COMMITTEE FOR
MELBOURNE

Championing the Visitor Experience for Greater Melbourne

Shaping Melbourne's future

Clive Dwyer

Director, Engagement
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Shaping Melbourne's future

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Executive Officer
Western Melbourne Tourism

Committee for Melbourne Forum

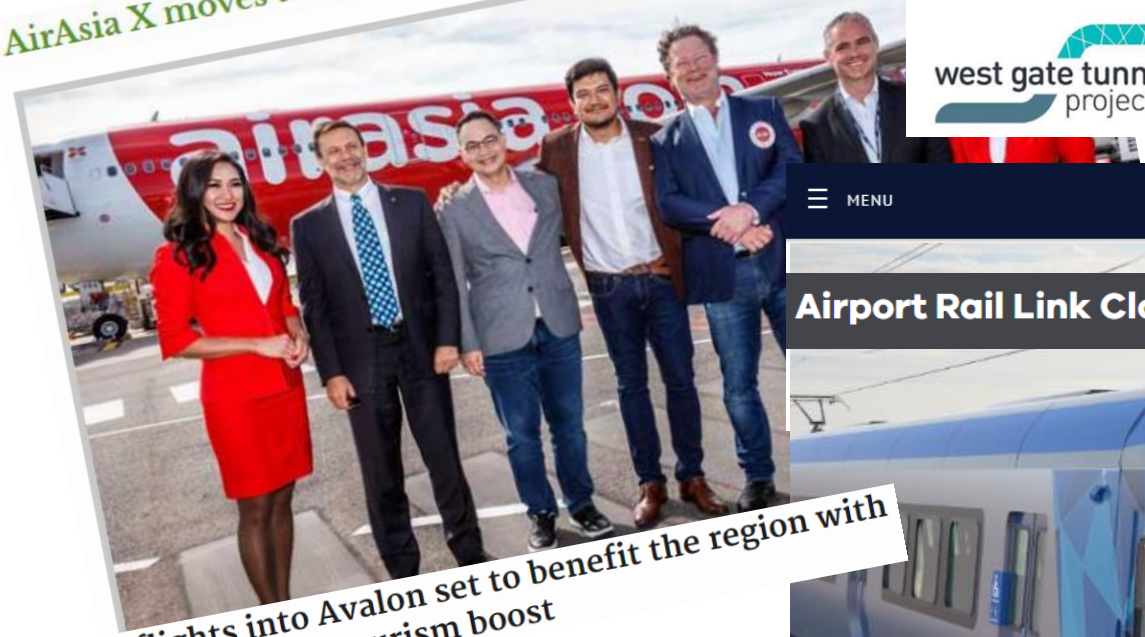
Championing the Visitor Experience for Greater Melbourne

Richard Ponsford
Executive Officer, Western Melbourne Tourism
Wednesday 20 November

melbourne's west

VietJet To Call Avalon Home, More Jobs For Victoria

AirAsia X moves to Melbourne Avalon



AirAsia flights into Avalon set to benefit the region with experts predicting a tourism boost

Better and safer cycling paths for Melbourne's west

west gate tunnel project

SkyBus

SkyBus announces new services covering more Victorian suburbs

4 June 2018

SkyBus

MENU THE AGE

Airport Rail Link Closer To Takeoff As Joint Agreement Signed

A WORLD-CLASS AIRPORT LINK FOR VICTORIA

#START WEST launchvic

You might have seen the PWC report City Pulse published in the Herald Sun last week. This report reinforces our work in encouraging metropolitan dispersal and supports our theme of having a Global Village. Lots of opportunities for the visitor economy ahead in the west!

The great western growth race

MENU THE AGE SUBSCRIBE

'Game-changer': Melbourne's proposed airport rail line could transfo

$130 million upgrade to Flemington Racecourse

The VRC has unveiled its new club stand at Flemington Racecourse, at a cost of $130 million.

Added Sep 10th, 2018

Footscray

Time Out

Time Out Worldwide has named Footscray as the **13th coolest neighbourhood** in the world right now.

Compiled with the help of local Time Out editors and experts, ranks 50 of the planet's cultural and culinary hotspots.

Footscray was the only Melbourne suburb to make the list.

Footscray has been named one of the coolest neighbourhoods in the world

Photograph: Kristoffer Paulsen

As one Footscray resident put it: "It's multicultural, has great bars and food, and it's cheap(er) and has fewer annoying wanker bros than other parts of the city." Read about some of our favourite things to do in Footscray right now.

Context of Western Melbourne Tourism

Council Partners

Other Board Partners

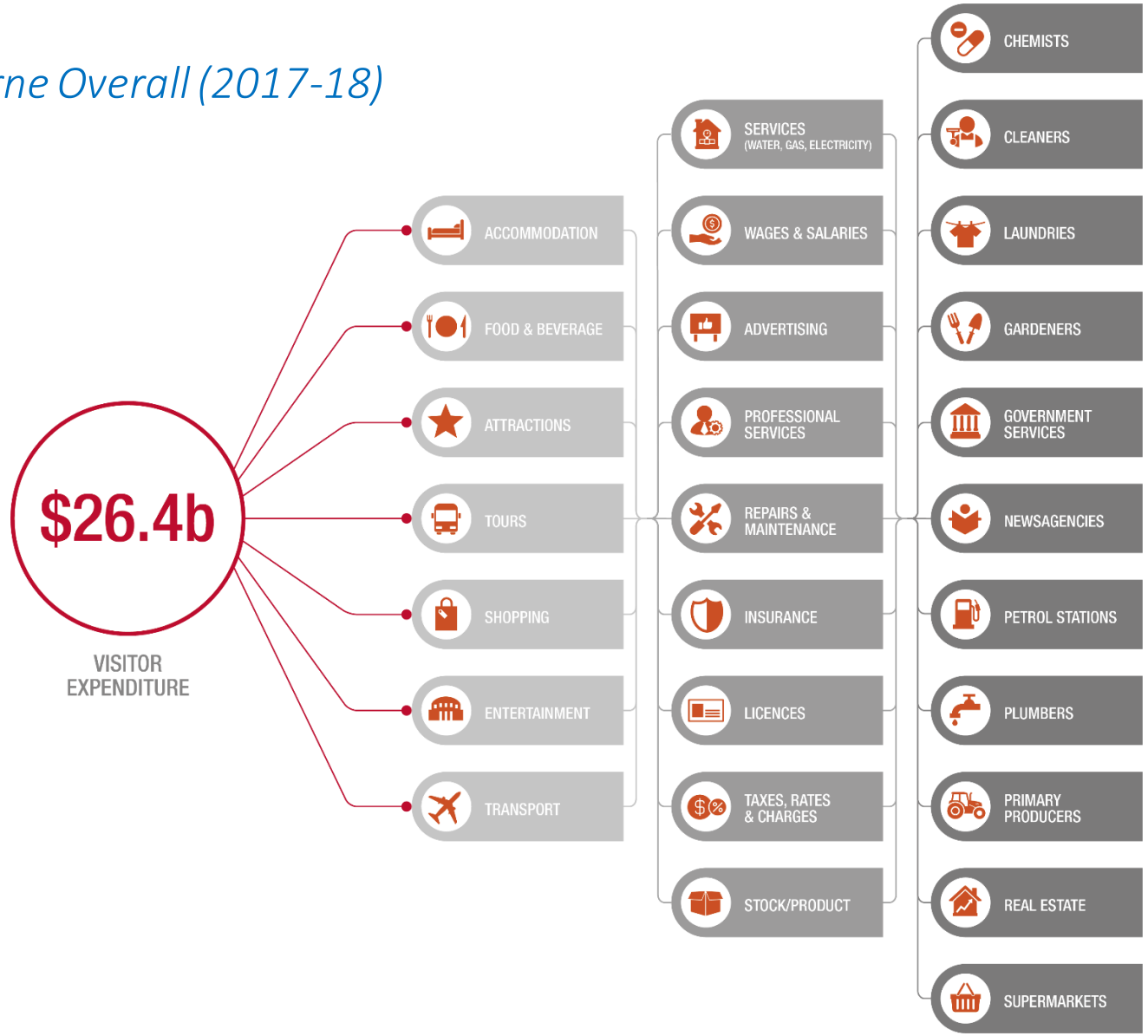
Economic value of tourism

Economic Output - *West vs Melbourne Overall (2017-18)*

WHAT VALUE DO VISITORS BRING?

$1.45b

THE VISITOR ECONOMY WAS ESTIMATED TO BE VALUED AT $1.45 BILLION.

