

MOORABOOL SHIRE VISITOR ECONOMY STRATEGY

2023- 2027



ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Traditional Owners of the land on which Moorabool Shire sits, the Wadawurrung, Wurundjeri Woi Wurrung and the Dja Dja Wurrung Peoples. On behalf of the municipality, Council pays respect to their Elders, past, present and future.

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EXECUTIVE SUMMARY

Moorabool Shire's Visitor Economy Strategy has been prepared to provide a strategic and unified direction for the development of a strong visitor economy between 2023 and 2027.

Located as the gateway to western regional Victoria, Moorabool Shire is perfectly positioned to grow its visitor economy, leveraging an abundance of nature, quality produce, and quaint towns to fulfill its potential.

Informed by independent research and analysis, consultation with industry representatives, community groups, local businesses, Council and Government stakeholders, the Visitor Economy Strategy will be key to guiding the Shire's visitor economy success.



STRATEGIC CONSIDERATIONS

A number of key considerations for the Moorabool Shire visitor economy have emerged throughout the development of the Visitor Economy Strategy. These have been summarised below.

Awareness, Marketing and Brand Considerations

- Need to build market awareness through branding, digital and physical visitor information and marketing.
- Focus marketing and promotion on key towns with existing market awareness.
- Leverage proximity to and awareness of Ballarat and Daylesford.
- Enhance and develop new products and experiences.
- Increase awareness of products and experiences in the Shire.
- Maintain local character and rural amenity.
- Utilise heritage buildings for tourism enterprise, including food, beverage, retail and visitor accommodation.
- Leverage the Shire's comparative advantage of providing a rural escape in proximity to Melbourne.

Driving Demand

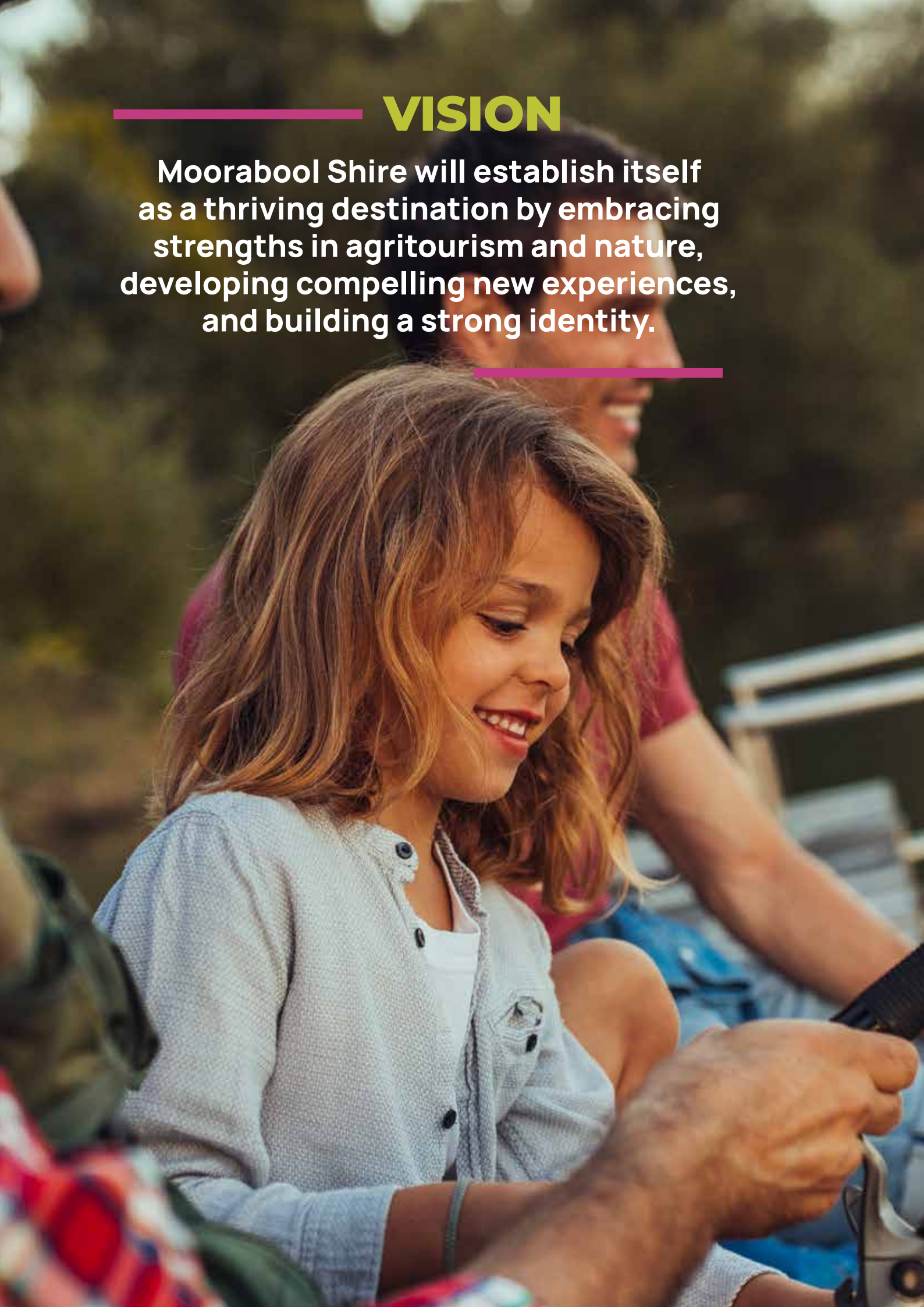
- Develop and promote hero attractions, including nature-based attractions and First Nations experiences.
- Develop new products and experiences aligned to the Shire's product pillars; agritourism, nature, and arts and culture.
- Support development of a strong events and festivals calendar aligned to the Shire's product pillars.
- Develop high quality and contemporary accommodation.

