

**Report to the Future Melbourne (Economic Development)  
Committee**

Agenda item 6.4

**Draft City of Melbourne Tourism Action Plan 2015–2018**

14 July 2015

**Presenter:** Barry McGuren, Manager Business and Tourism Melbourne

**Purpose and background**

1. The purpose of this report is to seek endorsement of the draft City of Melbourne Tourism Action Plan 2015–18 (refer Attachment 2), prior to commencing a targeted external stakeholder consultation.
2. The draft Tourism Action Plan 2015–18 (the Plan) sits under the *Building Prosperity Together* economic development framework and is a Council Plan year two action 3.3.1: *From the Economic Development Framework, identify two key priority areas and develop/deliver business improvement activities.*

**Key issues**

3. The Plan outlines a number of actions that will support the growth of the visitor economy in the city.
4. The Plan's central ambition is that visitors have the best possible experience in the city during their stay in Melbourne, and that the visitor economy benefits local businesses and the community.
5. The Plan seeks to complement the Victorian government's ambition of growing the Victorian Visitor Economy. In particular, the Plan highlights the importance of a formal, active Team Melbourne approach to developing and marketing Melbourne as a destination for visitors, business events, international students and major events, particularly from the growing Asian visitor markets.
6. The Plan acknowledges the Council's capital city and regional gateway roles as well as its focus on achieving the best possible outcomes for the municipality.
7. The actions in the Plan are structured in line with the five key stages of Visitor Information Journey: planning and booking; travel to the destination; on arrival; in the destination; and departure / return home.
8. It outlines the goals, expected outcomes and proposed actions for each of the five stages. It also identifies the partners Council seeks to work with in order to achieve these outcomes.
9. External stakeholder consultation will commence once the Committee has approved release of the Plan in its draft form. Following consultation, the final Plan will be submitted to the Council in October 2015. The Plan will assign a year, or multiple years to deliver actions, include an implementation plan and a process for annual reporting on progress.
10. Implementation of year one of the four-year Plan is a Council Plan year three action. Pending final approval by Council, implementation will commence by the end of 2015.
11. The year one cost will be absorbed within the 2015-16 budget. Implementation of years two, three and four will be considered as part of the annual business and budget planning.

**Recommendation from management**

12. That the Future Melbourne Committee:
  - 12.1. Approves the release of the draft City of Melbourne Tourism Action Plan 2015–18 for consultation with key external stakeholders.
  - 12.2. Authorises the Director City Economy and Activation to make any further minor editorial changes to the draft City of Melbourne Tourism Action Plan 2015–18 prior to publication.

**Attachments:**

1. Supporting attachment
2. Draft Tourism Action Plan 2015–18

## Supporting Attachment

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### Legal

1. There are no legal implications arising from the recommendation from management.

### Finance

2. There are no additional financial implications outside the approved 2015–16 budget.

### Conflict of interest

3. No member of Council staff, or other person engaged under a contract, involved in advising on or preparing this report has declared a direct or indirect interest in relation to the matter of the report.

### Stakeholder consultation

4. External stakeholder consultation will commence once the Committee has approved release of the Plan in its draft form.

### Relation to Council policy

5. This recommendation is consistent with the City of Melbourne Building Prosperity Together economic development framework.

### Environmental sustainability

6. The Plan leverages the city's reputation for sustainable practices and aims to make it easy for visitors to walk, cycle and use public transport while they are in Melbourne.

# CITY OF MELBOURNE

## TOURISM ACTION PLAN 2015–2018

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## 1. FOREWORD

Melbourne welcomes visitors. A city of energy, sophistication and innovation with a proud history and culture, Melbourne loves to share its story with travellers from other parts of Australia and from all over the world. With wide tree-lined streets, many parks and gardens, major cultural and sporting events and accessible community services, there is a lot to love about Melbourne.

The traditional owners of the Kulin Nation, a place now known by its European name of 'Melbourne', are the Wurundjeri, Boonwurrung, Taungurong, Dja Dja Wurrung and the Wathaurung people. Melbourne has always been – and continues to be – an important meeting place and location for social, educational, sporting and cultural events and activities.

Melbourne's appeal has many sources. It is in the memory of experience built around the city's distinctive physical characteristics: an unusual street and laneway network, the Yarra River, parks and gardens, trams, beautiful heritage buildings and contemporary structures.

And Melbourne has topped the Economist Intelligence Unit (EIU) Global Liveability Index for the past four years – making it the world's most liveable city<sup>1</sup>.

Tourism is a priority area of focus for the City of Melbourne given its important contribution to job creation and economic growth. In 2012 and 2013, the tourism sector contributed an estimated \$8.5 billion to the Greater Melbourne economy. Research by Deloitte<sup>2</sup> has forecast that tourism is one of the five growth industries for Victoria and Melbourne in the next 20 years. The City of Melbourne municipality received an estimated 10.9 million visitors to the year ending September 2014, including 1.4 million international overnight visitors<sup>3</sup>. These visitors are tourists, business travellers, international students and their families, interstate visitors and many Victorians.

The City of Melbourne's significant investment in tourism – around \$45 million for business facilitation and international activity, small business grants and events, city promotion and tourism – has had a profound impact on Melbourne's profile, both locally and internationally. The *City of Melbourne Tourism Action Plan 2015–2018* has been developed to articulate our vision for tourism in the City, our roles in the industry, and the actions we'll take to ensure visitors have a positive experience and contribute to the local economy.

The Plan is structured around five key stages in the visitor information journey: journey planning, travel to the destination, arrival, experiences during the stay, and departure and reflection.

This Plan will help Melbourne to continue to deliver a unique, surprising and diverse experience for visitors in an historical, culturally rich and sustainable environment. It will help us stay on track so that tourism continues to contribute to Melbourne's economic and social prosperity and its international recognition as the world's most liveable city.

**Robert Doyle**  
Lord Mayor

**Councillor Kevin Louey**

**Councillor Beverley Pinder-Mortimer**

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<sup>1</sup> *Global Liveability Ranking and Report August 2014*, the Economist Intelligence Unit

<sup>2</sup> Deloitte. Building the Lucky Country™: Business imperatives for a prosperous Australia # 3, *Positioning for prosperity? Catching the next wave*, 2014

<sup>3</sup> International and National Visitor Surveys, Tourism Research Australia, year ending September 2014

## 2. EXECUTIVE SUMMARY

Visitors to the city of Melbourne come from all parts of Melbourne and Victoria, from across Australia and, in ever increasing numbers, from around the world, especially Asia. They come as international students, convention delegates, attendees at major events, people visiting friends and relatives, and as leisure travellers.

Melbourne's attraction as a destination continues to grow. The forecast increase in visitor numbers presents a wonderful opportunity for our community and businesses. It also represents a 'flag' for industry action, especially collaborative action.

The tourism industry is complex. Many stakeholders are unclear about the roles and responsibilities of different authorities and associations. As an industry, we are in danger of working as the 'sum of the parts' rather than as a well integrated, well performing 'whole'.

The draft *City of Melbourne Tourism Action Plan 2015-2018* is a document for consultation with government and the tourism industry. In it, the City of Melbourne outlines its draft goals and actions, as well as what it sees as its roles and responsibilities in promoting Melbourne and helping visitors engage with all that the city offers.

The draft plan's goals and actions are aligned with the five stages of the Visitor Information Journey:

- **Stage one: Planning and booking**  
Goal: Melbourne is recognised as a great place to visit.
- **Stage two: Travel to the destination**  
Goal: There are many options for getting to Melbourne and information available during the journey is enticing.
- **Stage three: On arrival**  
Goal: The first impressions of Melbourne are positive.
- **Stage four: In destination**  
Goal: Visitors love Melbourne.
- **Stage five: Departure / return home**  
Goal: Visitors tell their friends and family to visit Melbourne – and plan to return themselves.

The City of Melbourne aims to be a key partner in Melbourne's global recognition as a smart, resilient, creative, knowledge city. The draft plan is part of our conversation with government and industry about the roles Council plays and the actions we take as part of that partnership.

### 3. INTRODUCTION

For travellers the world over the journey is all-important. Planning for travel is exciting and, for many people, often involves an 'education' about their chosen destination. There are so many contenders to consider – for holiday-makers, the world, as Mr Shakespeare noted, is their oyster. For business travellers, the destination may be decided for them, but based on their impressions and experiences, they may choose to extend their stay in Melbourne as well as return in their own time at a later date.

So what can all the competing destinations of the world do to capture the imagination of potential visitors and persuade them to visit their city or region?

Tourism action plans are a means of identifying opportunities for cities and regions to attract – and engage with – visitors. They are also one way to communicate across and within organisations so all areas intersecting with tourists and visitor programs can see how their activities impact on these opportunities.

This draft *City of Melbourne Tourism Action Plan 2015–2018* (the Plan) is the result of extensive internal discussion and review of relevant policies and plans. Following Council approval, industry consultation and analysis of feedback received will be undertaken, with outcomes reflected in the document that becomes the final Plan.

The Plan identifies a number of actions that will support the growth of the visitor economy in Melbourne into the future. These actions include directing profitable growth and maintaining visitor-related industries to ensure the City of Melbourne remains a highly desirable destination for global, national and local visitors, education, travel and business markets.

Central to the Plan is the ambition that visitors have the best possible experience of Melbourne during their time in the city, and that the visitor economy benefits local businesses and the community. Visitors should be able to easily navigate their way around, whether they are walking, cycling or using a myki public transport card. And information about these modes should be easily accessible – and clearly communicated – so all travellers can make the most of their precious time in the city.

In serving the 37.6-square-kilometre municipality of Melbourne, which shares its borders with seven other local governments, the Plan details the outcomes the Melbourne City Council (the Council) aims to achieve during and beyond its current term. The final Plan will include the priorities that will shape the Council's program of work for the next four years, and the required resources to achieve these outcomes.

#### **The City of Melbourne**

The City of Melbourne cultivates an environment for business and economic growth in Melbourne. Through its economic development framework, *Building prosperity together*<sup>4</sup> it brings together existing and proposed initiatives to make sure that Melbourne is prepared and well placed to meet economic opportunities and challenges.