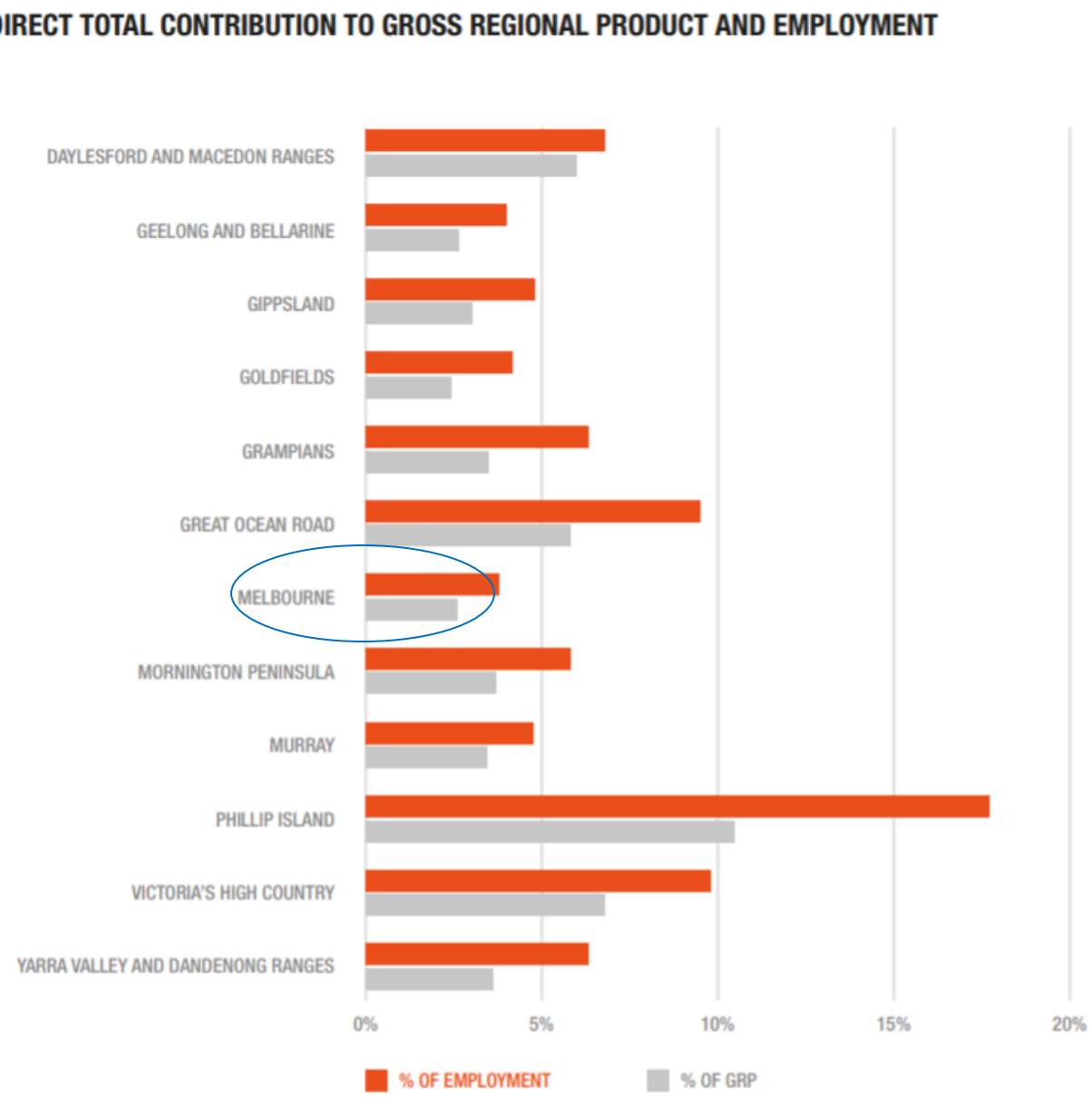


- Share of the jobs in Melbourne's west is **approx 4.5% or approximately 12,000 jobs (Source : REMPLAN)**

- Significant potential to grow yield with more accommodation, attractions and events.

Economic Narrative

Melbourne compared with the tourism regions of Victoria (as % of local GRP and Employment)



Melbourne’s west visitor profile

HOW MANY VISITORS DO WE HAVE?

4.1m

MELBOURNE'S WEST ATTRACTED 4.1 MILLION VISITORS IN 2018
(12.8% of Greater Melbourne's visitation).

76% DAY VISITORS

19% DOMESTIC OVERNIGHT

5% INTERNATIONAL

WHAT IS THEIR REASON FOR VISITING?

JUST OVER **1/2** OF VISITORS ARE VISITING FRIENDS & RELATIVES (VFR).

51% VFR

33% HOLIDAY

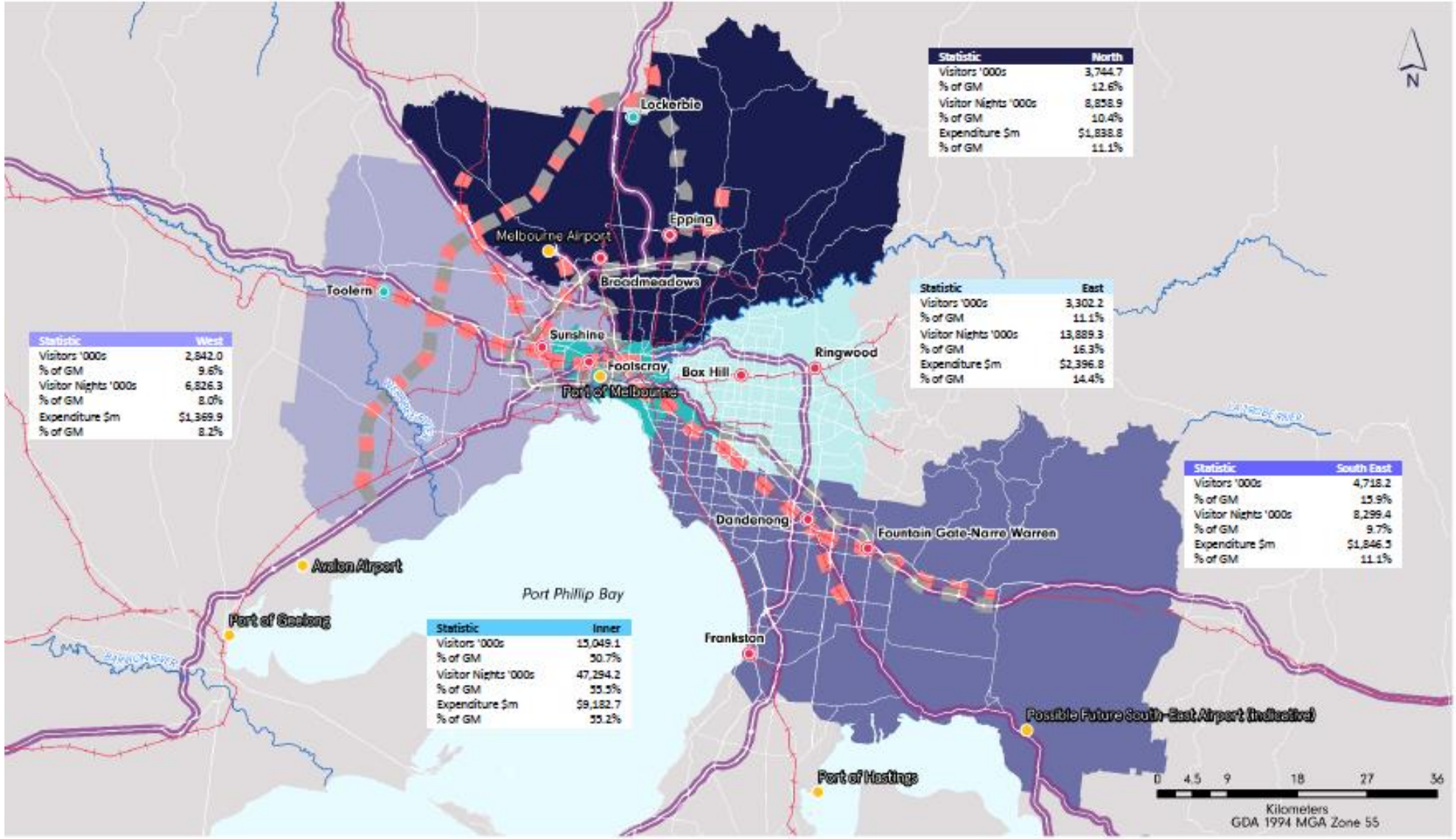
10% BUSINESS

6% OTHER

Source: Tourism Research Australia year ending December 2018.

