW LONG DO THEY STAY?

- Average trip length was 3.4 nights.
- Those on interstate trips stayed longer, 4.1 nights compared to 3.0 nights for intrastate trips.
- Around 42% of trips were just 1 to 2 nights in length.

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WHERE DO THEY STAY?

- Visitors were more likely to stay in private accommodation such as the home of a friend or relative (29% of nights).
- In terms of commercial accommodation, hotels, motels and resorts were the most popular choice (25% of nights), followed by rented houses and apartments (15%) and caravan parks and camping grounds (11%).

HOW DO THEY GET THERE?

- While the majority of people who participated in these activities used car transport, 18% still travelled by air during their trip.

DESTINATION INFORMATION

2.7 million visitors got information from a direct internet search.
1 million visitors (18%) stay at the winery for 4-6 hours, 17% stay 2 hours.
3.1 million visitors do a wine tasting.
2.5 million purchase wine to take home.

WHAT DO THEY SPEND MONEY ON?

- The largest spend category was food and drink with $2.1 billion spent. Average spend per trip and per night was also much higher than the Australian average of $225 and $62, respectively.
- Accommodation accounted for a smaller portion ($1.5 billion).
- Airfares were a significant expense for those who travelled by air, at $591 per trip.

	Spend	Average spend per trip	Average spend per night
Food and drink	$2,113m	$397	$117
Accommodation	$1,493m	$547	$176
Domestic airfares	$571m	$591	$141
Petrol	$497m	$143	$43
Shopping, gifts and souvenirs	$410m	$202	$50
Tours	$313m	$994	$268
Total	$5,869m	$1,028	$303

WHAT DO THEY DO?

- Within this group, wineries were by far the most popular option, with 75% making this choice. Breweries (22%) were the next most popular.
- This cohort complemented their experience with other related activities, such as:
  - eating out at cafés or restaurants – 85%
  - going to pubs or clubs – 35%
  - visiting markets – 16%.
- They also engaged in outdoor and nature activities, with 31% going to the beach and 23% visiting a national park.

NEED MORE INFORMATION?

Email tourism.research@tra.gov.au for more data relevant to you region or sector.
We aim to help business by answering most requests free of charge.

Image: Courtesy of Tourism Australia

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NATIONAL PARKS AND BUSHWALKING

HEADLINE STATS FOR 2019

TRIPS	NIGHTS	SPEND
20.6 MILLION	80.8 MILLION 3.9 NIGHTS PER TRIP	$18.5 BILLION $895 PER TRIP $228 PER NIGHT

22 million Australians went on a day trip to a national park, spending $2.1 billion.

WHO ARE THEY?

- Around 18% of domestic overnight visitors travelled to a national park or went bushwalking. This was higher among:
  - → those aged 25 to 44 years of age (20% of visitors).
  - → those travelling with children (28% of family groups travelling together)
  - → those who lived in capital cities (20%).
- Adult couples made up 30% of domestic overnight visitors who went to a national park or bushwalked.

WHY DO THEY TRAVEL?

- Holiday travel was the largest driver, accounting for 69% of all overnight trips to a national park.
- Those visiting friends and relatives (VFR) were the second largest category, but just 12% of domestic VFR travellers went to a national park or did bushwalking compared to 31% of domestic holiday makers.

WHERE AND WHEN DO THEY GO?

- The majority of domestic trips involving these activities (81%) went to regional destinations (16.7 million trips). This accounted for 23% of all domestic overnight trips to regional Australia.
- Visitors were most likely to travel in summer and the school holidays, but demand still held up well through the rest of the year.
- Visitors were most likely to visit national parks or go bushwalking in the Northern Territory (38% of visitors) and Tasmania (35%).

HOW LONG DO THEY STAY?

- The average trip length for those visiting a national park or going bushwalking was 3.9 nights – this increased to 5.5 nights for interstate visitors.
- A significant proportion of trips (43%) were just 1 to 2 nights.

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WHERE DO THEY STAY?

- Those engaging in these activities were most likely to stay in private accommodation such as their own property, the home of a friend or relative or a private camping ground (51% of nights).
- The most common types of commercial accommodation were a hotel, motel or resort (19% of nights), caravan park or camping ground (14%) or a rented house or apartment (12%).

HOW DO THEY GET THERE?

- Most visitors (81%) drove to their destination, with 71% being intrastate travellers.
- Travel by air accounted for 16% of visitors.

DESTINATION INFORMATION

6.6 million did not look for destination information.
8.8 million used direct internet searches.
2.9 million relied on recommendations from friends and relatives.
922,000 visitors use a mapping website or app.

WHAT DO THEY SPEND MONEY ON?

- The largest spend category was food and drink, with spend of $5.8 billion.
- Domestic airfares was the largest expense for those who flew – $672 per trip.
- Accommodation spend was $5.0 billion or $112 per night for those who paid for accommodation.

	Spend	Average spend per trip	Average spend per night
Food and drink	$5.8b	$307	$77
Accommodation	$5.0b	$569	$136
Airfares	$2.0b	$672	$112
Petrol	$1.9b	$141	$37
Shopping, gifts and souvenirs	$1.1b	$192	$38
Tours	$1.0b	$1,020	$206
Total	$18.5b	$895	$228

WHAT DO THEY DO?