Four pillars of activity are embedded within *Building prosperity together*.

1. Seek future growth opportunities that strengthen Melbourne's competitiveness and stimulate innovation and growth through partnerships.
2. Directly invest in infrastructure, assets, services, events and activities to improve the amenity, liveability and functionality of Melbourne for the future.

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<sup>4</sup> City of Melbourne, *Building prosperity together*, 2014

3. Increase knowledge and capability to support the development of existing and new industries.
4. Position Melbourne as the preferred Australian location for business, cultural and tourist activities.

### **An economic focus**

The tourism sector is a priority area of focus for the City of Melbourne because of its important contribution to job creation and economic growth, and its ability to increase knowledge and cultural awareness between countries.

A 2014 report by Deloitte, *Positioning for prosperity: Catching the next wave?*<sup>5</sup> identified tourism as one of the 'Fantastic Five': those sectors with the greatest potential to lift Australia's, and Victoria's, growth trajectory over the next 20 years. It notes that "... the huge and common driver for this group will be Asia. Asian growth will benefit tourism as people seek space, nature, holidays and luxury experiences<sup>6</sup>."

Deloitte forecasts have tourism growing by 4 per cent per year from now to 2033, more than doubling in size over the next two decades. Many of these new travellers will come from Asia. "Australia is ideally located to capitalise on the burgeoning Asian middle class and the demand for international travel this is generating<sup>7</sup>."

The February 2015 edition of *Tourism and Hotel Market Outlook*<sup>8</sup> has seen Deloitte Access Economics increase its forecasts for international visitation to Australia, with trips to grow by 5.7 per cent and visitor nights by 5.6 per cent each year over the next three years. In 2014, Victoria posted the strongest growth in overseas visitors (10.4%), with leisure travel being the driving force.

### **The Melbourne tourism story – statistically speaking**

The Melbourne municipality accounts for:

- 37 per cent of the greater Melbourne economy;
- 27 per cent of Victoria's Gross State Product (GSP); and
- 6 per cent of Australian Gross Domestic Product (GDP)<sup>9</sup>.

As a visitor destination, Greater Melbourne's story is a positive one:

- 25.7 million visitors, including nearly 2 million international visitors, came to Greater Melbourne and stayed a total of 63.8 million total visitor nights in the year to end September 2014.
- Melbourne is Australia's number one holiday destination for domestic overnight visitors. It is both the most preferred holiday destination in Australia<sup>10</sup>, and the most visited interstate holiday destination in Australia<sup>11</sup>.
- Over the period 2006-07 to 2012-13, tourism's contribution to the Greater Melbourne economy (Gross Regional Product) steadily increased at an average annual rate of 5.6 per cent per annum.
- Total tourism employment in the Melbourne region increased at an average annual rate of 3.8 per cent over the same period. In 2012-13, 93,900 people were directly and indirectly employed in tourism in Melbourne.

<sup>5</sup> Deloitte. Building the Lucky Country™: Business imperatives for a prosperous Australia # 3, *Positioning for prosperity? Catching the next wave*, 2014

<sup>6</sup> *ibid.* p. 13

<sup>7</sup> *ibid.* p. 33

<sup>8</sup> Deloitte Access Economics, *Tourism and Hotel Market Outlook*, February 2015

<sup>9</sup> City of Melbourne Economic Profile, 2014 Geographia

<sup>10</sup> Holiday Tracking Survey, Roy Morgan Research, June 2014

<sup>11</sup> National Visitor Survey, Tourism Research Australia, year ending December 2014

- Greater Melbourne’s direct total value of tourism accounts for around 62 per cent of the State’s direct contribution of tourism.
- Business events are worth \$1.2 billion each year to the Melbourne economy<sup>12</sup>.
- The annual cruise ship industry is worth \$170 million to Melbourne’s economy and growing<sup>13</sup>.
- Retail and hospitality together contribute more than \$4.4 billion per annum to the local economy<sup>14</sup>.

**Melbourne’s future growth**

The City of Melbourne’s business development activity document, *Building prosperity together* indicates strong growth for Melbourne in terms of both numbers of residents and international, interstate and regional visitors. It is estimated that by 2030 the city will receive 68,000 international visitors each day, an increase of 91 per cent on current daily figures of 36,000.

**MELBOURNE’S FORECAST GROWTH AT 2030**

CURRENT	FORECAST 2030	+/- CHANGE
\$71.9 billion gross local product	Anticipated annual growth rate of 3%	+ 3% p.a.
Approximately 430,000 jobs	Forecast to reach 660,000 jobs	+ 53%
Daily population of 805,000 people	Forecast to reach 1,200,000 people	+ 49%
Around 177,000 daily metropolitan visitors	Forecast to reach 225,000 metropolitan visitors	+ 27.5%
Approximately 59,000 students daily	Forecast to reach 111,000 students	+ 89%
36,000 international visitors daily	Forecast to reach 68,000 international visitors	+ 91%
30,000 daily interstate visitors	Forecast to reach 34,000 interstate visitors	+ 14%
14,000 daily regional visitors	Forecast to reach 18,000 regional Victorian visitors	+ 29%

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Deloitte’s *Positioning for prosperity: Catching the next wave?* report also noted that Australia’s tourism infrastructure has not always kept pace with demand, particularly the increased interest in high-end experiences and entertainment. Additional issues identified include logistical challenges travelling to and around a country the size of Australia; limited accommodation; and a skills shortage in hospitality roles which impacts on our ability to provide visitors with a high standard of service.

**Trends and opportunities**

There are a range of contemporary tourism opportunities and challenges which need to be recognised in order to identify appropriate plans to address them. Rises in oil prices have impacted the cost of flights for foreign travellers; there have been fewer leisure and business trips undertaken since the global financial crisis (GFC); and new tourist markets have emerged from the Asia-Pacific rim.

The recent falling Australian dollar during 2014 and 2015 is likely to make Australia more attractive to all international visitor markets, in particular business visitors, those travelling for business events such as conferences, exhibitions and incentive programs, and students and the friends and families who visit them. Melbourne will experience vigorous competition for these markets from other cities: both international cities and major cities within Australia. So Melbourne needs to ensure it is competitive, innovative and well promoted. It is crucial that

<sup>12</sup> Melbourne Convention Bureau Annual Report, 2014

<sup>13</sup> Cruise Down Under, Economic Impact of the Cruise Shipping Industry in Australia, 2013-14

<sup>14</sup> City Of Melbourne Economic Profile, 2014 Geographia

<sup>15</sup> City of Melbourne, *Building prosperity together*, 2014, p. 19



there are strong, consistent tourism branding strategies and resources in place to attract and service these markets.

Improved capacity and infrastructure are essential to meet the forecast explosion in visitor numbers. Melbourne's success as a destination has in turn highlighted its capacity and infrastructure constraints, particularly in relation to air services, commercial accommodation, visitor transport, port facilities and infrastructure.

Demand outstrips supply for direct flights into and out of Melbourne. In the year ending September 2014, 892,900 international passengers needed to transit via another port to or from Melbourne. This situation is not sustainable in terms of managing future growth. Improved rail and road links between Melbourne Airport and the central city are also required to cater for the continuing increase in visitor traffic.

The number of cruise ship visits to Melbourne has increased at an average annual rate of approximately 15 per cent over the past five years (2009-2014), from 48 ships in 2009-10 to 84 in 2014-15. Station Pier needs to be upgraded to manage this expansion. Southern Cross Station is also expected to experience a substantial rise in patronage over the seven years to 2021, increasing at an average annual rate of nine per cent, from 47.7 million in 2014 to 78.4 million in 2021.

Given the rate of forecast growth in visitors to Melbourne, it is critical that the city can provide enough accommodation to service them. With occupancy rates in the central city in 2014 averaging 86 per cent (up 4.5 per cent on the previous year), and at times being pushed into the mid 90 per cent range at peak times, there are concerns that demand will soon outstrip supply in central Melbourne. The type of accommodation required as part of Melbourne's future offering is also important. Five-star accommodation is in heavy demand, particularly with the burgeoning Chinese market. During the first quarter of 2014, five-star room occupancy rates increased 8.9 per cent year-on-year, to 91.3 per cent.

In tandem with the high occupancy rates experienced by traditional commercial accommodation providers, Melbourne has seen an increase in 'home sharing', through organisations such as Airbnb. There are more than 1,000 Airbnb listings in the Melbourne municipality, including more than 340 in the Central Business District. On the assumption that each listing has one room available, Airbnb represents approximately 6 per cent of Melbourne's commercial accommodation – hotels, motels, serviced apartments and home sharing. In fact, Airbnb listings in Victoria have doubled since 2014, and Airbnb predicts the number will double again by 2016.

### **A visitor-focused plan**

The Plan is a dynamic and evolving document and directly responds to changing market forces and visitor needs. The focus of the Plan is on enhancing the quality of visitor experiences and maximising opportunities for the visitor economy. It encompasses destination management, tourism development and visitor services. It identifies tourism opportunities for Melbourne as a municipality, a capital city and a gateway to southern Australia. The Plan also includes ways to strengthen partnerships to maximise visitor numbers, encourage the development of tourism services, products and infrastructure, and a multi-channel approach to marketing and promoting Melbourne.

Each project within the Plan has clear objectives, roles and responsibilities. However, opportunities identified rely on continuing consultation and collaboration between the City of Melbourne, metropolitan councils, Victorian and Australian government agencies and the tourism industry.

## 4. ABOUT MELBOURNE

### The place

Melbourne was founded in 1835, but its history dates back more than 40,000 years. Melbourne is the traditional land of the Kulin Nation – the Wurundjeri, Boonerwung, Taungurong, Djajawurrung and the Wathaurung – and it has always been an important meeting place and location for events of social, educational, sporting and cultural significance.