Greater Melbourne Visitor distribution

Visitor Nos & Distribution



Legend

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

AEC OUTCOME DRIVEN

Notes:

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

Visitor Nos. Melbourne '000s

Inner	15,049	50.7%
South East	4,718.2	15.9%
East	3,302.2	11.1%
North	3,744.7	12.6%
West	2,842	9.6%
TOTAL (se,e,n,w)	**14,607**	**49.2%**

Visitor Nights Melbourne '000s

Inner	47,294.2	55.5%
South East	8,299.4	9.7%
East	13,889.3	16.3%
North	8,858.9	10.4%
West	6,826.3	8.0%
TOTAL (se,e,n,w)	**37,873.9**	**44.4%**

Approximately half of all Melbourne visitors are dispersing beyond inner Melbourne

Visitor Expenditure $M

Inner	9,182.7	55.2%
South East	1,846.5	11.1%
East	2,396.8	14.4%
North	1,838.8	11.2%
West	1,369.9	8.2%
TOTAL (se,e,n,w)	**7,452**	**44.8%**

Total Visitors (Melbourne Region) 2016 -17 – **29.3 million**

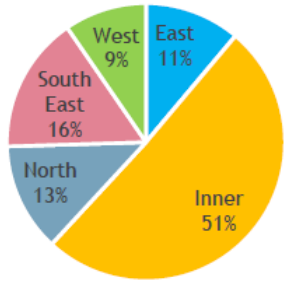
Total Visitor Nights (Melbourne Region) - **85.1 million**

Growth Outlook 2016/17 – 2026/27

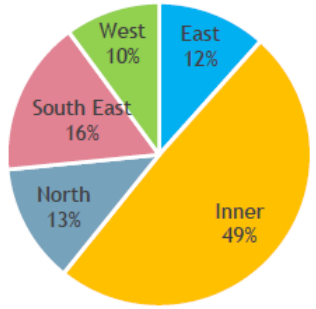
How do we compare?

- **Largest share remains with Inner Melbourne, but with an increasing share by all metro regions**

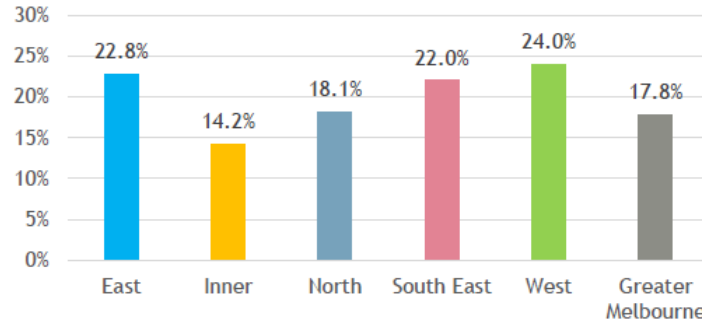
% share of visitors in Greater Melbourne: 2016/17



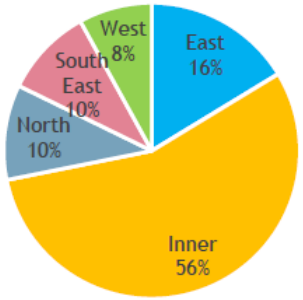
% share of visitors in Greater Melbourne: 2026/27



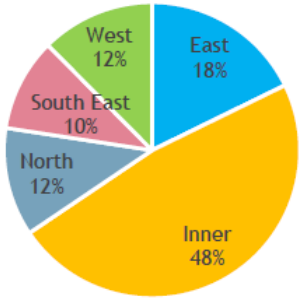
Estimated growth in visitors: 2016/17 - 2026/17



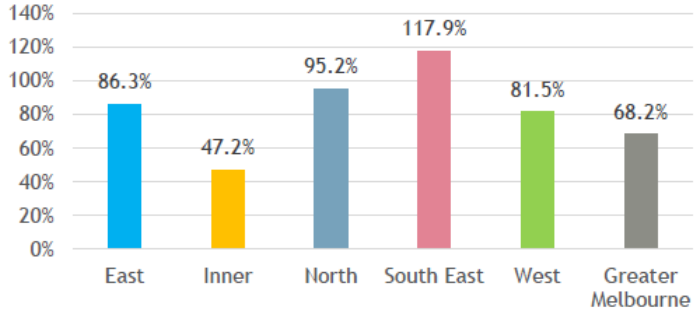
% share of visitors nights in Greater Melbourne: 2016/2017



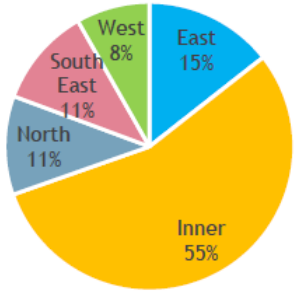
% share of visitor nights in Greater Melbourne: 2026/27



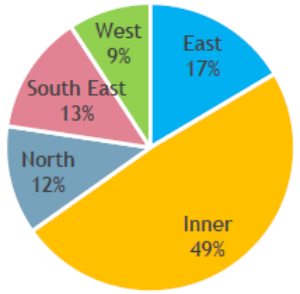
Estimated growth in visitor nights: 2016/17 - 206-27



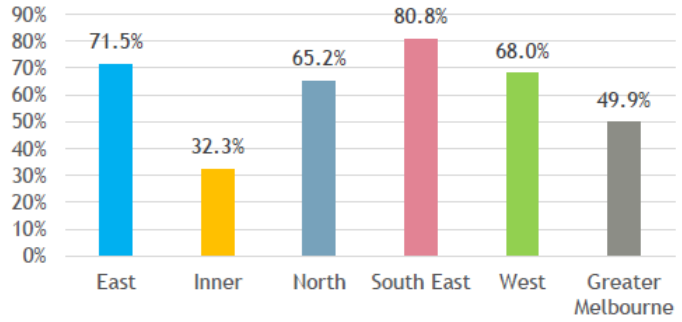
% share of visitor expenditure in Greater Melbourne: 2016/17



% share of visitor expenditure in Greater Melbourne: 2026/27



Estimated growth in visitor expenditure: 2016/17 - 2026-27



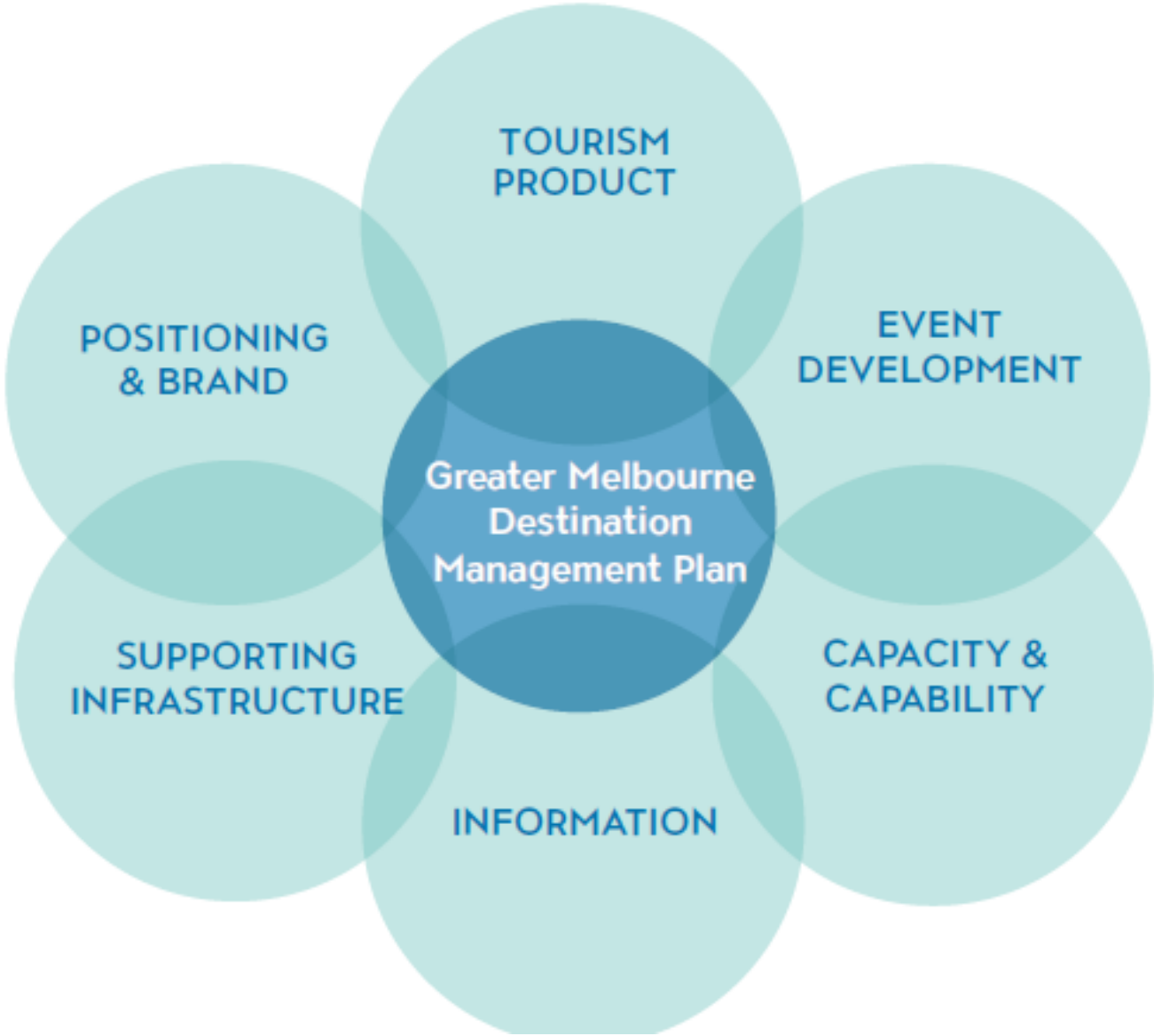
Source: TRA (NVS & IVS,2017), TRA forecasts (2017) & AEC analysis