- Outside of traditional social activities such as eating out at a restaurant or café (69% of visitors), national parks and bushwalking visitors enjoyed nature and other free activities such as:
  - → sightseeing and looking around (43%)
  - → going to the beach (41%).
- Being active was important to visitors in this category, with 69% physically participating in bushwalking.

NEED MORE INFORMATION?

Email tourism.research@tra.gov.au for more data relevant to you region or sector.
We aim to help business by answering most requests free of charge.

Image: Courtesy of Tourism Australia

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TOURISM RESEARCH AUSTRALIA

VISITING FRIENDS AND RELATIVES

HEADLINE STATS FOR 2019

TRIPS
39.9 MILLION

NIGHTS
126.5 MILLION
3.2 NIGHTS PER TRIP

SPEND
$17.4 BILLION
$435 PER TRIP
$137 PER NIGHT

WHO ARE THEY?

- Just over one-third (34%) of all overnight trips were to visit friends and relatives (VFR).
- Those aged 55 years and over accounted for 38% of trips.
- Around 41% of trips were by those travelling alone, and a further 27% by adult couples.
- Most trips (81%) did not include children.

WHERE AND WHEN DO THEY GO?

- The majority of VFR trips (71%) included an intrastate destination, with only 30% extending to interstate.
- More trips included a regional destination (59%) than a capital city (43%).
- Most trips (89%) had only one destination.
- The most popular months were December and January, with a minor peak over Easter.
- Most trips ended on a Sunday (39%), with a further 18% ending on a Monday.

HOW LONG DO THEY STAY?

- Average trip length was 3.2 nights, although 60% of VFR trips were only 1 to 2 nights in length.
- Trips taken by people who were older and not working had an average length of 4.4 nights, and trips taken by people working full time had an average length of 2.7 nights.
- Out of those who used commercial accommodation, caravan and camping grounds had the longest average trip length at 3.6 nights. Standard hotels rated 3 stars and below had the shortest trip length of 2.1 nights.
- Trips ending in January had the longest average length of 4.6 days.

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WHERE DO THEY STAY?

- The majority of nights (80%) were spent in the property of a friend or relative.
- Of the small portion of nights in commercial accommodation, standard hotels rated 3 stars and below (5% of nights), and rented houses or apartments (4% of nights) were the most popular.

DESTINATION INFORMATION
Only 41% of visitors research their destination.
7.9 million use direct internet searches.
6.1 million rely on recommendations from friends and relatives.

HOW DO THEY GET THERE?

- Most VFR travellers drove to their destination, with 77% of trips including a self-drive vehicle. Flights were included in 18% of trips.

WHAT DO THEY SPEND MONEY ON?

- As expected, accommodation was not a major cost for VFR travellers, only accounting for 14% of all spend. The most common spend drivers were food and drink ($5.7 billion), flights ($2.8 billion), and petrol ($2.4 billion).
- While food and drink was a major expenditure item, 56% of this was spent on takeaway and restaurant meals and 23% was spent on groceries for self-catering.
- Trips that included flights had an average spend of $484 per trip on airfares.

	Spend	Average spend per trip	Average spend per night
Food and drink	$6.1b	$187	$56
Airfares	$3.0b	$489	$90
Accommodation	$2.5b	$408	$109
Petrol	$2.4b	$101	$33
Shopping, gifts and souvenirs	$1.8b	$191	$43
Total	$17.4b	$435	$137

WHAT DO THEY DO?

- Almost all VFR trips included social activities such as eating out (59%), sightseeing (22%), going to pubs, clubs, and discos (22%) and shopping (21%).
- Popular outdoor activities included going to the beach (22%), visiting national/state parks (8%) and bushwalking (8%).

NEED MORE INFORMATION?
Email tourism.research@tra.gov.au for more data relevant to you region or sector.
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Image: Courtesy of South Australian Tourism Commission

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TOURISM RESEARCH AUSTRALIA

ADULT COUPLE

HEADLINE STATS FOR 2019

TRIPS
28.3 MILLION

NIGHTS
107.8 MILLION
3.8 NIGHTS PER TRIP

SPEND
$20.4 BILLION
$722 PER TRIP
$189 PER NIGHT

WHO ARE THEY?

- Over half were 55 years of age or older (53% of trips). Those aged 20 to 29 took a further 15% of trips.
- Over half were capital city residents (53%), while 47% were from regional Australia.
- One-fifth of trips were taken by couples with an annual household income of over $200,000.

WHY DO THEY TRAVEL?

- Adult couples mainly travelled for leisure, with 54% of trips taken for a holiday, and 38% to visit friends and relatives.
- Out of those couples travelling for a holiday, 8% did so to attend an event—sporting, cultural, or festival.
- Only 5% of trips were for business.

WHERE AND WHEN DO THEY GO?

- Two-thirds of trips included a regional destination with a longer average trip length of 3.9 nights.
- Intrastate destinations made up 73% of trips.
- Most trips only included a single destination (87%).
- Trips were relatively even distributed across the year, with minor peaks during the Easter and Christmas breaks, including January.
- Over one-third (37%) of trips ended on a Sunday and a further 18% on a Monday.

HOW LONG DO THEY STAY?

- Average trip length was 3.8 nights, with 56% of trips being just 1 to 2 nights long.
- Older non-working travellers generally have more free time. This was reflected by an average trip length of 5.5 nights. However, their average spend per night was $129 compared with an average of $189 across all adult couple travellers.
- Trips that included interstate destinations had an average trip length of 5.9 nights compared with 2.8 nights for intrastate travel.