The city of Melbourne is managed by a popularly-elected municipal government. It is a capital city and is also the gateway to regional Victoria. It covers an area of 37.7km<sup>2</sup> and incorporates 16 suburbs, from Flemington and Parkville in the north, East and West Melbourne, and parts of South Yarra and Port Melbourne to the south.

Melbourne is a hub for the State of Victoria: its infrastructure is linked, its transport network is extensive and its airport operates 24 hours a day.

Embracing – and celebrating – all aspects of our four seasons, Melbourne can be very warm in summer, and is stunningly beautiful in autumn. Winter days can be chilly, but the city's cafés and bars provide the perfect excuse for a warm drink and a cosy conversation. And in spring, coats and scarves are replaced with the lighter attire of the balmy days to come.

The very essence of the world's finest cities lies in the vitality of their streets and public places. Melbourne's built environment is characterised by intelligent architecture and urban design that directly supports the needs and preferences of a diverse community. Its architecture has a focus on personal amenity and reflects an attention to detail which ensures a seamless transition from building to pavement. Its buildings and structures encompass a wide variety of architectural eras and designs, with modern, cutting-edge design adding to the fascinating mix of heritage architecture and ensuring the skyline is constantly changing. Melbourne has a feeling of openness and natural light, and building height limits and heritage controls have contributed to the city's 'human scale'. Many of Australia's most prolific architects have been Melbourne-based and, in recent years, the city has been home to internationally recognised architectural practices as well as local award-winning architects and companies. There are many examples of intact 19<sup>th</sup> century streetscapes and public buildings, such as the State Library, the GPO, Melbourne Town Hall and Flinders Street Station. Melbourne's Royal Exhibition Building was the first building in Australia to achieve a World Heritage listing, and it is one of the world's oldest remaining exhibition pavilions. The city is also one of the world's largest Art Deco cities, with many examples of Art Deco architecture – including office buildings, apartments and residential buildings, cinemas and theatres, and public and institutional buildings and facilities – located in the city centre. An annual 'Open Melbourne' program enables access to many of Melbourne's architectural treasures.

Melbourne has received many accolades as a leader in a number of civic, creative, economic and business arenas. It has been recognised as the 'World's Most Liveable City' by *The Economist* Intelligence Unit for the past four years, and fourth most liveable city in global affairs magazine *Monocle's* 2015 Quality of Life Survey rankings. It is a 'knowledge city', a city which creates and exchanges new ideas and developments that drive innovation, economic prosperity and sustainability. For the third time, it won the Most Admired Knowledge City Award (MAKCi) at the 2015 Knowledge Cities World Summit, an international acknowledgement of the City of Melbourne's vision of being a place where ideas and talent thrive, based on a well-resourced education and research sector and knowledge networks. It is home to world-renowned biomedical and medical centres, specialist libraries, museums, research institutes, design incubators and centres, and seven major universities – including Australia's highest ranking, the University of Melbourne, in the *Times Higher Education* World University Rankings. It is also a 'resilient city', rated as a world leader in resilience by the New

York-based Rockefeller Foundation. The City of Melbourne has been a member of the UN Global Compact since 2004 and is a participating member of C40 Climate Leadership Group.

With a deeply-entrenched artistic and creative focus, the city hosts and supports many cultural institutions, such as art galleries; events and festivals; public/street art; popular, live and independent music; film; literary pursuits; fashion; performing arts venues, including a unique and brilliantly intact commercial theatre precinct; a magnificent concert hall; an acoustically-excellent recital centre; and a museum that explores Victoria's natural environment, culture and history. They all contribute to the intellectual wellbeing of residents and visitors by providing them with the opportunity to experience thought-provoking, humorous, challenging, moving and simply beautiful creative talent in all its forms. The physical structure of Melbourne, through its built environment, also provides a logical canvas for artistic expression, and its laneways feature always interesting and sometimes controversial street art. And culture extends to sporting activities, for which Melburnians' passion is unsurpassed. The country's greatest arena, the Melbourne Cricket Ground, hosts sportsmen and women of all codes and is itself a shrine to the physical challenges, sporting prowess and success of generations of athletes.

Melbourne was just the second city to be named a UNESCO City of Literature. The city's connection to Australia's greatest writers continues through its extensive program of literary events and festivals, and the Victorian Prize for Literature is the richest writer's prize in Australia. Melbourne supports a diverse range of writers, a prosperous publishing industry, a successful culture of independent bookselling and a wide variety of literary organisations. Australia's oldest public library, the State Library of Victoria, was founded in 1854. According to South African-born Australia-based writer, Peter Temple: "I think Melbourne is by far and away the most interesting place in Australia, and I thought if I ever wrote a novel or crime novel of any kind, I had to set it here." And he did.

Melbourne also has a reputation as Australia's live music capital, with more venues providing more live music than any other Australian city. Classical, rock, a cappella, jazz, instrumental, experimental – it's all here in magnificent purpose-built auditoriums and halls, in cosy bars, in clubs and pubs, and venues of all sizes catering for all musical tastes and interests.

The city is renowned as a major events destination and each year attracts significant international fashion, culture and sporting events. Business events are also well represented and with more than 500 local and international business events held in the city each year, generating more than \$360 million for the State.

Australia's retail heartland, Melbourne has many thriving shopping precincts, cafés and restaurants. The retail and hospitality sectors together contribute around \$4.4 billion per annum to Melbourne's economy (five per cent of the total city economy)<sup>16</sup>. In 2014, residents, workers, students and visitors spent \$2.4 billion in the retail and hospitality sectors<sup>17</sup>.

The city is also defined by its passion for food. An extraordinary array of high quality, locally sourced and organic food is readily accessible for local residents to prepare at home and for the many restaurants and cafés throughout the city. Its chefs are world-renowned and enjoy a remarkable freedom to experiment and present imaginative – and delicious – culinary achievements, made possible not only by their individual talent but by the availability of fresh produce and locally-produced ingredients. US chef and author, Anthony Bourdain, said: "I like the fact that Melbourne always seems to support their chefs and promote them in ways I find really admirable."

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<sup>16</sup> City Of Melbourne Economic Profile, 2014 Geographia

<sup>17</sup> Retail and Hospitality Expenditure Study, City of Melbourne/SGS Economics & Planning 2014

Melburnians and visitors love the city's lifestyle – its vibrant energy, restaurants, markets, fashion boutiques, café-filled laneways, cool bars, stimulating galleries and museums, spacious parks and village-like inner suburbs, each with its own special character.

At street level, Melbourne's labyrinth of connecting laneways and arcades provide an 'other world' experience of intimate spaces and mystery.

### **The people**

Since 2001, Melbourne's residential population has doubled and is predicted to double again by 2030. 844,000 people pass through Melbourne municipality each day, including residents, workers, visitors and students<sup>18</sup>.

Cultural diversity is an intrinsic element of Melbourne's identity, and its multicultural population contributes to the city's unique ambience. Each of the municipality's 16 suburbs has an individual cultural character. Forty-eight per cent of all residents were born overseas, while many others have ties to a range of different ancestries through parents and grandparents. Melbourne is home to people from more than 200 countries who speak more than 230 languages and dialects and who practise more than 120 faiths and religions. And Melbourne has the third-highest intake of international students in the world<sup>19</sup>.

In Melbourne, people come together to talk and to explore. They are curious about life, about how things work and what people do. A city of substance, of gravitas, Melbourne is full of conversation, and its many cafés and bars, laneways and keyhole places facilitate that sense of connection with the world and generate an intimacy within the local environment.

Its tram network, including the City Circle tourist tram, provides free transport throughout the city centre, and its streets and laneways encourage pedestrians to discover their own Melbourne secrets.

Melburnians also love to celebrate, with the year-round calendar of events offering something for everyone. The city has a strong culture of philanthropy and volunteering, and its residents are known for being friendly and inclusive.

### **The value of tourism to Melbourne**

The underlying premise of this Plan is the diverse use of the city, a place that welcomes and caters for all city users: visitors and locals alike. Everyone benefits from appropriately managed tourism.

Tourism's contribution to the Greater Melbourne economy has been steadily increasing for the past six years, at an average annual rate of 5.6 per cent per annum.

In 2012-13, the tourism industry contributed an estimated \$8.5 billion to the Greater Melbourne economy, including \$5.4 billion in direct and \$3.1 billion in indirect tourism Gross Regional Product (GRP). This represents approximately 3.3 per cent of Greater Melbourne's total GRP in 2012-13<sup>20</sup>.

### **Tourism employment**

In 2012-13 there were 71,900 people (comprised of 40,700 full-time and 31,200 part-time employees) directly engaged in tourism-related industries in Greater Melbourne. A further

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<sup>18</sup> City of Melbourne Daily Population Estimates and Forecasts, 2013

<sup>19</sup> City of Melbourne, *Building prosperity together*, 2014

<sup>20</sup> Victorian Regional Tourism Satellite Accounts 2012-13, produced by Deloitte Access Economics for Tourism Victoria, January 2015

22,000 people were employed indirectly, giving tourism a total employment impact of 93,900 people. This represents a 2.2 per cent year-on-year increase from 2011-12 to 2012-13.

### **Visitor expenditure in the City of Melbourne**

Visitors spent an estimated total of \$6.1 billion in the Melbourne municipality in the year ending September 2014<sup>21</sup>.

International visitors spent an estimated \$3.1 billion, with international student visitors being the biggest contributors overall (41 per cent of international visitor total spend)<sup>22</sup>. Conference and convention delegates had by far the highest daily spend among international visitors, at \$1,019 per day<sup>23</sup>.

Domestic overnight visitors spent an estimated \$2.4 billion in the year ending September 2014, with holiday-makers being the biggest contributors overall (59 per cent of total domestic overnight spend)<sup>24</sup>. Domestic overnight business visitors were the second highest domestic overnight spenders overall, contributing an estimated \$900 million in total. Domestic delegates had the highest daily spend among domestic visitors, at an average of \$959 per day<sup>25</sup>.

Domestic daytrip visitors spent an estimated \$565 million in the municipality in the year ending September 2014, with holiday-makers accounting for 71 per cent of spend. Business domestic daytrip visitors contributed 16 per cent<sup>26</sup>.