Greater Melbourne
Destination Management Visitor Plan

Destination Melbourne
2018

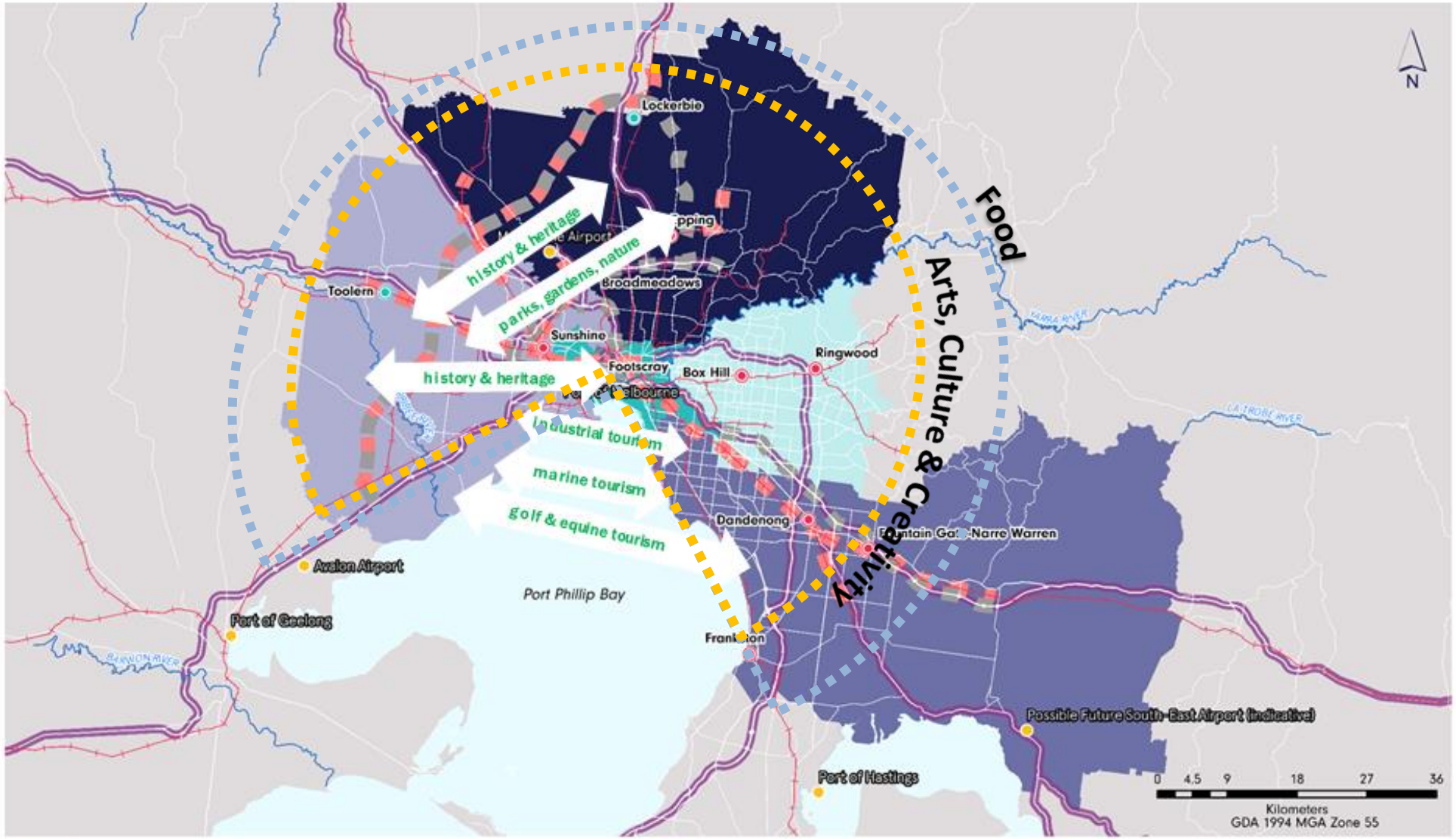
AEC
OUTCOME DRIVEN

DESTINATION MELBOURNE



DESTINATION MELBOURNE

AEC



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DESTINATION MELBOURNE

AEC OUTCOME DRIVEN

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Rail and Road Initiative: © DEDJTR 2017
Watercourse: © DELWP 2017

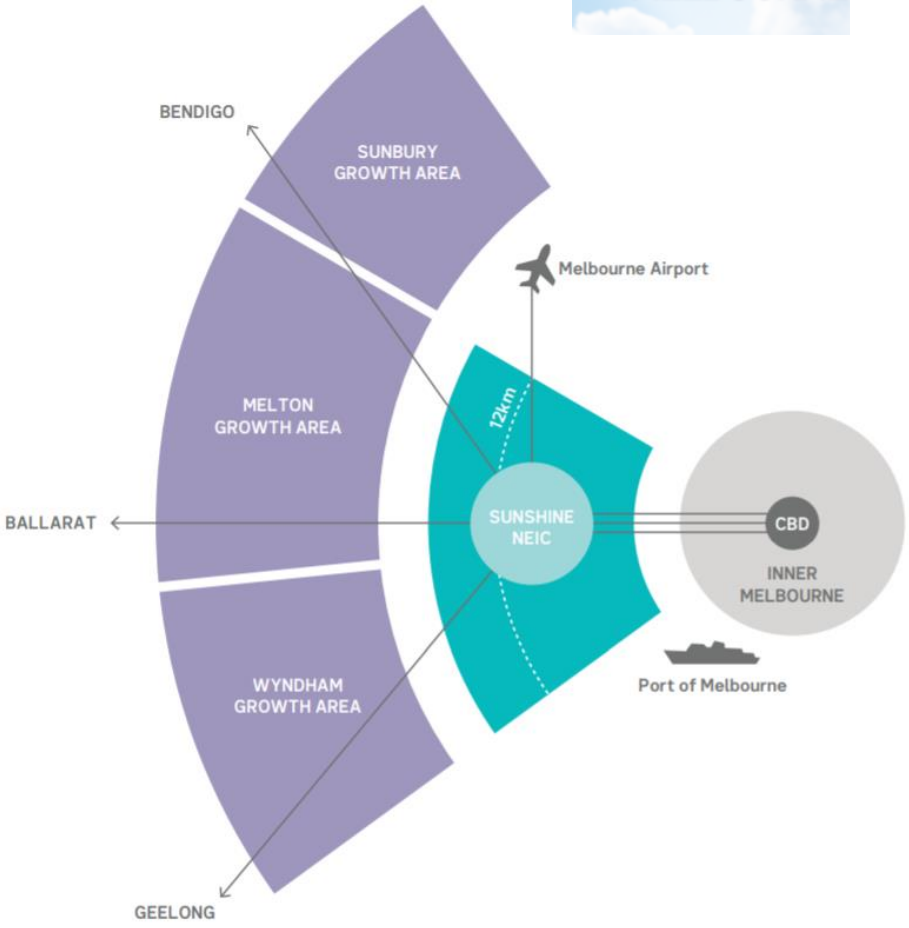
Infrastructure for growth

Avalon Airport

- **Gateway profile and information**
- **Positioning Avalon as an international airport gateway into Asia for Melbourne's west (ie not just Geelong)**
- **Inbound packaging opportunities for regional attractions , accommodation etc**