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WHERE DO THEY STAY?

- Commercial accommodation accounted for 47% of nights. The most common types included:
  - caravan and camping grounds (14% of nights)
  - standard hotels below 4 stars (11% of nights)
  - luxury hotels, 4 and 5 stars (9% of nights).
- Nearly one-third (31%) of nights were spent at the property of a friend or relative.

DESTINATION INFORMATION
52% of travellers researched their trip. 32% used direct internet searches. 10% relied on recommendations from friends and relatives.

HOW DO THEY GET THERE?

- Most couples (84%) drove to their destination, while 16% took a flight.

WHAT DO THEY SPEND MONEY ON?

- Couples spent most of their money on food and drinks ($6.3 billion) and accommodation ($5.0 billion).
- While the average spend on accommodation was $107 per night, those who stayed in hotels spent $187 per night.
- Those travelling by air spent $624 on flights.

	Spend	Average spend per trip	Average spend per night
Food and drink	$6.3b	$259	$68
Accommodation	$5.0b	$464	$107
Petrol	$2.1b	$120	$32
Airfares	$2.1b	$624	$115
Shopping	$1.8b	$250	$49
Entertainment	$0.8b	$175	$32
Total	$20.4b	$722	$189

WHAT DO THEY DO?

- Most couples engaged in social activities such as eating out (70%), visiting friends and relatives (48%), sightseeing (34%), going to pubs, clubs, and discos (26%) and shopping (22%).
- Popular outdoor activities included going to the beach (29%) and bushwalking (16%).
- Couples also visited museums or galleries (10%).

NEED MORE INFORMATION?

Email tourism.research@tra.gov.au for more data relevant to you region or sector.
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Image: Courtesy of Tourism Australia

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TOURISM RESEARCH AUSTRALIA

OLDER NON-WORKING TRAVELLERS

HEADLINE STATS FOR 2019

TRIPS
19.4 MILLION

NIGHTS
99.1 MILLION
5.1 NIGHTS PER TRIP

SPEND
$12.2 BILLION
$630 PER TRIP
$123 PER NIGHT

WHO ARE THEY?

- Older non-working travellers accounted for 17% of all domestic overnight trips, and 24% of all domestic nights.
- Nearly half (46%) travelled as part of an adult couple, while 30% travelled alone and 19% travelled with friends and relatives.
- Half of all trips were taken by travellers living in capital cities and half from those living in regional Australia.

WHY DO THEY TRAVEL?

- Most travelled for leisure with 48% of trips to visit friends and relatives – 38% of trips were to visit relatives alone.
- Holiday travel accounted for 42% of visitors.

WHERE AND WHEN DO THEY GO?

- Trips were fairly evenly distributed throughout the year, with April the most popular travel month. Trip volumes dipped slightly in winter months.
- Nearly one-quarter of all trips (23%) ended on a Sunday, and a further 18% on a Monday.
- Three-quarters of trips (75%) were intrastate with only 29% including interstate destinations.
- Around two-thirds of trips (65%) included regional destinations and 42% included capital cities.
- Most trips (85%) were to just one destination.

HOW LONG DO THEY STAY?

- Average trip length was 5.1 nights, substantially longer than for domestic travellers overall (3.6 nights).
- Around 45% were 1 to 2 nights in length.
- Trips that included interstate destinations had an average trip length of 8.3 nights.

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WHERE DO THEY STAY?

- Around two-thirds of trips (64%) were spent in private accommodation, including 40% of nights at a friend or relative's property and 7% in their own property.
- Commercial accommodation accounted for 38% of nights.
- Frequently used commercial accommodation included caravan and camping grounds (14% of nights), standard hotel below 4 stars (9%) and rented houses and apartments (6%).

DESTINATION INFORMATION
These travellers were less likely than other travellers to use online platforms.
19% used direct internet searches.
10% relied on recommendations from friends and relatives.

HOW DO THEY GET THERE?

- Most travellers opted to drive themselves (81% of trips).
- Only 15% of trips included flights, although these trips were on average longer – 6.4 nights verus 4.5 nights for self-drive.

WHAT DO THEY SPEND MONEY ON?

- Older non-working travellers were more budget-conscious than other traveller types, spending on average $123 per night compared with $215 for others.
- Most of their money was spent on food and drink ($3.5 billion) and accommodation ($2.9 billion). Travellers spent on average $499 per trip on a place to stay ($79 per night). Those who stayed in caravan parks and commercial camping grounds spent on average $459 on accommodation ($53 per night).
- A total of 661,000 trips included tours, with an average spend of $1,517.
- Those travelling by air spent $556 on flights.

	Spend	Average spend per trip	Average spend per night
Food and drink	$3.5b	$222	$42
Accommodation	$2.9b	$499	$79
Petrol	$1.4b	$121	$25
Airfares	$1.2b	$556	$63
Tours	$1.0b	$1,517	$201
Total	$12.2b	$630	$123

WHAT DO THEY DO?

- Most travellers engaged in social activities such as eating out (64%), visiting friends and relatives (58%), sightseeing (32%), going to a pub or club (22%) and shopping (22%).
- Popular outdoor activities included going to the beach (22%), visiting national parks (11%) and bushwalking (11%).
- The most popular cultural activity was visiting museums and galleries (11%).