### **Major markets**

The municipality received an estimated 10.9 million visitors to the year ending September 2014, including 5.5 million domestic daytrip visitors, four million domestic overnight visitors, and 1.4 million international overnight visitors<sup>27</sup>.

### **International visitors**

The Melbourne municipality received an estimated 1.4 million international overnight visitors for the year ending September 2014, an increase of 11.4 per cent on the previous year<sup>28</sup>. An estimated 69 per cent of all international overnight visitors to Greater Melbourne stayed overnight.

The largest source markets of international overnight visitors to the municipality for the year ending September 2014 were China (20 per cent), New Zealand (11 per cent), United Kingdom (9 per cent) and United States (8 per cent). Other significant markets included Singapore (5 per cent), Malaysia (5 per cent) and Germany (4 per cent)<sup>29</sup>.

Eighty per cent of international visitors to the municipality are leisure travellers (62 per cent on holiday and 18 per cent visiting friends and relatives), 15 per cent are on business, and four per cent are education visitors. Over the last four years, international overnight visitation to the municipality has grown at an estimated average annual rate of 10 per cent, with employment (+17.5 per cent), visiting friends and relatives (+10.9 per cent) and holiday (+10.4 per cent) visitors providing the highest average annual growth rates. Education and business visitors increased at average annual rates of 9 per cent and 7 per cent respectively, during the same period<sup>30</sup>.

<sup>21</sup> International and National Visitor Surveys, Tourism Research Australia, year ending September 2014

<sup>22</sup> International Visitor Survey, Tourism Research Australia, year ending September 2014

<sup>23</sup> Melbourne Convention Bureau Annual Report, 2014

<sup>24</sup> National Visitor Survey, Tourism Research Australia, year ending September 2014

<sup>25</sup> Melbourne Convention Bureau Annual Report, 2014

<sup>26</sup> National Visitor Survey, Tourism Research Australia, year ending September 2014

<sup>27</sup> International and National Visitor Surveys, Tourism Research Australia, year ending September 2014

<sup>28</sup> International Visitor Survey, Tourism Research Australia, years ending September 2013-14

<sup>29</sup> International Visitor Survey, Tourism Research Australia, year ending September 2014

<sup>30</sup> International Visitor Survey, Tourism Research Australia, years ending September 2010-14

### ***Domestic overnight visitors***

Greater Melbourne is voted number one by Australians for a variety of attributes, including sport, culture, major sporting and cultural events, shopping, theatre, restaurants, cafés and bars, and interesting and diverse streets and precincts<sup>31</sup>.

The Melbourne municipality is the most popular place to stay for domestic overnight visitors to Greater Melbourne, with more than half (54 per cent) staying in the municipality in the year ending December 2014<sup>32</sup>. It is likely that many more visit the municipality during their stay.

Interstate overnight visitors were the key market for the municipality during this period, and accounted for 74 per cent of total domestic overnight visitors to the area in the year ending December 2014.

Fifty-nine per cent of domestic overnight visitors to the Melbourne municipality were leisure visitors in the year ending December 2014, including 40 per cent who were on holiday and 18 per cent who were visiting friends and relatives. A further 35 per cent visited for business purposes<sup>33</sup>.

### ***Domestic daytrip visitors***

Melbourne municipality received an estimated 5.5 million domestic daytrip visitors for the year ending December 2014, a decrease of 4.4 per cent compared with the previous year.

Domestic daytrippers to the municipality have been decreasing at an average annual rate of 2.1 per cent for the past four years (years ending December 2010 to 2014). This is in contrast to the increase in domestic daytrippers to Greater Melbourne over the same period (+2.3 per cent average annual rate). The decrease can be primarily attributed to a reduction in holiday visitors (-4.2 per cent average annual rate over four years), and a decrease in 'other' visitors (-4.0 per cent average annual rate over four years). In contrast, business visitors and those visiting family and friends have increased at average annual rates of 6.3 per cent and 1.1 per cent respectively over the same period.

### **Forecast growth**

It is forecast that most growth in inbound tourism to Australia will continue, with Asia playing a key role. Forecasts predict that Chinese visitation to Victoria will increase at an average annual rate of 8.2 per cent to 2022/23, together with Malaysia (6.9 per cent), India (6.4 per cent), Singapore (6 per cent) and Indonesia (5.9 per cent). Annual visitor numbers to Victoria are also expected to continue to grow from the United States (4 per cent), United Kingdom (3.9 per cent) and New Zealand (2.4 per cent)<sup>34</sup>.

By extrapolating these forecasts, the city will experience an annual international visitor growth rate of 2.5 per cent in the next two years and around 3.7 per cent between 2012 and 2030.<sup>35</sup>

### **Servicing visitors' accommodation needs**

It is critical that the city is able to provide enough accommodation to meet forecast demand. With 2014 occupancy rates in the city averaging at 86 per cent (+4.5 per cent from the previous year), and at times being pushed into the mid-90-per-cent range on peak nights, there are concerns that demand will soon outstrip supply in central Melbourne<sup>36</sup>. At this time,

<sup>31</sup> Tourism Victoria's Brand Health Survey, Roy Morgan Research, 2014

<sup>32</sup> National Visitor Survey, Tourism Research Australia, year ending December 2014

<sup>33</sup> National Visitor Survey, Tourism Research Australia, year ending December 2014

<sup>34</sup> Forecast Visitation to Victoria, Tourism Victoria, Autumn 2014

<sup>35</sup> City of Melbourne Daily Population Estimates and Forecasts, 2013

<sup>36</sup> Tourism and Hotel Market Outlook, Deloitte Access Economics, February 2015

Melbourne has more rooms approved for construction in the pipeline than it has seen for several years, but this number is still described as “modest relative to the demand outlook<sup>37</sup>.”

The type of accommodation added to Melbourne’s offering in future should also be considered, with five-star accommodation in heavy demand, particularly by the burgeoning Chinese market. During the first quarter of 2014, five-star accommodation room occupancy rates increased 8.9 per cent year-on-year to 91.3 per cent<sup>38</sup>.

The growth of the ‘sharing economy’, particularly home sharing, is significant. Melbourne is cited as being the world’s sixth most popular Airbnb destination. This growth presents an opportunity to assist home-sharing hosts to provide good quality, legally compliant services, consistent with Melbourne’s welcoming, inclusive culture.

### **Melbourne Airport**

International flights to Melbourne have increased at an average annual rate of 11 per cent over the last five years (2009-14). Demand also continues to outstrip supply for direct flights to and from Melbourne, with almost 900,000 international passengers in the year ending September 2014 forced to transit via another port to or from Melbourne. This figure represents 11 per cent of the 7.8 million international travellers to and from Victoria and includes Australian travellers travelling internationally. International passenger volumes have grown at an average annual rate of 8 per cent over the over the five years to June 2013.

Domestic passenger volumes for Melbourne Airport have increased at an average annual rate of 4.2 per cent over the five years to June 2013, reaching a record 23 million domestic passengers in the year ending June 2013.

The total number of passenger movements through Melbourne Airport is forecast to increase by 3.9 per cent each year to 64 million, over the 20 years to 2033<sup>39</sup>. Melbourne Airport is in the process of constructing a third runway, which will allow it to accommodate the increased aircraft movements until 2040<sup>40</sup>.

### **Melbourne’s future prosperity**

The future prosperity of Melbourne relies on its ability to seize global and local opportunities. The City of Melbourne has identified several ways to help build the right environment for the city’s future economic prosperity<sup>41</sup>, including:

- developing partnerships with international city governments, businesses, industry associations, peak bodies and groups to drive investment and location decisions;
- supporting universities to continue to attract international students to Melbourne;
- directly investing in infrastructure, assets, services, events and activities to improve the amenity, liveability and functionality of Melbourne; and
- supporting new and emerging businesses, and different business models, through grants and sponsorships.

<sup>37</sup> Tourism and Hotel Market Outlook, Deloitte Access Economics, February 2015

<sup>38</sup> Pulse: Strategic Advisory Hotels and Hospitality Group, JLL, May 2014

<sup>39</sup> Melbourne Airport Runway Development Program factsheet 2015

<sup>40</sup> Melbourne Airport Master Plan, 2013

<sup>41</sup> City of Melbourne, *Building prosperity together*, 2014

## 5. THE CITY OF MELBOURNE

### The City of Melbourne's roles and responsibilities

Melbourne is a capital city and a gateway to regional Victoria. The City of Melbourne has a direct role in promoting the city and works with other stakeholders and partners to amplify its tourism message.

The City of Melbourne, as a Council, oversees Melbourne's city centre and inner suburbs. As a capital-city council, it can speak on behalf of Melbourne in local, national and international forums. It works with other local councils and the State Government of Victoria to ensure that Melbourne is one of the safest, healthiest, and cleanest cities in the world. It supports Melbourne's position as Australia's pre-eminent centre for arts and culture, education, dining and shopping.

Among other things, the City of Melbourne operates a network of face-to-face visitor information services, has a comprehensive program of events and city activation, promotes the city as a destination to Melburnians, works with its partners to attract major events, conventions and exhibitions, and is responsible for the development of wayfinding signage and other visitor-related infrastructure.

### Melbourne tourism's strategic framework

The City of Melbourne has established a strategic framework to guide the development of the *Tourism Action Plan 2015–2018* to ensure that positive visitor experiences are created.

The three key principles underpinning the Plan are:

1. **Sustainability:** the City of Melbourne's role in tourism will contribute to Melbourne's social, economic and environmental sustainability.
2. **Research and evaluation:** Melbourne's investment in tourism will be informed by research, and the return on investment to the community will be evaluated against measures specified in the Plan.
3. **Partnerships:** the *City of Melbourne Tourism Action Plan* is being developed in partnership with stakeholders; its implementation will be also be collaborative.