Visitor Economy Foundations and Support

- Council should provide the foundations for a successful visitor economy, including provision of digital and physical visitor information.
- Strengthen and support the tourism industry.
- Become a "Visitor Ready" destination.
- Attract new contemporary food and retail businesses.
- Township activation and amenity development and enhancement.

VISION

Moorabool Shire will establish itself as a thriving destination by embracing strengths in agritourism and nature, developing compelling new experiences, and building a strong identity.



OBJECTIVES

- Establish hero products, experiences and major events to drive visitation and increase market awareness.
- Support investment in contemporary products and supporting infrastructure that position Moorabool Shire as an attractive visitor destination.
- Create critical product mass through focused investment at key visitor nodes.
- Enhance visitor servicing, marketing and promotion to encourage increased visitation, yield and dispersal across the Shire.
- Foster and empower a strong, connected and visitor ready tourism industry.

PERFORMANCE TARGETS

Target 1

180k Overnight Visitors

Increase overnight visitation to Moorabool Shire from 123,000 to 180,000 by 2027.

Target 2

\$120M Spend p.a

Grow visitor expenditure from \$65 million per annum to \$120 million per annum by 2027.

These targets will be reached in part by organic visitation growth, as well as Council delivery of the Visitor Economy Strategy projects and actions to support industry growth.

STRATEGIC THEMES & PRIORITY PROJECTS

Key themes to guide future investment have been identified in response to strategic considerations and objectives for tourism development in Moorabool Shire.

Priority projects have been assessed against current objectives and themes. Projects that best address critical issues or opportunities for Moorabool Shire have been prioritised.



1

2

THEME

Branding, Marketing and Resourcing

Enabling the Visitor Economy

FOCUS

Develop a strong brand identity through marketing, collateral and digital to promote increased awareness of the Shire's offering.

Deliver high quality accommodation and infrastructure to support development of a strong and accessible tourism industry.

PRIORITY PROJECTS

- Digital Marketing and Visitor Servicing Action Plan
- Brand Strategy
- Governance and Resourcing

- Investment Attraction Strategy
- Infrastructure Advocacy and Delivery
- Small Towns Placemaking and Activation Plan



3

Food, Farmgate and Ferments

Leverage the region's high quality agricultural produce to develop a motivational and contemporary agritourism and foodie scene.

- Agribusiness Brand
- Farmgate Experience Development and Enhancement



4

Nature and Outdoors

Activate and celebrate the natural environment through investment in infrastructure, trails and interpretation.

- Natural Attractions Masterplan
- Trails Investment Masterplan



5

Events

Utilise events as a destination awareness driver by building a strong events calendar, events infrastructure and enhancing resourcing and internal processes.

- Signature Events Attraction
- Internal Events Processes and Resourcing
- Events Venue Feasibility Study



6

Arts, Culture and Activation

Improve the visitor experience through a focus on vibrant high amenity townships, art, culture and heritage.

- Bacchus Marsh and Ballan Key Township Activation
- Art Gallery Development
- Avenue of Honour Activation Masterplan
- Heritage and Arts Activation Program

An aerial photograph of a waterfall cascading into a pool. The waterfall flows from the top left towards the center, where it meets a calm pool of water. The surrounding area is lush with green trees and vegetation, interspersed with rocky terrain. The word "INTRODUCTION" is overlaid in large, white, bold, sans-serif capital letters across the middle of the image.

INTRODUCTION

PROJECT OBJECTIVE

Moorabool Shire's Visitor Economy Strategy will provide a strategic and unified direction for the evolution of the visitor economy between 2023 and 2027, with a focus on awareness, product development, and enabling infrastructure. This will be achieved by empowering and supporting the local industry, including measures that support the recovery of the tourism sector (and tourism businesses) from the impacts of the COVID-19 pandemic.



The Project

Moorabool Shire Council (Council) has engaged Urban Enterprise to prepare a Visitor Economy Strategy (VES) to guide the growth of the Shire's visitor economy.

The Strategy takes into account the existing tourism environment and product mix, visitor markets, competitive strengths and weaknesses, and opportunities for investment and visitor attraction. It is informed by independent research and analysis, as well as consultation with industry representatives, community groups, local businesses, Council and Government stakeholders.



The Region

Moorabool Shire is strategically located as the gateway to western regional Victoria, less than an hours drive from Melbourne.