NEED MORE INFORMATION?
Email tourism.research@tra.gov.au for more data relevant to you region or sector.
We aim to help business by answering most requests free of charge.

Image: Courtesy of World Expeditions / Great Walks of Australia

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TOURISM RESEARCH AUSTRALIA

FAMILIES WITH CHILDREN

HEADLINE STATS FOR 2019

TRIPS
17.0 MILLION

NIGHTS
62.3 MILLION
3.7 NIGHTS PER TRIP

SPEND
$14.2BILLION
$836 PER TRIP
$228 PER NIGHT

WHO ARE THEY?

- Around half of adults travelling with children were aged between 35 and 49.
- Females accounted for almost 60% of trips.
- Capital city residents accounted for 56% of travellers, while 44% lived in regional Australia.
- Nearly one-quarter of trips (24%) were undertaken by those with an annual household income of over $200,000.

WHY DO THEY TRAVEL?

- Families were more likely to travel for the purpose of a holiday (57% of trips).
- Over one-third (36%) travelled to visit friends and relatives (VFR).
- Holiday visitors stayed longer than VFR (3.9 nights compared to 3.1 nights).

WHERE AND WHEN DO THEY GO?

- The majority of trips (90%) included only one destination.
- Families preferred to travel to regional Australia over capital cities, with 68% of nights spent in regional destinations. Families also stayed slightly longer in regional destinations, but spent less ($810, compared to $1,090 in capital cities).
- Trips taken by families coincided with school holidays, peaking with the Christmas and Easter holiday periods. The seasonality was more pronounced than for other traveller types.

HOW LONG DO THEY STAY?

- Average trip length was 3.7 nights, with 52% of trips being just 1 or 2 nights.
- Notable exceptions included the Northern Territory and Australian Capital Territory – 6.4 nights and 2.4 nights respectively.
- Trips ending on a Sunday accounted for 40% of those taken, while a further 18% ended on a Monday.

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WHERE DO THEY STAY?

- 36% of nights are in a friend or relative's house.
- Nearly half of nights (49%) were spent in commercial accommodation. The main accommodation types included:
  - hotels and equivalent – 21% of nights.
  - rented house or apartment – 13%.
  - caravan park or commercial camping ground – 13%.

DESTINATION INFORMATION

57% of travellers researched their destination.
38% used a direct internet search.
11% relied on recommendations from friends and relatives.

HOW DO THEY GET THERE?

- Families prioritised time, convenience, and value for money when travelling. Most chose to drive (86%) instead of fly (14%), which makes intrastate travel more viable than interstate (74% of trips were intrastate).

WHAT DO THEY SPEND MONEY ON?

- Average spend remained higher as families consist of multiple people.
- Families spent most of their money on food and drink (31% share), accommodation (28% share), and airfares (10% share).
- Those who used commercial accommodation spent an average of $638 on accommodation – or $154 per night.
- Those travelling by air spent $894 per trip on flights.

	Spend	Average spend per trip	Average spend per night
Food and drink	$4.5b	$308	$80
Accommodation	$3.9b	$638	$154
Airfares	$1.5b	$894	$147
Shopping, gifts, souvenirs	$1.2b	$229	$47
Entertainment	$0.8b	$222	$44
Total	$14.2b	$836	$228

WHAT DO THEY DO?

- Most trips (91%) included social activities such as eating out at restaurants or cafés (65% of trips), visiting friends and relatives (47%) and sightseeing (32%).
- Outdoor nature was popular (59% of trips), including going to the beach (41% of trips) and visiting national and state parks (19% of trips).
- Over one-quarter (28%) visited local tourist attractions including wildlife parks, zoos, and aquariums (6% of trips) and amusement parks (5%).

NEED MORE INFORMATION?

Email tourism.research@tra.gov.au for more data relevant to you region or sector.
We aim to help business by answering most requests free of charge.

Image: Courtesy of Tourism Australia

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SHORT STAY VISITORS (1 to 2 NIGHTS)

HEADLINE STATS FOR 2019

TRIPS
66.8 MILLION

NIGHTS
98.5 MILLION
1.5 NIGHTS PER TRIP

SPEND
$26.7 BILLION
$399 PER TRIP
$271 PER NIGHT

WHO ARE THEY?

- Length of stay was just 1 to 2 nights for 57% of all overnight trips.
- Over half (54%) were capital city residents, while 46% were from regional Australia.
- The ages of short-stay visitors were distributed evenly between 20 and 60 years. The number of short trips taken by those aged over 60 years dropped as age increased, with older travellers preferring longer trips.
- Over one-third of visitors (37%) travelled alone, 24% travelled as part of an adult couple, and 16% as friends or relatives travelling together.

WHY DO THEY TRAVEL?

- Most trips were for leisure, with 36% to visit friends and relatives and 35% for a holiday.
- Nearly one-quarter of short trips (23%) were for business.

WHERE AND WHEN DO THEY GO?

- Over three-quarters of trips (77%) included an intrastate destination, with only 24% extending to interstate.
- Regional destinations were included in 59% of trips, while 41% included capital cities.
- Short-stay trips did not display much seasonality and were roughly uniform throughout the year, particularly when compared with longer trips that favoured public and school holiday periods.
- Trips were generally skewed to the weekend, with 41% finishing on a Sunday.

WHERE DO THEY STAY?