Providing reference for the Plan are:

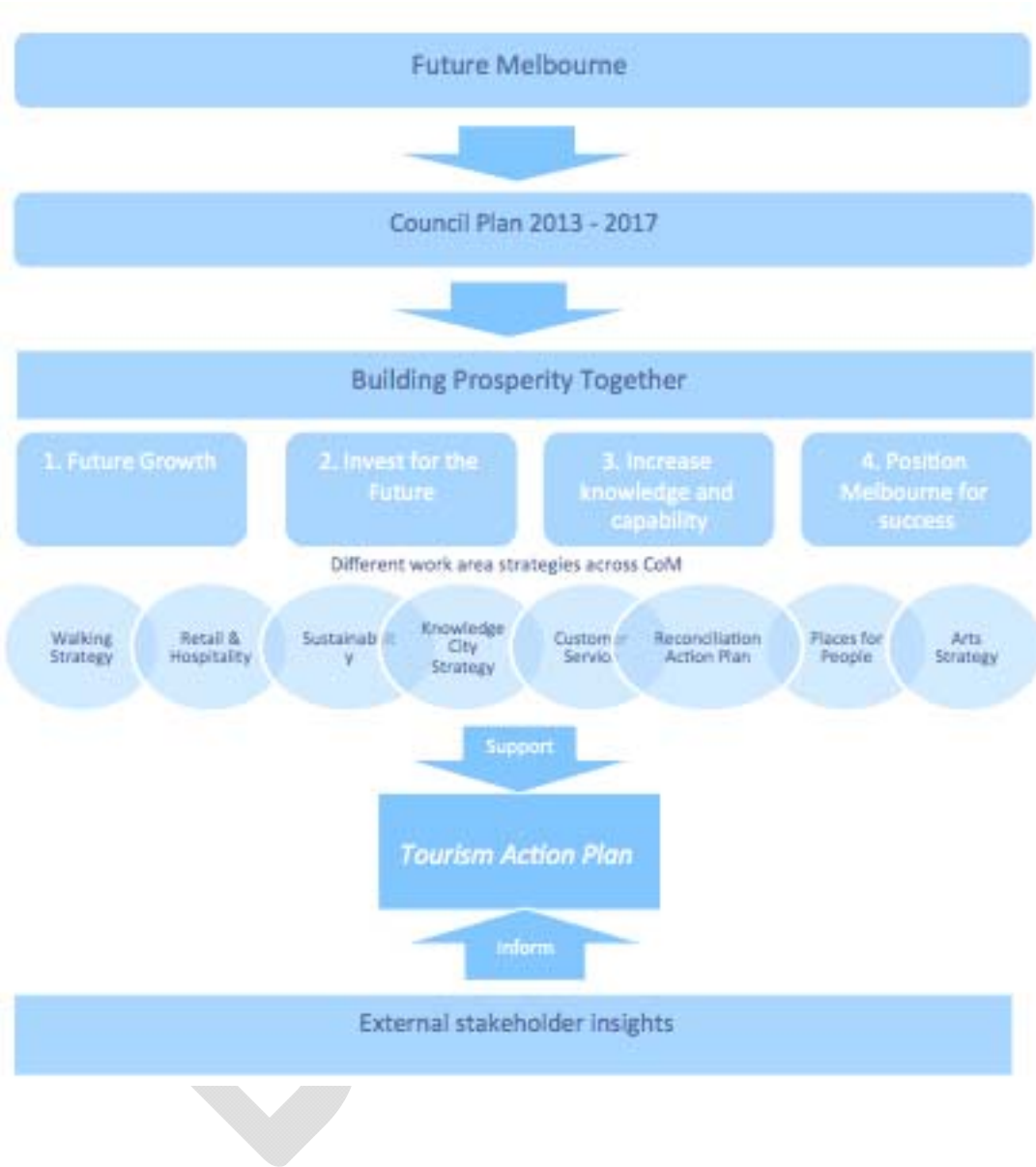
- *Future Melbourne*, the community of Melbourne's long-term plan for the future direction of all aspects of city life. It envisages Melbourne as being a bold, inspirational and sustainable global city and one of the top ten most liveable and sustainable cities in the world. The *Future Melbourne* plan is a resource through which the current and future councils can develop their council plans.
- *Council Plan 2013-17*, a statement of what the City of Melbourne will do to help achieve the community's vision. The plan describes the outcomes the council aims to achieve during its term, the priorities that will shape its program of work over the next four years and the resources required.
- *Building prosperity together*, the City of Melbourne's economic development framework.

The City of Melbourne *Tourism Action Plan 2015–2018* falls under Goal 3 of the *Council Plan 2013-17*: 'A prosperous city', which states that Melbourne will have a global focus with first-rate infrastructure and services, a highly skilled workforce and affordable business



accommodation. It will share knowledge, mentor emerging businesses, collaborate and attract global investment and visitors<sup>42</sup>.

In addition, the *Tourism Action Plan* enhances the four pillars outlined in *Building prosperity together*<sup>43</sup> by cultivating an environment for business and economic growth through identified tourism goals.



<sup>42</sup> City of Melbourne Council Plan 2013-17

<sup>43</sup> City of Melbourne, *Building prosperity together*, 2014

## 6. THE CITY OF MELBOURNE TOURISM ACTION PLAN 2015–2018

### The Visitor Information Journey

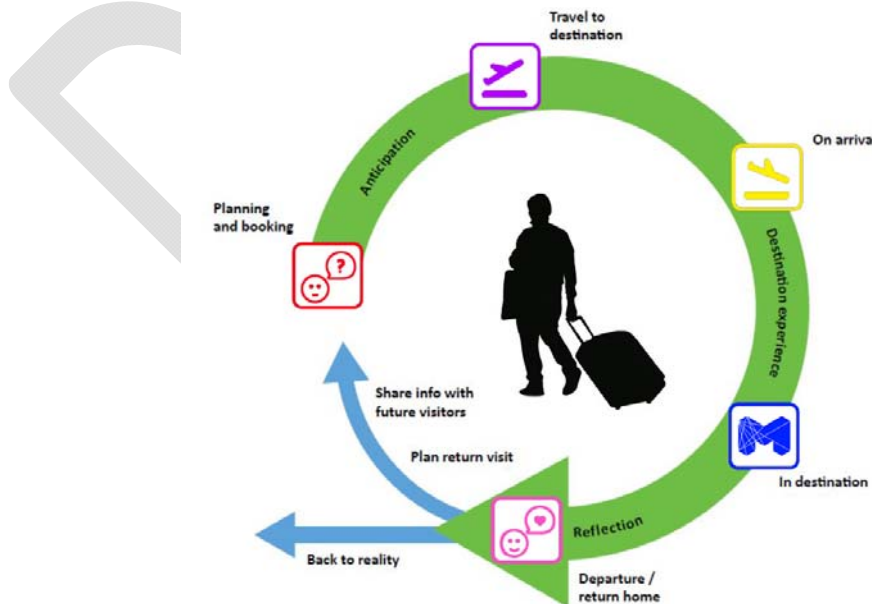
In 2013, the City of Melbourne undertook research into the way in which visitors plan their journeys, and how they access information to support their trip<sup>44</sup>. The creation of a positive visitor experience, together with the five distinct stages identified in the *Visitor Information Journey Insights*, reflect the visitor lifecycle and inform the development of the *Tourism Action Plan 2015–2018*.

The five stages of the visitor information journey (VIJ) are:

1. Planning and booking.
2. Travel to destination.
3. On arrival.
4. In destination.
5. Departure/return home.

The research indicated that preferred information sources or channels reflected the stage of a journey. Information sources were not necessarily connected or used in sequence, and visitors differed in both how and in what order they accessed information. Social media was shown to be heavily used across each of the journey stages. The research also found that some types of information, in particular maps and transport options, are highly sought after at all of the first four stages.

There is a strategic opportunity to ensure that information about Melbourne and Victoria available at the planning and booking stages is consistent with information provided to visitors en-route to Melbourne, on arrival in the city and when exploring the destination. The City of Melbourne research into the VIJ – the information visitors want, when they want it, and through which channels – has generated the basis of the City of Melbourne *Tourism Action Plan 2015–2018*.



<sup>44</sup> City of Melbourne, *Visitor Information Journey Insights*, Nitty Gritty Report, 2013

## Stage One – Planning and Booking

### **GOAL: MELBOURNE IS WIDELY RECOGNISED AS A GREAT PLACE TO VISIT**

The planning and booking stage is critical for Melbourne, as it is for all destinations. This is when travel decisions are made. The city needs to stand out in a vast array of online and social media spaces in order to reach potential visitors when they start thinking about their journeys.

Tourism Australia's international marketing focus is chiefly on Sydney and regional and outback Australia as the country's 'hero' attractions. Regional Victoria is the marketing focus of Tourism Victoria, with little emphasis on or recognition of the importance of Melbourne as the 'gateway' to regional areas, particularly for international visitors. While Melbourne enjoys an enviable reputation as a significant tourist destination among those who have visited the city, it is not high on the priority list of our national and state tourism bodies.

Therefore, City of Melbourne visitor services play an influential role in what people do and how much they spend during the 'in destination' stage of the VIJ. Once visitors are in the city, the services encourage them to stay longer, see more and spend more. The issue is how to start that influence at the 'planning and booking' stage when people make decisions about which place to visit and how long to stay.

Information sources before the journey are a key area in which to engage early with travellers; however, they can also be confusing. Clear and informative branding of online content is essential in order to meet this objective.

Many unique aspects associated with Melbourne, such as walking tours, design excellence, café and laneway culture, and 'liveability', are not obvious at this important planning stage, and this issue needs to be addressed. Would-be visitors want information in a way they can tailor or 'curate' to their interests, and Melbourne's particular attractions are conducive to this need.

Before undertaking a journey, accommodation is the most sought after information subject (79 per cent of the VIJ's total survey participants). Maps, attractions, traveller information and things to see and do were other topics of interest at the planning and booking stage. Digital map websites and mobile applications, together with official government tourism websites, were the most preferred methods of accessing this information. Accommodation staff also rated highly as an information source among all the possible online options.