Melbourne Airport Rail Link

- **Sunshine will be the new visitor locus in the west**
- **Millions of visitors traversing and connecting in the region**
- **Capture traffic – evolve from a hub to a destination**

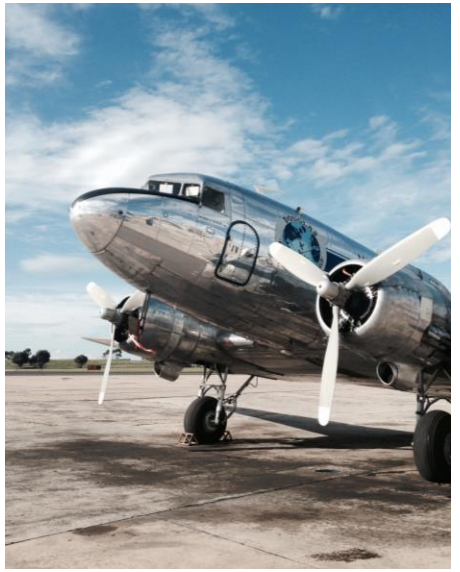


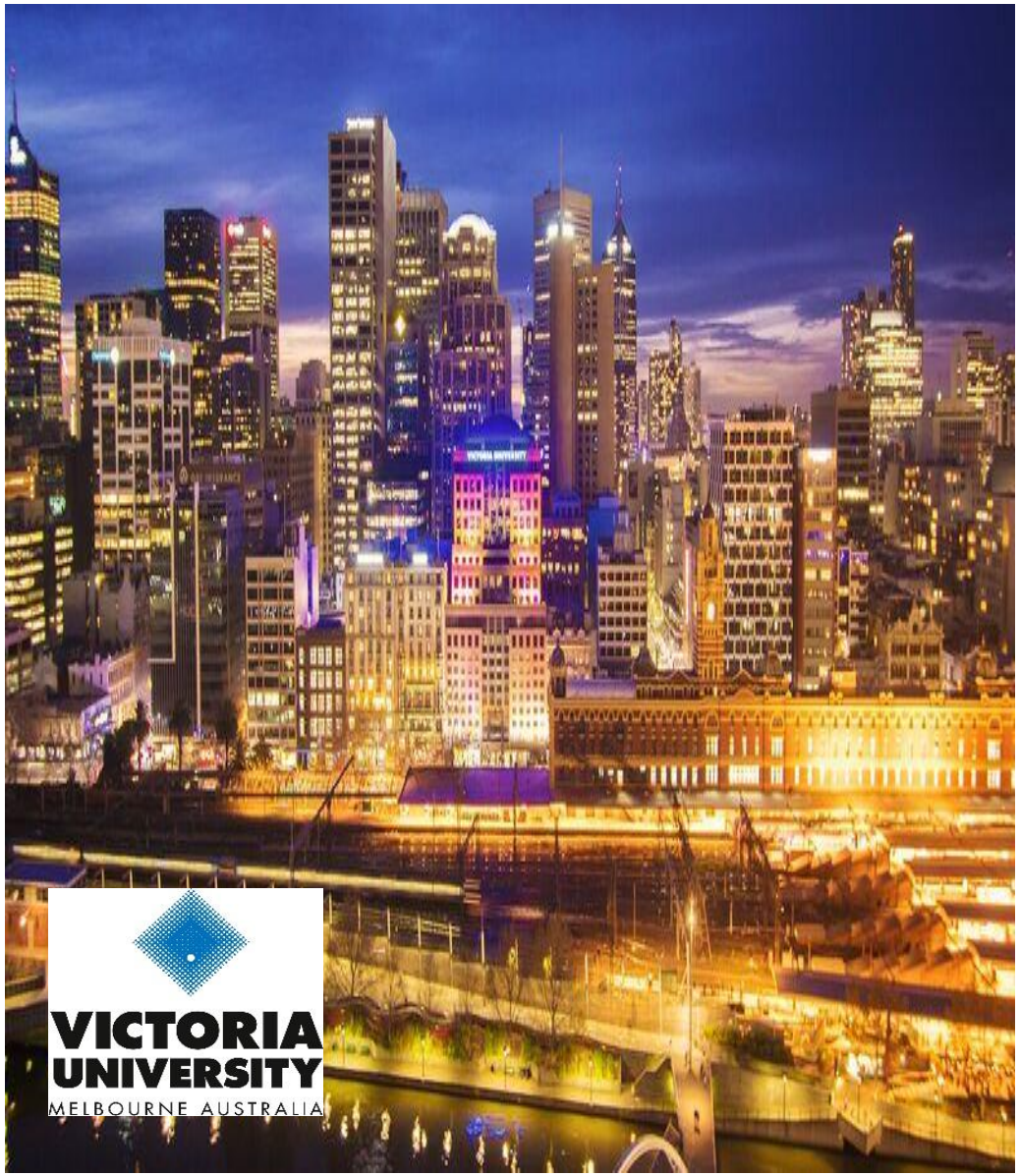
Westgate Tunnel Project

- **A new gateway to Melbourne and the west**
- **‘Community offset’ development including cycling trails**
- **New signage and wayfaring opportunities**

ESSENDON FIELDS

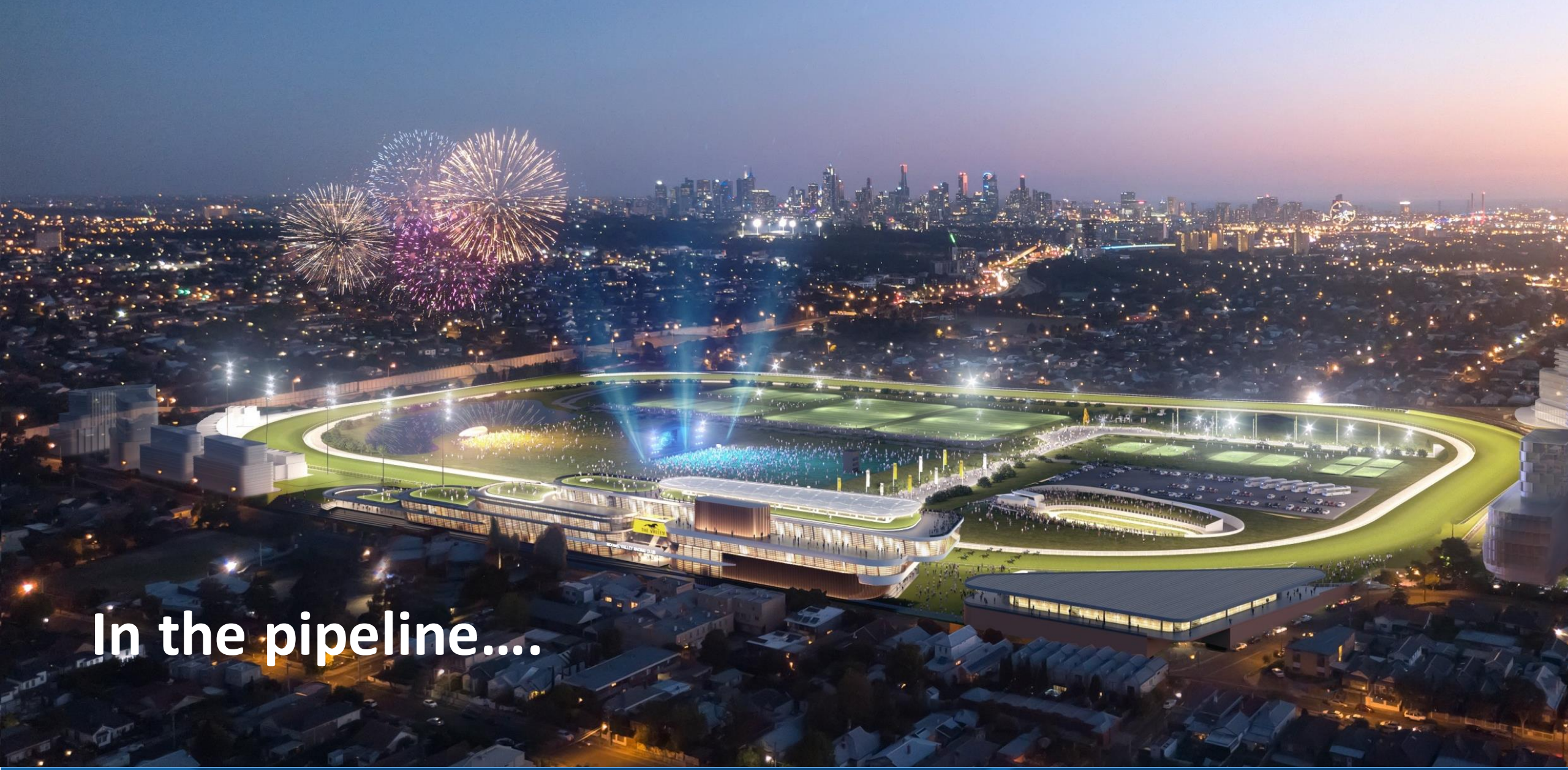
- Growing shopping, dining, entertainment and flight experience offer
- Melbourne's first indoor skydiving centre, iFly opened November 2019 ($15 mill)
- Australian Event Centre at Hyatt Place catering to large scale conferences of up to 1700 guests
- Upgraded regional airport gateway terminal