- The property of friends or relatives accounted for 39% of nights.
- Commercial accommodation accounted for 45% of nights.
- Popular commercial options included standard hotels below 4 stars (18% of nights), luxury hotels 4 star and above (13%) and a rented house or apartment (6%).

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HOW DO THEY GET THERE?

- Over three-quarters of short-stay visitors (78%) drove to their destination, and only 16% included flights.
- Business travel was the exception, accounting for 64% of all short trips that included flights. This was due to 46% of business trips including an interstate destination and 54% including a capital city.

DESTINATION INFORMATION
17 million used direct internet searches.
5.8 million relied on recommendations from friends and relatives.

WHAT DO THEY SPEND MONEY ON?

- Short-stay travellers spent most of their money on food and drinks ($7.4 billion), accommodation ($6.0 billion) and flights ($4.2 billion).
- Short-stay trips that included commercial accommodation had an average spend of $177 per night, which was significantly higher than the national average of $125 per night. Hotels, motels and resorts contributed to this with short-stay visitors spending $195 per night on this accommodation.
- Those who flew spent on average $514 on airfares per trip.

	Spend	Average spend per trip	Average spend per night
Food and drink	$7.4b	$135	$90
Accommodation	$6.0b	$263	$177
Airfares	$4.2b	$514	$333
Petrol	$3.5b	$93	$63
Shopping	$2.2b	$202	$127
Total	$26.7b	$399	$271

WHAT DO THEY DO?

- Although short-stay travellers engaged in a variety of activities, their short trip length meant they did so to a lesser extent than other visitor types.
- Popular social activities included eating out (59%), sightseeing (20%), going to pubs and clubs (20%), visiting friends and relatives (45%) and shopping (14%).
- Popular outdoor activities included going to the beach (18%) and visiting national parks (9%).

NEED MORE INFORMATION?

Email tourism.research@tra.gov.au for more data relevant to you region or sector.
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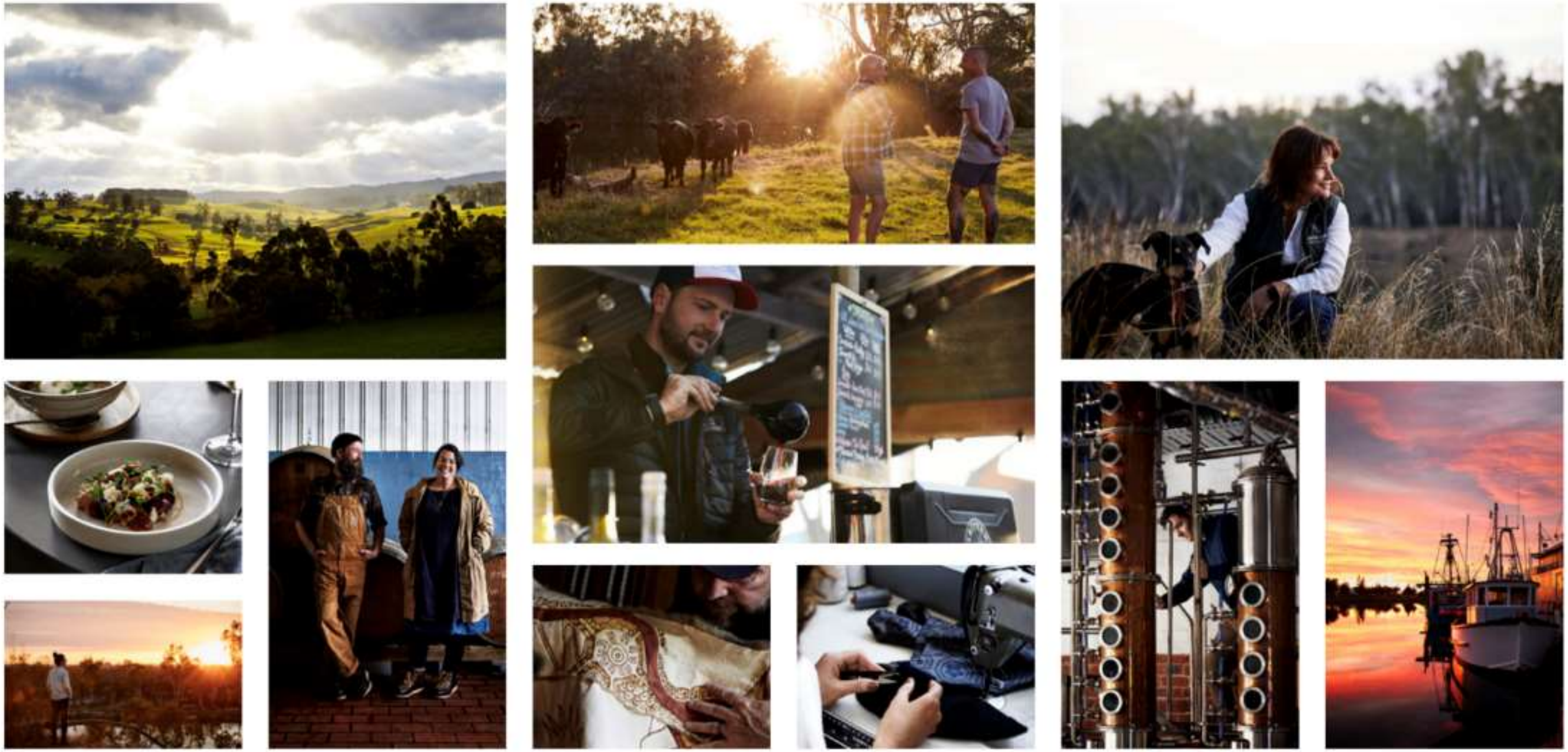
Image: Courtesy of Tourism Australia

APPENDIX 5. DESTINATION AND MAKER AND CREATOR CONTENT EXAMPLES



The above image examples are a snapshot of the types of destination and maker and creator content that Visit Victoria will develop throughout the campaign.