Within Australia, Melbourne's appeal as a highly desirable destination is well documented. Greater Melbourne is Australia's number one holiday destination for domestic overnight visitors. It is also both the most preferred holiday destination in Australia<sup>45</sup> and the most visited interstate holiday city<sup>46</sup>.

Melbourne is also voted number one by Australians for a variety of attributes, some of which are sport, culture, major sporting and cultural events, shopping, theatre, world-class restaurants, cafés and bars, and interesting and diverse streets and precincts.<sup>47</sup>

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<sup>45</sup> Holiday Tracking Survey, Roy Morgan Research, June 2014

<sup>46</sup> National Visitor Survey, Tourism Research Australia, year ending December 2014

<sup>47</sup> Tourism Victoria's Brand Health Survey, Roy Morgan Research, 2014

In terms of international visitors, Melbourne received 2 million visitors compared with Sydney's 3 million for the year ending September 2014. However, Melbourne is closing this gap, with international visitation increasing at an annual average rate of 8.8 per cent over the last five years, compared with Sydney's 4.4 per cent.

As a destination, Melbourne can address some of the issues associated with destination choice at the planning and booking stage, but many are beyond its control. While Australia ranks highly as an aspirational destination for many international markets, actual visitation is much lower. Perceived barriers to travel for some markets include the high cost of airfares to Australia, together with living expenses and travel costs within the country. A general lack of knowledge about Australia and limited familiarity with Melbourne as a destination present additional challenges.

Travellers are increasingly motivated by the environmental credentials of potential destinations, with a recent worldwide study establishing that around 40 per cent consider environmentally friendly tourism when making their travel plans. At the planning and booking stage, Melbourne can position itself as smart, intriguing, green and clean.

And Melbourne's reputation as a business and events destination has seen an increase in the number of international conferences hosted in the city since 2009/10. Melbourne was awarded as Australasia's Leading Meetings and Conference Destination for the second year at the 21st annual World Travel Awards in October 2014. However, new facilities in Sydney will open in 2017, with ICC Sydney promoted as "Asia Pacific's premier integrated convention, exhibition and entertainment precinct ..." and aggressively supported in funding terms by Destination NSW.

Melbourne needs to continue to attract international and national meetings, conferences and conventions, with information about its meeting facilities actively promoted at the planning and booking stage. The expansion of the Melbourne Convention and Exhibition Centre – announced in the Victorian State Government's 2015 budget and due for completion in 2018 – is a welcome step towards this goal.

**GOAL: MELBOURNE IS WIDELY RECOGNISED AS A GREAT PLACE TO VISIT**

Outcomes	Strategies and actions	Partners
<p>Melbourne is recognised as a great place to visit, study, host conventions and stage events.</p> <p>Information about the city of Melbourne is easy to find at the trip planning stage.</p> <p>Intending visitors are able to book city accommodation, tours and other product with ease.</p> <p>Melbourne’s sporting, cultural and business events convert to high visitor numbers.</p> <p>Government and industry policy supports Melbourne’s attraction as a tourist destination.</p>	<p><b>1. Strengthen Melbourne’s and the city’s recognition and appeal in key markets</b></p> <ul style="list-style-type: none"> <li>• Work with the Victorian State Government and industry to identify visitor markets and segments that best align with Melbourne’s strengths and that represent strong yield for the city’s visitor economy.</li> <li>• Work with the Victorian State Government and industry to develop a ‘Team Melbourne’ approach to marketing Melbourne internationally, nationally, regionally and locally.</li> <li>• As part of ‘Team Melbourne’, develop integrated, multi-channel marketing strategies to attract priority markets, encourage maximum stay and spend, and ensure visitor satisfaction with the destination.</li> <li>• Work with the Victorian State Government to create a fresh, strong <i>Brand Melbourne</i> for use by Team Melbourne members in campaigns and programs aimed at attracting investors, students, businesses, major events, business events and leisure markets, such as China and South-East Asia.</li> <li>• Work with partners to develop bespoke itineraries and packages that link to event-based cruises, for example, the Melbourne Cup and major conventions being held in Melbourne, and create itineraries that profile the city’s strengths through Tourism Australia and Tourism Victoria’s visiting journalists programs.</li> </ul> <p><b>2. Position the city of Melbourne as a smart, intriguing, green and clean city</b></p> <ul style="list-style-type: none"> <li>• As part of <i>Brand Melbourne</i>, promote the city’s international awards and special attributes, including its liveability and designation as a UNESCO City of Literature and the world’s Most Admired Knowledge City, its selection as one of the world’s 100 Resilient Cities, its recognition as a safe and friendly city, and as the world’s best large city for sports.</li> <li>• Work with Melbourne’s universities, research institutions, design and creative industries, and the Victorian State Government to strengthen the city’s knowledge economy and its</li> </ul>	<p>Victorian State Government</p> <p>Tourism and events industries</p> <p>Tertiary education sector</p> <p>City businesses</p>

	<p>environmental and ‘smart city’ credentials.</p> <ul style="list-style-type: none"> <li>• Help boost international recognition of the city’s high quality education, research and development institutions; business and investment opportunities; skilled workforce; and excellent convention and exhibition facilities.</li> <li>• Promote the City of Melbourne’s Zero Net Emissions targets and programs, and its achievements in mitigating the impacts of climate change on the city.</li> </ul> <p><b>3. Extend the City of Melbourne’s digital ‘reach’ into key visitor markets</b></p> <ul style="list-style-type: none"> <li>• Develop a digital action plan for targeting priority visitor markets and popular social media and online channels, for example Weibo and Wechat in China.</li> <li>• As part of the digital action plan, extend the reach of the City of Melbourne’s visitor services into the online and social media worlds. Train staff and volunteers to provide visitor information and advice through digital channels, and to support sharing platforms such as Trip Advisor and Foursquare.</li> <li>• Create social media platforms for City of Melbourne’s visitor services, for example, dedicated Facebook, Twitter, Tumblr and Instagram accounts that make it easy for intending travellers to source trip planning information and that encourage visitors to share opinions and recommendations.</li> <li>• Create maps and other content for mobile and digital platforms, available in languages of key markets and in formats that visitors can customise or ‘curate’ according to their interests.</li> </ul> <p><b>4. Encourage people to visit Melbourne and extend their stay in the city</b></p> <ul style="list-style-type: none"> <li>• Boost the city’s strength as Australia’s centre for music theatre, live music, arts and culture, food and wine, major leisure events, shopping, international sporting events and business events.</li> <li>• Work with industry and government to ensure Melbourne has a year-round calendar of</li> </ul>	
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	<p>sporting and cultural events, theatre and entertainment, exhibitions, festivals and conventions.</p> <ul style="list-style-type: none"> <li>• Collaborate with Melbourne Convention Bureau (MCB) to identify high yield international business events that align with Melbourne’s growing knowledge capacity, and contribute to bid development and strategies to secure these events for Melbourne.</li> <li>• Identify key business events and collaborate with MCB, conference organisers and the tourism, retail and hospitality sectors to develop strategically-targeted cultural programs designed to leverage delegate expenditure.</li> <li>• Work with the City of Melbourne’s Retail and Hospitality Advisory Board, arts and entertainment sectors to develop information, incentives and other value-adding offers to encourage business events delegates, festival and major event participants to plan an extended stay in Melbourne.</li> <li>• Provide regular, up-to-date information to the city’s concierge network.</li> <li>• Collaborate with national and international arts and education partners to develop new creative forums, conferences, symposia, classes and residencies in Melbourne.</li> </ul> <p><b>5. Assist city businesses to build tourism products available in-market</b></p> <ul style="list-style-type: none"> <li>• Help city businesses develop products that are available for sale through the international wholesale and inbound travel distribution systems.</li> <li>• Support city businesses to promote their new products to international buyers at key trade shows, such as Tourism Australia’s annual Australian Tourism Exchange (ATE), and through the Australian Tourism Data Warehouse (ATDW) and other popular tourism platforms, including the City of Melbourne’s ‘What’s On’.</li> </ul> <p><b>6. Position Melbourne for continued tourism success</b></p> <ul style="list-style-type: none"> <li>• Work with the Victorian tourism industry on policies relating to visas, taxes and charges and other issues that support industry and the community interests, for example, working</li> </ul>	
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	<p>holidays, Passenger Movement Charges and regulatory reform.</p> <ul style="list-style-type: none"><li>• Support the Victorian State Government's recently announced plan to extend the Melbourne Convention and Exhibition Centre and contribute to its business development program and visitor infrastructure.</li></ul>	
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## Stage Two – Travel to Destination

### **GOAL: THERE ARE MANY OPTIONS FOR GETTING TO MELBOURNE AND INFORMATION AVAILABLE DURING THE JOURNEY IS ENTICING**

The decision to visit Melbourne has been made, and travellers are now en route.

Whether travelling by air, sea, rail or road, there are still opportunities to influence the type of activities that will be undertaken once visitors are in Melbourne.

Promotion through in-flight magazines and DVDs, and on-board briefings on planes, cruise ships and trains can all encourage reinforcement of a positive Melbourne story.

Not all travellers come to Melbourne from their home base. Melbourne may be one of many destinations, or they may take advantage of a stopover on their way. Keeping the Melbourne message top of mind through in-flight information, or on-board briefings and information on any of the cruise ships that visit Melbourne maintains the Melbourne connection and influences travellers' activities during their time in the city.

International flights to Melbourne have increased at an average annual rate of 11 per cent over the last five years (2009-14). Despite the barriers, demand continues to outstrip supply for direct flights to and from Melbourne, with 892,870 international passengers being forced to transit via another port to/from Melbourne – in particular, Sydney – to year end September 2014. That's 11 per cent of the 7.8 million international travellers to/from Victoria, including Australian passengers travelling internationally.

There are currently no direct flights to Melbourne from Canada, Sri Lanka, South America or Taiwan, although visitor numbers to Melbourne from these markets are growing at a rate well above those of Sydney or Brisbane.

In 2010, the forecast growth of international aircraft movements was estimated at an average of 2.6 per cent per year to 2030<sup>48</sup>.