Victoria University launches the School for the Visitor Economy

A new cross-university school will provide the tourism, hospitality and events industries with qualified professionals to support rapid growth across the sector.



In the pipeline….

Werribee Open Range Zoo Master Plan : *Transforming from Two to Six Experiences*

- Capable of engaging 1,500,000 visitors per year
- Mixture of vehicle and walking safaris – new dimensions of experience and engagement with wildlife, including new home for Melbourne Zoo's elephant herd
- Tourism outcomes greatly enhanced
- $2 million already received from State Govt – Est Project Value: **$86 mill**

ZOOS VICTORIA

FIGHTING EXTINCTION ZOOS VICTORIA

NATIONAL MUSEUM FOR THE FUTURE

A world-class museum in Spotswood

- A first of its kind
- Interpreting transformational change
- Focused on science, technology, engineering and maths
- Bringing together opportunities to support entrepreneurship

2025 National Museum for the Future

SCIENCE + TECH CAMPUS

Visit – Work – Learn

The National Museum for the Future will be an anchor for a science and technology campus that combines commercial, educational and cultural activities.

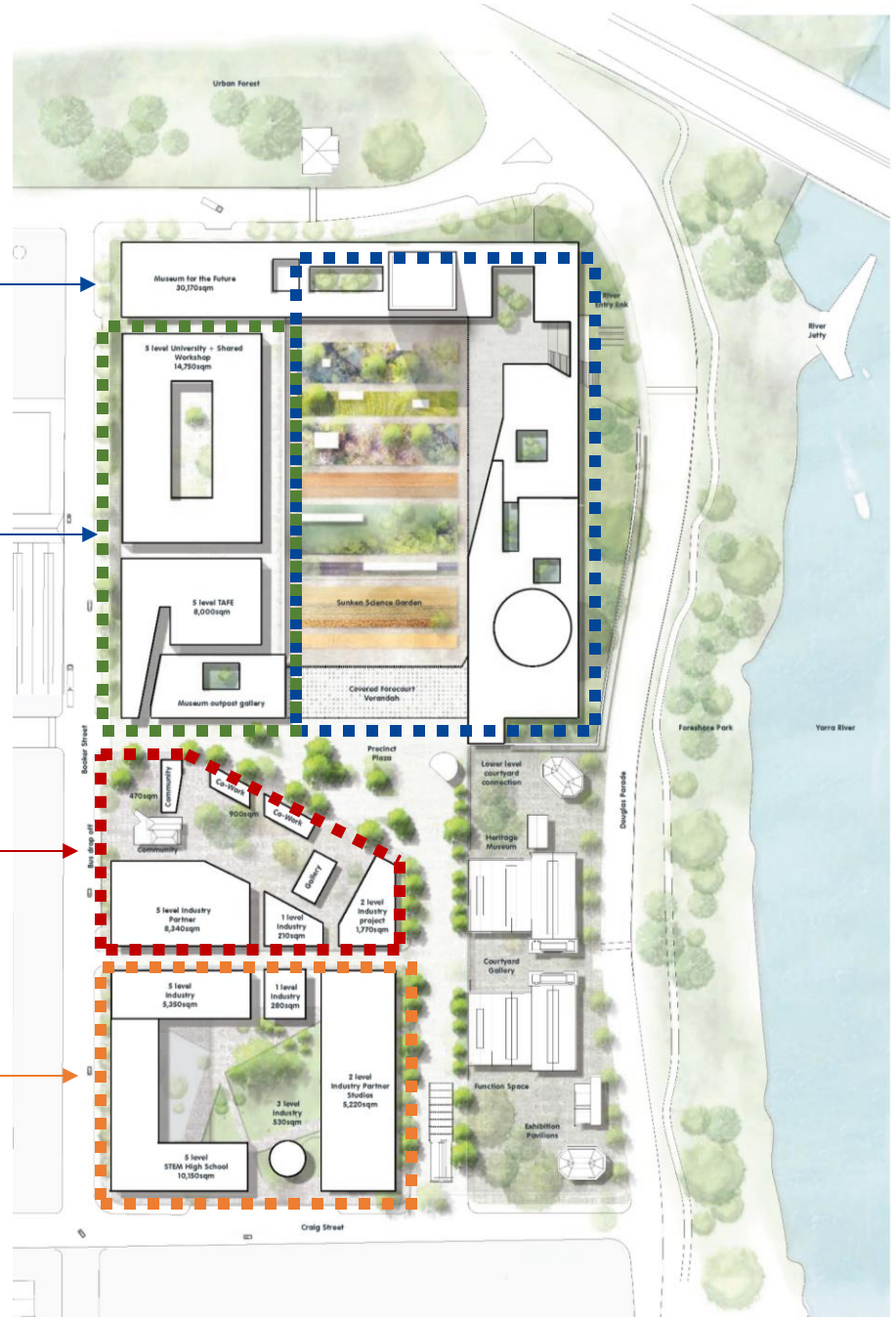
This has the potential to become a globally distinctive hub that will strengthen Melbourne's emerging innovation network.