Source: Visit Victoria

APPENDIX 6. CASE STUDIES

Eat Local SA

Eat Local SA is hosted and managed by Food South Australia Inc. with funding support from the Government of South Australia.

Eat Local SA promotes venues who make the effort to source and sell South Australian food and beverage products and hero these products and suppliers on their menus and shelves. It is a great initiative for consumers to support both South Australian food producers and the food service industry by dining at venues which actively choose to include local produce on their menu.

Participation in Eat Local SA is open to restaurants, pubs, cafes, cellar doors, caterers, specialty gourmet retailers, and South Australian food-focused tourism and accommodation businesses. Eat Local SA can help attract visitors hungry for new culinary tourism experiences, and who are eager to seek out the stories behind great food.

There's no fee to participate in Eat Local SA – participating businesses are simply asked to ensure any consumers visiting the business can easily (and always) see that a consistent effort is made to support local producers.

All participants receive a free all-weather sign or sticker and the Eat Local SA logo to use on their website and promotions to make the most of the program's established brand.

This concept is different to The Best Bites program in nearby Mornington Peninsula, which celebrates excellence in food businesses across the areas of nutrition, accessibility, waste management, water and energy saving, along with going smoke free and alcohol management.

Rather, the Eat Local concept is a visual drawcard for visitors to understand that they have the opportunity to eat and purchase local produce.

Figure 13. Eat Local SA logo

Source: https://eatlocalsa.com.au/

Trailhopper

Hop-on, hop-off concept where a bus collects passengers from a convenient CBD location in the morning and then once again out in the region (for example, once in the Adelaide CBD and then once again in the Barossa).

The bus follows a recurring timetable circuit that takes 50-60 minutes to complete, visiting all 10-15 of the selected venues. The bus follows this same timetable each and every hour until it's time to return to the city in the late afternoon. A 21-seat Toyota Coaster type vehicle is used for passenger comfort.

A different in-region fare allows visitors to embark anywhere within the region itself, rather than paying the normal fare from the CBD.

Along the way visitors are free to hop on or off at any of the established stops, so that in a full day tour they are likely to see up to four wineries of their choosing, at their own pace, and independently from the other groups on the bus.

It is not a guided tour, however information about the tour, region and the timetables are provided beforehand through information packs.

Retail prices are from $59.95 per person based on an in-region pickup and $69.95 per person based on a CBD pickup.

Figure 14. Sample hop-on, hop-off timetable

Barossa Valley Timetable

Pick up only

DEPART CITY	09:35				
Visitor Information Centre (Tanunda)	10:50				
Grant Burge Wines	10:58	11:58			
St Hallett Wines	11:05	12:05	13:05		
Bethany Wines*	11:14	12:14	13:14	14:14	
Rusden Wines	11:20	12:20	13:20	14:20	15:20
Lambert Estate	11:29	12:29	13:29	14:29	15:29
Yalumba Winery	11:36	12:36	13:36	14:36	15:36
Angaston Township		12:41	13:41	14:41	15:41
Saltram Wines		12:44	13:44	14:44	15:44
Provenance Barossa (includes Penfolds)			13:52	14:52	15:52
Kaesler Winery			13:55	14:55	15:55
Maggie Beer Farm Shop				15:00	16:00
Tanunda Town Centre				15:10	16:10
DEPART REGION	16:10				
ARRIVE CITY	17:30				

* Not available until 1pm on Sundays

Source: https://trailhopper.com.au/

The Farm, Byron Bay

The Farm is an 80-acre working farm which is home to a community of growers, producers, eateries, and educators who share a passion for growing food using traditional and sustainable methods that are spray and chemical free.

Visitors can see how a farm operates, supports the environment and contributes to a healthier lifestyle. Their motto is to 'grow, feed, educate'.

The site consists of the farm, growers collective market garden, plant nursery, local produce store, bakery, coffee hub, restaurant and online store. They provide walking farm tours, farming workshops for adults, horseback tours, farm-themed activities, workshops for children and a playground. There are three types of livestock on the farm – beef, poultry and pigs.

There is a free self-guided tour with accompanying map, interpretive signage and an option for children to use a 'passport' to tick off locations and sights around the property. Some of the children's activities also include mini-farmer program, pigs workshop, beneficial bugs workshop, seed workshop, bee workshop, chicken workshop, medicinal herbs workshop and flower workshop. These are rotated during the school holidays and over weekends.

The Farm have also partnered with Landcare in a regeneration project to plant over 2500 local native trees, shrubs and grasses along the creek bordering the property. Planting native species, controlling weeds and fencing the project area to restrict cattle access is intended to help reverse degradation, encourage a diversity of wildlife, reduce erosion and improve water quality which will limit weed infestations downstream.