The number of cruise ship visits to Melbourne has increased at an average annual rate of more than 15 per cent over the last five years (2009-2014), from 48 in 2009-10 to 84 in 2014-15. The number of cruise ships due to visit Melbourne during 2015-16 and 2016-17 are 90 per cent confirmed, but figures for 2017-18 and 2018-19 will see many more ships added to the schedule two years in advance. A number of bespoke cruise itineraries are being offered in partnership with high profile events, such as the Spring Racing Carnival, thereby boosting numbers.

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<sup>48</sup> *Aircraft movements through capital city airports to 2029-30*, Bureau of Infrastructure, Transport and Regional Economics (BITRE), January 2010

**GOAL: THERE ARE MANY OPTIONS FOR GETTING TO MELBOURNE AND INFORMATION AVAILABLE DURING THE JOURNEY IS ENTICING**

Outcomes	Strategies and actions	Partners
<p>More cruise ships and international airlines travel to Melbourne.</p> <p>Visitors know what they can see and do when they arrive in Melbourne.</p>	<p><b>7. Increase passenger services to Melbourne</b></p> <ul style="list-style-type: none"> <li>• Advocate for bi-lateral agreements granting air services rights to international carriers from Melbourne’s priority visitor, student, trade and investment markets.</li> <li>• Reinvigorate ‘Team Melbourne in aviation’ and work with the Victorian State Government, Melbourne Airport and expatriate communities to attract new international airlines and more frequent air services to meet growing international visitor numbers.</li> <li>• Increase international air passenger demand to and from Melbourne by promoting Melbourne Airport’s ‘fly direct’ campaign to local companies, businesses and institutions.</li> <li>• As a member of Cruise Down Under, increase the number of cruise ships that visit Melbourne by promoting the city at trade expos and through other campaigns.</li> <li>• Work with partners such as the Victorian Racing Club, White Night and Tennis Australia to develop bespoke activities for cruise ship visitors.</li> <li>• Advocate for improved inter-city rail transport to Melbourne.</li> </ul> <p><b>8. Influence visitors’ plans for their time in Melbourne</b></p> <ul style="list-style-type: none"> <li>• Establish agreements with international airlines and cruise ship operators to ensure information about the city’s events, attractions and precincts are promoted through on-board briefings and in-flight magazines and DVDs.</li> <li>• As part of the digital action plan, create maps and other city content available on smart devices in languages of the airlines’ home countries, and customisable according to visitors’ interests.</li> </ul>	<p>Victorian State Government</p> <p>Tourism and events industries</p> <p>Melbourne Airport</p> <p>Southern Cross Station Management</p> <p>Port of Melbourne Corporation</p>

### Stage Three – On Arrival

#### **GOAL: THE FIRST IMPRESSIONS OF MELBOURNE ARE POSITIVE**

There is only one opportunity to make a first impression: arriving visitors are a 'captive' audience. Customs, transport (including taxis, airport transfer buses, and public transport options), accommodation, and visitor services can create the basis for a positive – or otherwise – experience.

Once visitors arrive in Melbourne they are mainly concerned with basic needs, such as transfers to connecting flights or finding their way to their accommodation. Arrival is also an important time to make contact with loved ones at home: "Hi, I've arrived!" Visitors should be able to access all their immediate orientation and transportation needs with ease.

The *Visitor Information Journey* research established that transport and getting around are the most sought after information topics on arrival, at 50 per cent of the total number surveyed. At this stage, visitors are looking for accessible wayfinding signage. This is followed closely by general information, where to eat, maps and visitor services. Arriving visitors generally switch to offline sources – they collect up-to-date printed tourism materials and ask questions of the close-at-hand professionals who work in the tourism sector, such as accommodation staff.

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**GOAL: THE FIRST IMPRESSIONS OF MELBOURNE ARE POSITIVE**

Outcomes	Strategies and actions	Partners
<p>Arriving visitors feel welcome.</p> <p>Arriving visitors have the maps and information they need to enjoy their visit.</p>	<p><b>9. Create a good first impression of Melbourne</b></p> <ul style="list-style-type: none"> <li>• Advocate for improved infrastructure and capacity to cater for the forecast increase in visitors arriving in Melbourne by air, sea and rail.</li> <li>• Work with Melbourne Airport, the Port of Melbourne Corporation and Southern Cross Station management to monitor and improve visitors' arrival experiences and sense of welcome.</li> <li>• Monitor visitors' feedback about the customer service standards of regulatory service and transport providers.</li> <li>• Work with taxi companies, public and private transport companies to ensure a high level knowledge of Melbourne, its attractions and precincts that delivers on Brand Melbourne's marketing 'promise'.</li> <li>• Work with Southern Cross Station management to improve orientation and wayfinding information for visitors arriving by SkyBus, interstate and regional trains and buses.</li> <li>• Support Public Transport Victoria promote use of Myki and its operation.</li> <li>• Help build visitors' excitement about their stay by displaying information about the city's festivals, events, exhibitions and entertainment at Melbourne's air, sea and rail terminals.</li> <li>• Work with VicRoads, Victoria Police and Public Transport Victoria to develop wayfinding signage that encourages safe, easy journeys between the city's entry points and its major sporting facilities.</li> </ul> <p><b>10. Assist arriving passengers orientate themselves and travel to their Melbourne destinations</b></p> <ul style="list-style-type: none"> <li>• Work with Melbourne's rail, air and sea terminal operators to ensure arriving visitors have ready access to maps, transport and visitor information within the arrival areas and available</li> </ul>	<p>Victorian State Government</p> <p>Tourism and events industries</p> <p>Tertiary education sector</p> <p>City businesses</p> <p>Melbourne Airport</p> <p>Southern Cross Station Management</p> <p>Port of Melbourne Corporation</p> <p>Victorian Visitor Information Centres (VIC) network</p>

	<p>in print, online and downloadable formats.</p> <ul style="list-style-type: none"><li>• Develop a Melbourne gateways signage program with Tourism Victoria, VicRoads, the cities of Hume and Port Phillip to welcome visitors to Melbourne and help them explore the destination.</li></ul> <p><b>11. Promote the City of Melbourne’s visitor services and the State’s Visitor Information Centre network</b></p> <ul style="list-style-type: none"><li>• Promote Victoria’s accredited, state-wide network of Visitor Information Centres (VICs) at Melbourne’s visitor gateways.</li><li>• Promote the City of Melbourne’s multi-lingual visitor information services at Melbourne’s gateways as the best place for local, insider information.</li></ul> <p><b>12. Provide a warm welcome to arriving cruise ship passengers and crew</b></p> <ul style="list-style-type: none"><li>• Provide visitor information and entertainment services for arriving cruise ship passengers and crew.</li><li>• Monitor the influence of the cruise ship visitor information service and satisfaction with the city as a destination.</li></ul>	
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## Stage Four – In Destination

### **GOAL: VISITORS LOVE MELBOURNE**

During their time in Melbourne, visitors delve deeper into things they can see and do – the *Visitor Information Journey* research confirmed that more sources of information are used at this stage than any other. Visitors alternate between complementary channels based on their immediate needs. They look for information about shopping; dining and restaurants; attractions; general information; what's on; transport and getting around; maps; regional Victoria; visitor services locations; traveller information; business intelligence; and accommodation. Engaging, 'tailor-made' information, available in a number of key languages, is a means of encouraging visitors to stay longer.

Melbourne's appeal as a place to visit, study, and stage conventions and major events is linked to the importance of the welcome extended to its visitors. A UK study found that 78 per cent of visitors who 'strongly agreed' they felt welcome in Britain, also 'strongly agreed' they would recommend the destination to family and friends. In contrast, of the visitors who merely 'agreed' (but not strongly) they felt welcome in Britain, just 20 per cent 'strongly agreed' that they would recommend it as a place to visit<sup>49</sup>.

At this stage of the journey, travellers who feel welcome are more likely to recommend Melbourne as a holiday destination – and word of mouth has more influence on destination choice than any other source of information. Melbourne needs to be *very* welcoming!

Conserving the city's streetscape and heritage, together with keeping it safe for everyone at all times of the day and night, will enhance the visitor experience. The city itself is becoming more dense and the impact of high-rise development on the city 'experience' and visitor navigation in terms of 'anchor points', landmarks and connections, must be monitored. Global warming has raised the issue of keeping cool in the city, and 'cool maps' showing the location of parks and gardens, urban forest and restful street furniture help keep visitors comfortable.

The city's regulatory framework, which addresses the importance of local laws and kerbside trading, for example, also plays an important role in maintaining Melbourne's appeal.

Consistent, current and well maintained wayfinding signage throughout the city – and leading visitors to other areas and across all available modes – must be available at this stage of the journey with a combination of both digital and printed maps<sup>50</sup>. Walking, public transport and bike share use should be encouraged through this signage, which makes it simple for travellers to navigate their way around and find their own Melbourne secrets.

As previously noted, the rate of growth forecast for visitors to Melbourne means it is critical that the city is able to provide sufficient accommodation. With 2014 occupancy rates in the city averaging 86 per cent, and at peak times being pushed to around 95 per cent, demand could soon outstrip supply in central Melbourne. The type of future accommodation is also important, with five-star rooms in heavy demand, particularly among the burgeoning Chinese market.

Travellers staying in the city depend on readily available free wi-fi connections to book flights, apply for jobs, search for events and find accommodation. Wi-fi acts as a 'support mechanism' for travellers, helping anchor them both materially and socially. Free wi-fi encourages people to stay longer in the city as they can use it to work, study or browse the web. It encourages

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<sup>49</sup> Welcome and the Visitor Experience, Visit Britain, 2009

<sup>50</sup> Visitor information and channel preferences, Nitty Gritty, December 2012

them to do more, as they can quickly and easily access information online about attractions, events and things to do.

The promise of free wi-fi is thought to attract visitors to a destination, due to the considerable saving it provides, as well as enabling travellers to stay in touch with friends and family. Free wi-fi also has a significant impact on accommodation choice, with visitors seeking out hotels that offer this service. Almost two-thirds of business travellers connect to the internet as soon as they enter their hotel room – even before they look around the room – as it is reported to help them feel more at home.