NATIONAL MUSEUM FOR THE FUTURE

UNIVERSITY & TAFE

FUTURE INDUSTRY

STEM SCHOOL



MUSEUM DISTRICT

CREATE in an innovative neighbourhood

GRAZELAND

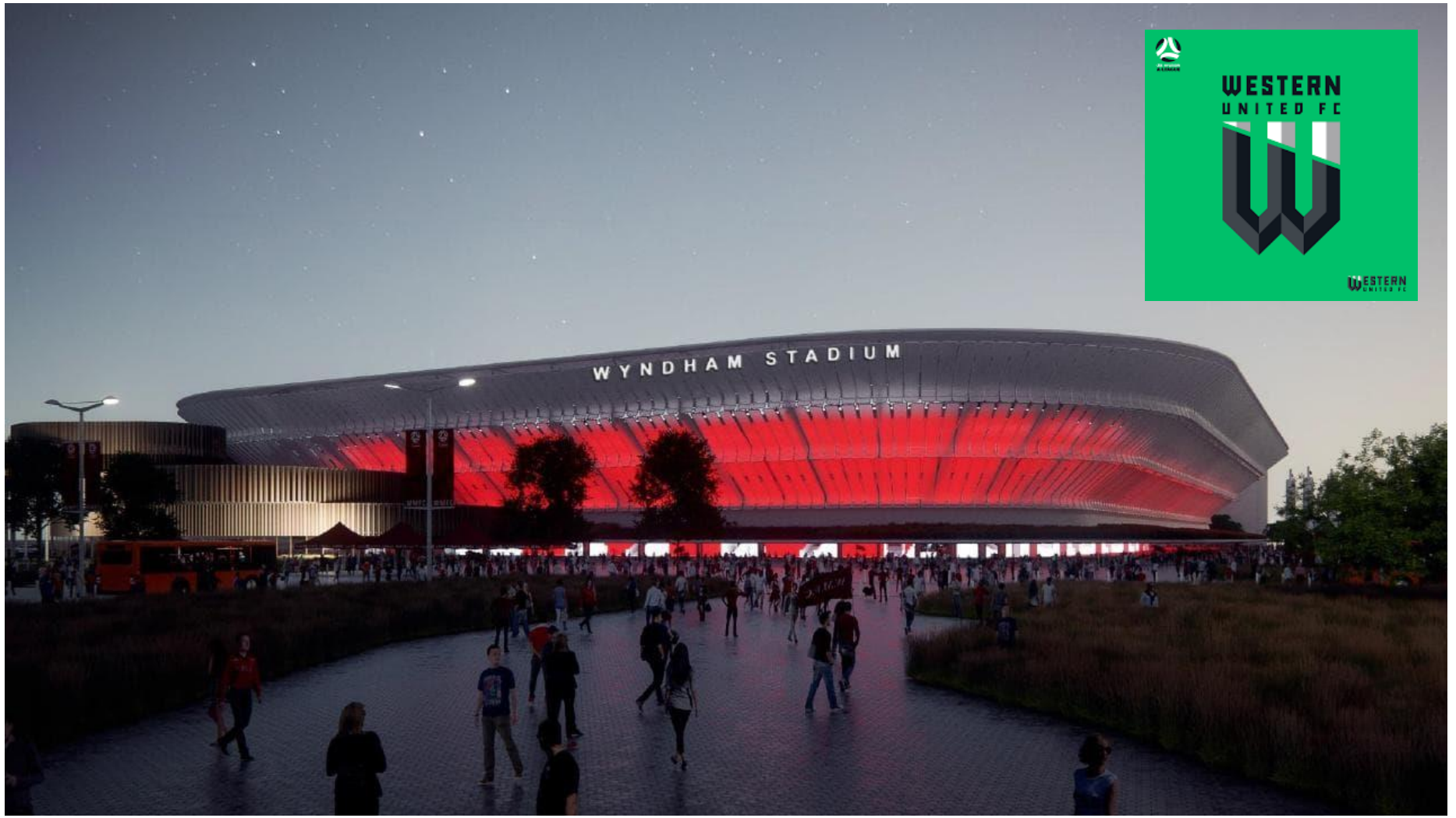
A Festival of Food

- A new culinary destination - opening March 2020
- Expected to attract 30,000 people a week
- 50 food outlets/ 3 licensed bars
- Artisan stalls of handmade and locally-designed products
- Activation and live on-stage entertainment, roving artists and performers
- Architect-designed by Push Projects, Grazeland's footprint will be more than 10,000 square metres (land leased from Museum Victoria and adjacent to Scienceworks)

An artist's impression of the Grazeland food precinct to be created at Spotswood.

Moonee Valley Racecourse – The Vision for the Valley

- New grandstand development
- A world best night racing venue
- Reoriented racetrack
- Infield entertainment and activation
- Residential precinct
- New community, business, recreation and leisure facilities

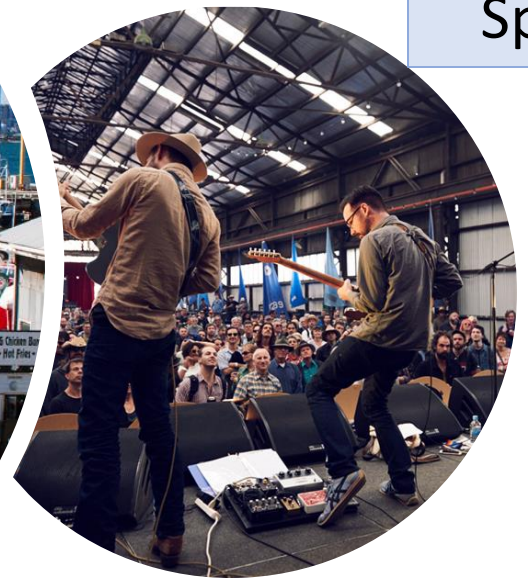


A home for Melbourne's newest A-League franchise –Western United

New Stadium and Sports Precinct at Tarneit

WESTERN MELBOURNE GROUP

Seaworks at Williamstown – Strategic waterfront development



Event Space

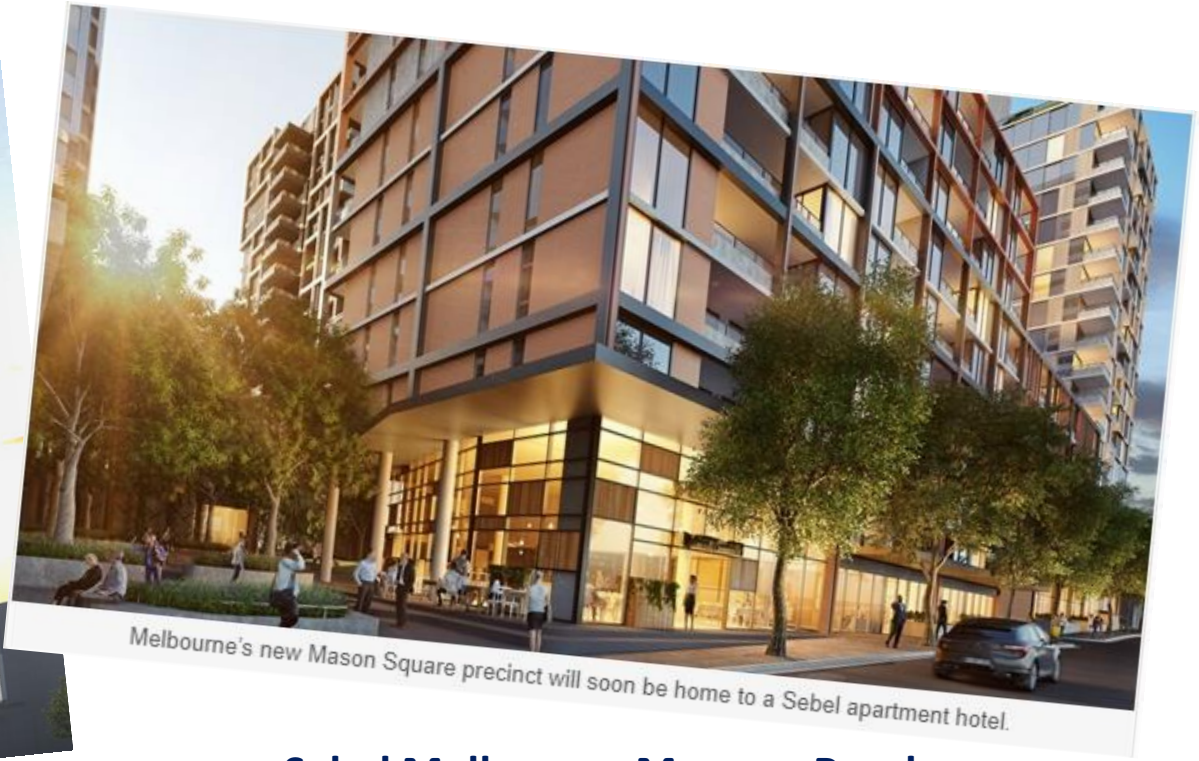
Maritime Museum

Three Piers
Connectivity to Melbourne CBD and Regional Victoria

Maritime Industries

Accommodation Supply

Holiday Inn Werribee
(Intercontinental /Pelligra/Citinova)
150 Rooms
Retail/ Office
Function Space (400pax)
$50 Million / Open in 3 years


Melbourne's new Mason Square precinct will soon be home to a Sebel apartment hotel.

Sebel Melbourne Moonee Ponds
97 apartments
Opened - November 2019

To conclude:

- **Narrative and identity of our neighbourhoods**
- **Data/ research to articulate the opportunities for dispersal and the value of ‘new’ money**
- **Experiences, not LGA’s**
- **Galvanise a commitment across Greater Melbourne**
- **Needing collaboration and ‘curators’ of experience**

What is the right model for collaboration?