The Farm community has now grown to include:

- Three Blue Ducks – restaurant
- The Bread Social – bakery
- The Produce Store – local produce
- Growers Collective – market garden
- Baylato – gelato
- Poppy & Fern – florist
- Wormticklers – nursery
- Farm Kids – activities
- Workshops – adult farming
- Zephyr Horses – private horseback tours
- Brooklet Springs Farm – animals
- Oliver's Hens.

Figure 15. Map of The Farm

Source: https://thefarm.com.au

Olive Bus, Clare Valley

Stone Ridge Olives is a small family run olive grove in the Clare Valley producing extra virgin olive oil. They have turned a 1969 British Leyland bus into a modern café / kitchen that serves delicious, locally made food and beverages.

The bus is permanently parked under a custom-made bus shelter with fantastic views across the olive grove and the surrounding vineyards. It is popular shady spot in summer and offers a log fire and blankets for winter visits.

The vision for the Olive Bus was to create a unique spot showcasing local produce and home cooking that would be a 'must do' on a Clare Valley food trail itinerary and encourage visitors to return time and time again.

Recently, it has been expanded to include a licensed cellar door and the venue is now hosting pizza nights and music events on Friday, Saturday and Sunday nights.

Figure 16. The Olive Bus

Source: https://www.facebook.com/olivebusclare/

Nyanggan Gapi Café, Coffs Harbour

A social enterprise managed by Bularri Muurlay Nyanggan Aboriginal Corporation, the Nyanggan Gapi Café is located at Sealy Lookout within Orara East State Forest.

100% of profits from Nyanggan Gapi café & Catering go towards their core programs including after school learning centres and language revitalisation.

The café offers something unique for locals and visitors by incorporating native flavours into the food, such as lemon myrtle. The café also sources its coffee locally with the help of Artisti Coffee Roasters.

The concept was launched during NAIDOC week in 2017 and also provides training and employment opportunities for the young people engaged in their programs.

Trading from 8:30am to 2pm, Wednesday to Sunday each week.

Figure 17. Nyanggan Gapi Cafe

Source: https://www.coffscoast.com.au/operator/nyanggan-gapi-cafe/

‘Around Hermitage Wine and Food Trail’, Hunter Valley

Only 2 hours from Sydney via the Hunter Expressway.

Visitors are encouraged to follow the “RED” trail along this north-western area of Pokolbin boasting some of the best scenery and the most awarded boutique wineries and restaurants in the Valley. Stay here in one of the wide-ranging accommodation options just a stone’s throw from concert and wedding venues, an art gallery and sculpture garden, antiques and locally made produce.

Additionally, the area offers boutique beers, cheese tasting, golf, cycling, wine and cooking schools, wine tasting tours, horse and carriage tours, horse riding, hot air ballooning and day spas.

The catalyst for the formation of the Around Hermitage Association Incorporated was a magazine published by the NSW Wine Industry Association called “NSW Wine & Food Trails” which promoted the various wine regions within NSW. Within each region, wineries, and associated businesses, were grouped together in geographic areas to form “Trails” that customers could follow.

These “Trails” didn’t need to be circuits (i.e., starting and ending at the same point) but were just a means of grouping businesses together in a way that would make it easy for visitors to travel from place to place.

Figure 18. Hermitage Wine and Food Trail Map

Source: https://www.aroundhermitage.com.au/hunter-valley-map/

Businesses in the area were approached by the Hunter Valley Vineyard Association, who were acting as coordinator for the NSW Wine Industry Association in this area, to join together to form a "Trail".

One of the first decisions that the group needed to make was to name the "Trail". After many suggestions it was decided to use the mountain range, which is a backdrop to the area: hence The Brokenback Trail – note "wine" was not included as this was implicit in all the "Trails".

It was realised that the grouping of businesses could be advantageous in other areas apart from just the NSW Wine Industry Association magazine so it was decided to meet together on an ongoing basis to promote the area. In order to formalise the structure of the group a non-profit association was formed and to limit the liability of members it 'was decided to incorporate this association.

In 2006 as decision was made to change the name of the association to Around Hermitage, as it was felt that this better represented the area.

This active business and social neighbourhood group has over 70 businesses including cellar doors, accommodation, restaurants and attractions and over 30 social members. Social membership is $70 per annum. Business membership is from $295 per annum. Both types of memberships offer a number of marketing and promotion, community, and social benefits.

The Central Coast Plateau Harvest Trail, Central Coast

The Central Coast Plateau Chamber of Commerce (CCPCC) manages the Central Coast Plateau Harvest Trail. The trail is made up of around a dozen agritourism operators centred around Tourist Drive 33.

An online interactive map is available, with farmgates, retail and other businesses separately colour coded.

Website visitors can navigate by:

- Visit a farm
- Pick your own
- Visit a market
- Dine, celebrate, stay
- Find a food region
- Find an event
- Towns and villages
- Trip planner tours.

The Chamber works with Harvest Trails & Markets Inc which acts as an umbrella organisation for six harvest trails located in the Southern Highlands, Penrith, South Coast, Hills to Brooklyn, and Wollondilly. Harvest Trails and Markets Inc. is operated by Hawkesbury Harvest Inc., a not-for-profit association of farmers, artisanal producers, health and agri-industry development professionals who are passionate about retaining agriculture around our major cities. It aims to bridge the gap between growers and eaters, raise awareness of the challenges facing farmers, and reconnect city and country.