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**GOAL: VISITORS LOVE MELBOURNE**

Outcomes	Strategies and actions	Partners
<p>Visitors enjoy Melbourne's unique streetscape and friendly feel.</p> <p>Visitors are aware of the range of things to see and do in Melbourne.</p> <p>Investment in Melbourne's transport, accommodation and related infrastructure caters to the city's growing visitor numbers</p> <p>Visitors have many opportunities to engage with the city's rich offer.</p> <p>City of Melbourne's Capital City and Gateway roles benefit Melbourne and Victoria.</p> <p>Visitor yield is dispersed across the municipality.</p>	<p><b>13. Conserve and enhance Melbourne's streetscape</b></p> <ul style="list-style-type: none"> <li>• Encourage and approve development that enhances the city's streetscape, liveability and walkability; in particular the city's network of laneways, permeable fabric, scale and quality.</li> <li>• Enhance the city's liveability by creating a network of 'pocket' parks and open spaces and expanding the city's 'urban forest'.</li> <li>• Maintain local laws that enable kerbside trading, key-hole bars, cafés and retail spaces, and that ensure the city is green and clean.</li> <li>• Ensure the city's visitor infrastructure (wayfinding signs, banners and street furniture) is strategically located, adds to the city's sense of welcome and is well maintained.</li> </ul> <p><b>14. Support investment in visitor transport, accommodation and infrastructure</b></p> <ul style="list-style-type: none"> <li>• Work with the Victorian State Government to develop a coordinated approach to planning which encourages tourism investment.</li> <li>• Develop policy and easily accessible information that responds to the expansion of home sharing in the city and encourages good quality, legally compliant growth in this sector.</li> <li>• Work with the Victorian State Government to improve management and promotion of the Yarra River and the city's waterways.</li> <li>• Work with the Victorian State Government to develop a water ferry service that operates year-round between Docklands and the upper Yarra River.</li> <li>• Work with the Victorian State Government and industry to review the infrastructure, facilities, standards and amenities required to support water transport services and the forecast growth in visitors entering the city through Southern Cross Station.</li> <li>• Work with Yarra Trams to create an art tramline through the city, and assist it with promotion</li> </ul>	<p>Victorian State Government</p> <p>Tourism and events industries</p> <p>Tertiary education sector</p> <p>City businesses</p> <p>Public transport operators</p> <p>Victorian Visitor Information Centres (VIC) network</p>



and delivery of other 'themed' lines.

- Improve the connectivity of transport services used by visitors, including the Melbourne Visitor Shuttle and the City Circle Tram.

**15. Provide information services to spike visitor curiosity and encourage them to explore the city**

- Deliver customised visitor information through a network of fixed and mobile operations – in strategic locations across the municipality; at major events and conferences; and through digital and online channels.
- Ensure information caters to the interests of different market segments by monitoring Tourism Research Australia (TRA) data and regularly surveying visitor services users, staff, volunteers and industry operators.
- Support the city's concierge network by providing city maps and information in a range of formats and languages.
- Develop a workforce plan that aligns staff and volunteer recruitment – their profile, skills and languages – with Melbourne's visitor markets, interests and preferred information channels.
- Provide free wi-fi at all City of Melbourne visitor information services, including the Melbourne Visitor Shuttle, and support the development of mobile-friendly technology for in-demand information.
- Ensure the best possible environmental and social responsibility standards are adopted by City of Melbourne's visitor services network, its staff, volunteers and users.
- Deliver a program of events for local visitors and tourists and support the delivery of events through the Event Partnership Program.

**16. Make it easy to get around Melbourne and Victoria**

- Work with metropolitan councils to improve wayfinding signage in Melbourne: its design, placement and value to users.

- Work with State and local government authorities to develop a basemap for use in metropolitan Melbourne’s wayfinding signage systems; one that encourages visitors to explore the city by walking, cycling and public transport.
  - Develop digital wayfinding that complements the city’s physical signage system and aids visitors with vision, hearing and other impairments.
  - Create an integrated suite of Melbourne visitor maps by adapting the basemap for printed, online, digital and mobile channels.
  - Work with developers to use hoardings/skins to improve the city’s streetscape, for example, to feature orientation maps and images on the finished building (such as The GPO building).
  - Improve the city’s visitor infrastructure, for example, services to support water transport along the Yarra River, visitors with disabilities, tour operators and the city as a safe, late-night destination.
  - Support construction of Melbourne Metro Rail, working with the Victorian State Government to minimise disruption, maximise activation and keep visitors informed about developments and changes to transport routes during the build.
  - Encourage travel between Melbourne and regional Victoria by integrating the City of Melbourne’s visitor services – its information, product and booking systems – with the State’s Visitor Information Centre (VIC) network.
  - Work with regional Victorian VICs to build a shared inventory of accommodation and touring products that encourages travel between Melbourne and major regional Victorian centres and is available for sale through the VIC network.
- 17. Improve tourism service levels and standards and engage better with business**
- Work with visitors, business, industry, government and event organisers to contribute to the City Of Melbourne’s Eco City goal and 2020 Zero Net Emissions target by improving energy efficiency and use of renewable sources, and by reducing waste.
  - Help visitors to cope with Melbourne’s extreme heat days (in a similar to the Northern

Hemisphere's 'snow days').

- Support the cultural awareness programs offered by the Australian Tourism Export Council (ATEC) and Destination Melbourne.
- Work with Inner Melbourne Action Plan (IMAP) councils on projects that build visitation to the inner Melbourne region and strengthen its visitor infrastructure and customer service standards.

**18. Assist business development that makes it easy for visitors to connect with the city and its businesses, precincts and attractions**

- Assist businesses and institutions develop information and products that support Melbourne's designation as a UNESCO City of Literature, together with the city's strengths in the knowledge, music, performing arts and creative sectors.
- Evaluate the value of tourism to the city economy (Gross Local Product) and communicate regularly with city businesses and precinct associations.
- Share City of Melbourne information through open data platforms to encourage the development of apps and other innovations that will generate business and assist visitors.
- Establish a tourism-specific element of the Small Business Grants program to support the development of tourism-related small businesses and encourage innovation, for example, the development of tourism-related business 'clusters'.
- Continue to designate and conserve precincts of heritage and cultural significance, including sites of significance to local Indigenous communities, Chinatown, Lonsdale Street, Lygon Street, the Royal Exhibition Building and the city's parks and gardens.
- Develop a city activation program that encourages delegates to Melbourne's business events to extend their stay, bring their partners, explore the city, visit its shopping and dining precincts, bars and restaurants, and attend its theatre, events and festivals.

## Stage Five – Departure/Return Home

### **GOAL: VISITORS TELL THEIR FRIENDS AND FAMILY TO VISIT MELBOURNE – AND PLAN TO RETURN THEMSELVES**

On departure, visitors use social media, updating Facebook and Twitter, to share positive experiences with their friends and colleagues and to offer their opinions and recommendations. All ages are active on social media, from all countries. Over half of visitors who use social media upload reviews on departure.

On returning home, visitors continue to post reviews, update Facebook and upload photographs. These visitor reviews and feedback about Melbourne are then used by others to plan their trips, with 78 per cent of visitors to Melbourne using social media before their trip to seek reviews of hotels and other visitor experiences, and 72 per cent viewing advice and tips posted across social media by friends, family and fellow visitors.

Wherever travellers have touched visitor services by providing contact details, those services should be encouraged to connect with them on their return home with a view to inspiring future visits to Melbourne and word-of-mouth recommendations to family and friends. The main aim of the Plan is to make sure that all stages of the journey focus on achieving the best possible visitor experience for all visitors, and the departure/return home stage of the visitor information journey is pivotal to the success – or otherwise – of this aim.

**GOAL: VISITORS TELL THEIR FRIENDS AND FAMILY TO VISIT MELBOURNE – AND PLAN TO RETURN THEMSELVES**

Outcomes	Strategies and actions	Partners
<p>Improvements to City of Melbourne’s visitor services are informed by users’ perceptions of the value and influence of the network.</p> <p>City of Melbourne’s tourism planning is informed by regular research and program evaluation.</p> <p>User-generated information and recommendations about Melbourne are readily available.</p>	<p><b>19. Strengthen the value and influence of City of Melbourne’s visitor services network</b></p> <ul style="list-style-type: none"> <li>• Monitor consumers’ changing preferences for visitor information: type, formats and channels.</li> <li>• Conduct four-yearly post-visit surveys of users of City of Melbourne visitor services: what they value about the services, their influence and satisfaction.</li> <li>• Undertake four-yearly reviews of City of Melbourne’s visitor services: the organisation’s role in visitor information, servicing priority visitor markets, information delivery channels/platforms, service locations, and training and workforce requirements.</li> </ul> <p><b>20. Regularly review the City of Melbourne’s role in the tourism industry</b></p> <ul style="list-style-type: none"> <li>• Establish annual benchmarks to measure/predict tourism trends.</li> <li>• Incorporate past visitor suggestions and experiences into printed and online media alongside local knowledge and experience.</li> </ul> <p><b>21. Encourage departing visitors to share their opinions and recommendations about a visit to Melbourne</b></p> <ul style="list-style-type: none"> <li>• Monitor TRA surveys of departing visitors for areas of influence and improvement: visitors’ activities in Melbourne, expenditure and length of stay (do more, spend more and stay longer).</li> <li>• As part of the visitor services digital strategy, establish social media channels for visitors to share information, opinions, recommendations and images of Melbourne.</li> <li>• Make user-generated opinions and recommendations available as a source of advice for users of the visitor services network.</li> </ul>	<p>Melbourne Airport</p> <p>Southern Cross Station Management</p> <p>Port of Melbourne Corporation</p>

	<ul style="list-style-type: none"><li>• Work with airport, rail and cruise ship terminal operators to encourage departing visitors to post their opinions and advice about a visit to Melbourne.</li></ul>	
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