Ladbrokes
Ladbr
8
WINX

ART
DUS

Winter Fest

Connect With Us

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/MelbsWest

@love_the_west

Chris James

Executive Director
Northlink

FOOD MELBOURNE'S NORTH
Food | Beverage | Fibre

NORTHLink
Networking for Economic Development

North & West Melbourne Data Analytics Hub

Championing the Visitor Experience for Greater Melbourne

Committee for Melbourne

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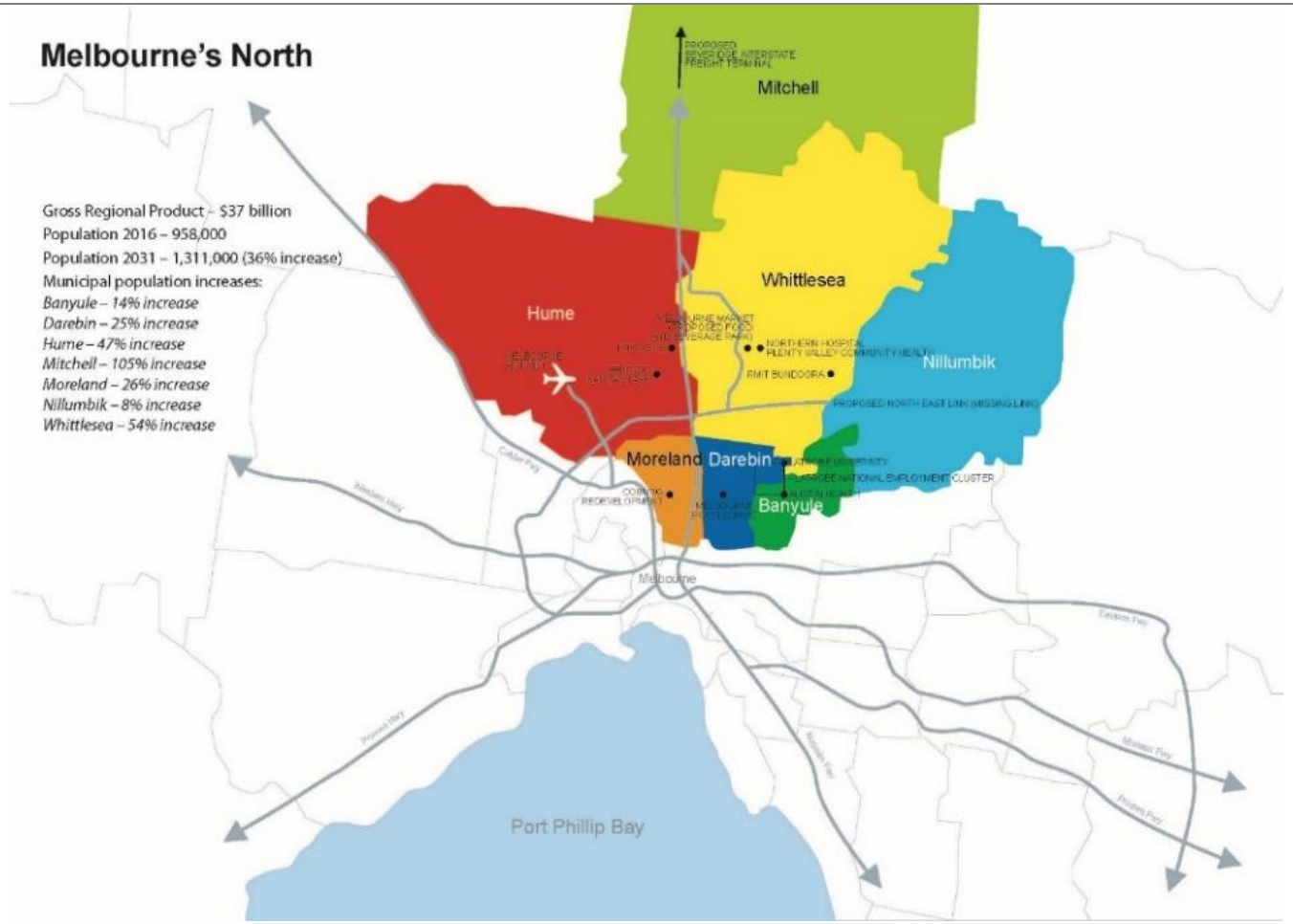
20 November 2019

Melbourne's North



NORTH Link – Who we are

NORTH Link is a regional partnership of industry, education and government established in 1995

Focus on business networking and regional economic development

Represents Melbourne's northern region comprising local Councils, local tertiary education institutions (including La Trobe University, RMIT University) and industry (eg. Melbourne Airport, Northern Health, Yarra Valley Water, Jemena, Melbourne Market Authority, etc.)

Services 5,000 SMEs

NORTH Link members

NORTH Link – What we do

Research/policy – *Northern Horizons, Future Workforce*

Advocacy – Melbourne Wholesale Market, Canberra Delegation, future City Deal

Capability building – programs: overcome challenges, take advantage of opportunities, move towards cluster model

Key growth industries

Food, beverage & fibre

- 400 manufacturers of scale
- Connection with agriculture – northern foodbowl
- Agritech and food tech (La Trobe, RMIT)

Health & wellbeing

- Largest workforce, two clusters (Austin, Northern plus emerging La Trobe precinct)

Advanced manufacturing (3,600 businesses – includes ex-auto, caravan industry – automation, link with NDIS)

Digital economy/business and professional services – incubators

Freight & logistics – Melbourne Airport, Melbourne Market

Visitor economy – undersold

Where to from here?

Measures to increase visitation and yield

Industry collaboration across Metropolitan Melbourne

Visitor Economy – Melbourne's North

The Visitor Economy is Greater Melbourne's fourth largest economic driver and one of Victoria's fastest growing sectors with an estimated output of over $23 billion

Of the 162,000 people employed by the Visitor Economy in Victoria over 119,000 jobs can be attributed to the Visitor Economy in Greater Melbourne

Melbourne's North – consistently one largest industry sectors in all municipalities

- Key tourism assets:
  - Australia's second largest airport, Melbourne Airport
  - universities and TAFEs with many overseas students
  - significant open green space
  - a thriving creative arts scene in Inner Melbourne and a heritage arts scene based in the North East, which includes the Heidelberg, Heide and Montsalvat schools of artists along the Yarra River, the Yarrambat precinct, as well as historic heritage architecture and wineries in the North West (e.g. Sunbury)
  - Australia's most significant food manufacturing sector

Visitor Economy - Untapped Potential

The NORTH Link Melbourne's North Regional Investment Attraction Strategy and Prospectus identifies the Visitor Economy as a key growth sector for Melbourne's North, with "enormous untapped potential"

The Investment Strategy - visitors need to be anchored in the region "to encourage higher tourism yield via overnight stays and spending on restaurant, entertainment, transport and tourism items", hence the need for sophisticated promotion and quality accommodation and dining options

The average length of stay for international visitors to Melbourne's North is, by and large, higher than the Victorian average of 18.3 days – the City of Whittlesea is 35.4 days, the City of Darebin is 40.7 days, the City of Moreland is 37.4 days and the Shire of Nillumbik is 29.5 days (VFR)

Significant new tourism investment in the North: e.g. URBNSURF, Marnong Estate (winery, restaurant and accommodation) and new accommodation at Epping (Mantra, Quest), and Bundoora (Parc, Quest). The major attraction Funfields in Whittlesea lured over 200,000 visitors in the last summer season (2018/19).

Diversify economic base after closure of Ford's manufacturing operations

Economic Development - entry-level jobs

Metropolitan Visitor Economy – Constraints

- Lack Regional Tourism Board for Metropolitan Melbourne or its regions
- Regional tourism is seen as country tourism
- However, we see Melbourne's North as a distinct region
- Regional Tourism Review - given that approximately 15 million visitors travel beyond the CBD into Outer Metropolitan Melbourne per annum, we requested in our submission that Greater Melbourne is considered in the review

Destination Melbourne

Key concerns arise as a result of the closure of Destination Melbourne:

- The loss of a peak tourism body focused solely on Greater Melbourne
- The substantial loss of accumulative industry investment in programs
- The uncertain future of the accumulated industry investment and intellectual property associated with key marketing
- Loss of campaign know-how (DYOB)
- The loss of a conduit for local councils; and
- The lack of stakeholder engagement and consultation about this closure.

Opportunity and Solutions

Points of Agreement in North

- *It was agreed that food and beverage was the common "family resemblance" for tourism in the North*
- *It was agreed that the Victorian Government were unlikely to implement a Melbourne's North or even a Melbourne Tourism Board at this stage – however, we will wait for Review outcome*
- *Common set of statistics is vital*

Preferred Solutions

- *1) Melbourne's North Tourism Board*
- *2) Melbourne Tourism Board with dedicated Melbourne's North resources based in North*
- *3) Contributory model like Western Melbourne Tourism (initially funded by Councils)*
- *Industry to contribute if any of models 1), 2) or 3) came to pass*
- *Value proposition to industry should, however, be crystal clear*

Clive Dwyer

Director, Engagement
Committee for Melbourne

Shaping Melbourne's future

Leanne Edwards

Director, Policy
Committee for Melbourne

Shaping Melbourne's future

Clive Dwyer

Director, Engagement
Committee for Melbourne

Shaping Melbourne's future

Round Table Discussion with...

Craig Becconsall, Richard Ponsford & Chris James

Martine Letts

CEO

Committee for Melbourne

Shaping Melbourne's future

Register Now

To our End of Year Cocktail event to celebrate the achievements of our members and to launch of the Ipsos Understanding Australia (Melbourne) 2019 report.

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