The CCPCC has been actively promoting the Central Coast Plateau Region to local and state governments seeking endorsement and financial support for trail development and marketing. Except for the

Central Coast, all the other harvest trails were initiated with local government support of between $10,000 and $20,000.

Importantly producers involved in the Harvest Festival reported significant increases in the number of visitors on the Harvest Trail during the festival period.

The Central Coast Harvest Festival is an annual event held on the June long weekend. The festival offers live music, free entertainment and celebrates local produce from around the Central Coast region. Festival attendees can follow the event trail through Dooralong, Jilliby, Yarramalong, Kulnura, Mangrove Mountain, Peats Ridge, Somersby and Calga. Attendees can visit local farms, attend workshops, pick their own fruit and visit different event hubs.

The number of visitors attending the festival has been growing each year since its establishment. In 2019 the event attracted over 32,000 attendees and injected $8 million into the region.[33] In 2018 the festival attracted over 16,000 people, up 60% from the inaugural 2017 event, and injected $3.7 million into the Central Coast economy. The Harvest Festival is supported by Destination NSW and is promoted on the Visit NSW website.

A significant consideration is the alignment of the Harvest Festival with the growing and harvest season in the region. The structured nature of the event places pressure on the producers to meet the expectations of visitors. Collaboration to ensure this type of event aligns with the produce season that suits both the tourism sector and the primary producers is likely to generate greater benefits for a region.

[33] https://www.centralcoast.nsw.gov.au/council/news/media-releases/bumper-harvest-festival-delivers-8million-economic-boost

Figure 19. Central Coast Plateau Harvest Trail Logo

Source: https://www.harvesttrailsandmarkets.com.au/

Scenic Rim, QLD

While the region was located within close proximity of the Gold Coast and Brisbane, it had significant agriculture and some emerging tourism offerings, there had been little focus on connecting the two sectors. To complicate matters, Scenic Rim was an amalgamation of three local government areas resulting in three different planning instruments. The complex nature of the local government approval process had exacerbated an already difficult situation faced by farmers looking to diversify and value add.

The challenge was to help government, community and the farming sector see the potential of agritourism and actively support its development.

In 2010, the Scenic Rim Regional Council and Tourism & Events Queensland jointly funded a business development program and local food strategy aimed at growing the breadth of agritourism experiences and increasing landholder financial yield, with economic, social and environmental benefits for the region.

Ten businesses completed the program; a core group of regional stakeholders developing a range of authentic tourism products and experiences based on the people, place, landscape and culture of the Scenic Rim. The program directly created five full-time and more than 16 part-time jobs and led to more than $1.6 million investment in new or upgraded product.

The outcome highlights what can be achieved by linking agriculture and tourism. From a tourism perspective, the program created products and experiences necessary for the industry's growth and development. From an agricultural perspective, it provided opportunities for value-adding, diversification, and greater viability. Regionally, it served to become an embryonic seed – a valuable early first step in the Scenic Rim's evolution as an authentic tourism destination and a more resilient and dynamic award-winning regional food producing economy.

NSW Government Agritourism Pilot Project – 2018

The NSW Government's Agritourism Pilot Project sought to define agritourism and to explore how government could support sector growth. The agritourism project is a partnership between Service NSW, the NSW Small Business Commission (NSWSBC) and the NSW Department of Planning, Industry and Environment (DPIE). The objective is to make it easier for farmers to start, run and grow an agritourism business

The objectives of the project were to:

- Allow small scale agritourism and commercial uses relating to agricultural use of the land to encourage innovation
- Support innovation on farm through value adding and diversification to compliment agricultural production and land use
- Provide greater clarity by defining agritourism and simplify planning requirements through a standardised framework
- Minimise land use conflict with current and future farmers and
- Make it easier for farmers to understand the planning pathway.

Business development support was being offered to selected farmers in three local council areas: Liverpool Plains, Queanbeyan-Palerang and Wollondilly (the 'pilot' councils). The support was offered by regional tourism business development consultancy Regionality via a series of workshops.

Service NSW mapped the experience of farmers who were trying to start, run and grow agritourism businesses, and identified key pain points and potential solutions to problems. This was done through qualitative research and collaborative workshops.

There were several learnings from the pilot that are relevant to West Gippsland seeking to support agritourism. These include, but are not limited to:

- Agritourism has significant potential as a mechanism to support farmers to innovate, diversify and value add
- Agritourism is not well understood and not clearly defined in both business and planning terms
- Regulatory reform is required to support sector development as the current system is complex, costly, complicated, confusing and open to interpretation
- Agritourism is different from other forms of tourism or even rural tourism, as it is an adjunct or value add to primary production, therefore there are other factors such as biosecurity, farm and livestock management and the safety of visitors who on farm
- Farmers need support to understand the opportunities and how to integrate agritourism in a way that compliments their farming, without compromising the productive capacity of the land
- Each farm, farmer and region have a different context, requiring bespoke solutions to support innovation that is suitable for them. Simply providing generic information does not necessarily support traditional farmers to understand the opportunities or the agritourism development pathway.
- All three components of the pilot program, capacity building/business development, regulatory reform and improved access to information are required to support agritourism development in a region. Capacity building programs help support viability of agritourism clusters

DPIE prepared an Explanation of Intended Effect (EIE) for public comment, with a view to introduce proposed reforms. These may include changes to farm stay accommodation and clearer terms to enable small scale farm gate activities and on farm tours and events.

West Gippsland

PROGRESS ASSOC