Moorabool Shire encompasses over 2,000 square kilometres of land and is home to approximately 37,000 people. Over half the population live within Bacchus Marsh, the primary servicing town for the region.

With a population of almost six million in Melbourne, the close proximity provides a major comparative advantage for the region in comparison to other visitor destinations.



Best Practice Destination Management

Destination Management Planning is based on the holistic consideration of a region's tourism industry, and its position within the regional economy. Destination Management Plans reflect the attributes of each destination, providing a blueprint for future investment in tourism including new experiences and attractions, and infrastructure requirements (roads, parks, technology) to support visitor growth.

The Visitor Economy Strategy for Moorabool Shire will follow the Guide to Best Practice in Destination Management, as developed by the Australian Regional Tourism Network (ARTN).



Council's Role in the Visitor Economy

Council plays an essential role in the visitor economy of its region. Council acts as an enabler for the visitor economy by providing the foundations, including infrastructure, visitor information services, and support to the local industry.

The role of Council at its essence is to ensure liveability for its residents. By continually investing in the creation of liveable destinations, Council in turn facilitates the creation of a vibrant visitor economy by supporting the private sector to invest in products and experiences.

This role is typically supported by local or regional tourism entities, such as Regional Tourism Boards and Visitor Economy Partnerships, to help develop and support local tourism products and services in building capability and providing them with marketing opportunities to amplify destination awareness¹.

¹Visit Victoria

MOORABOOL SHIRE IN CONTEXT



Visitor Economy Snapshot²

574,000

Visitors

451 K 79%

Daytrip visitors

123 K 21%

Overnight visitors

\$65.3 M

Visitor spend

\$33.4 M 51%

Daytrip spend

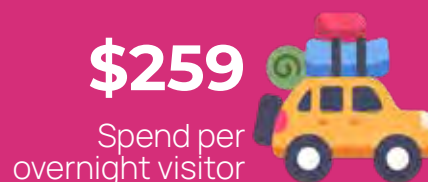
\$31.9 M 49%

Overnight spend



\$74

Spend per
daytrip visitor



\$259

Spend per
overnight visitor

In 2019, prior to the COVID-19 pandemic, Moorabool Shire attracted 574,000 visitors to the region, the majority of which are daytrip visitors. This is influenced by the proximity to Melbourne, the volume of accessible nature-based attractions, and the high proportion of Visiting Friends and Relatives (VFR) visitors.

Visitors to Moorabool Shire are presently low yield, with daytrip visitors spending an average of \$74 per person and overnight visitors spending an average of \$259 per trip. There is opportunity to significantly increase visitor spend through the development of compelling new products, experiences, events and accommodation.

Tourism is an important economic driver for the Shire, employing 423 people (5.4% of total employment) and generating 3.3% (\$78.6 million) of the Shire's output³. There is potential to significantly increase the contribution of the Shire's tourism industry through a strong Visitor Economy Strategy that will guide tourism development.

As a destination in its infancy, the COVID-19 pandemic did not have a great influence on the Moorabool Shire visitor economy, with visitation only marginally impacted (-15%) and expenditure more significantly impacted (-56%) due to closure of visitor spend products such as dining and accommodation. The regions location on the border of metropolitan and regional Melbourne provided the perfect opportunity for daytrip visitors seeking out nature-based attractions.

²Tourism Research Australia (TRA). Visitor numbers, TRA, 2019. Average spend per visitor, TRA LGA Profile, 2019. Total spend, calculated by Urban Enterprise, average spend applied to visitor numbers.

³Remplan, 2020.

INFORMING THE STRATEGY

The Process

The Strategy has been informed by significant research, which has been drawn on as evidence throughout the strategy as required. This includes a market research audience survey of Victorian residents, a business and community survey, and detailed product and experience assessments.

The following process was undertaken to inform the development of the Visitor Economy Strategy.

Research, Discovery & Assessment

- Review of 20+ documents
- Research into target markets (TRA)
- Site visits to key towns and attractions
- Product audits inventorying top attractions, supporting products, events and infrastructure
- Market Research Survey of Victorian residents

Engagement

- Industry and community workshops conducted by sub-region (x7)
- Community and Business Survey
- Council workshops (x2)
- Consultation with state government agencies and private operators

Issues & Opportunities

- Identification of issues and opportunities based on assessment, engagement, site visits and product audits.

Strategy

- Development of strategic framework, including vision, objectives and identification of priority projects.



Strategic Policy Context

Alignment to existing strategic policy and direction is critical to the success of the Moorabool Shire Visitor Economy Strategy.

Key documents reviewed include local, regional and State Government plans and policies. These are listed in Appendix A and have been drawn on throughout the report as relevant.

The Visitor Economy Recovery and Reform Plan 2020, the Regional Tourism Review, Victorian Visitor Economy Strategy Action Plan and the Victorian Traditional Owner

Cultural Landscapes Strategy are the key strategies guiding development of the Victorian visitor economy.

These documents provide a range of findings and strategic direction relevant to development of the Moorabool Shire visitor economy. These are summarised in the adjacent figure.

The Victorian Visitor Economy Strategy Action Plan is the key State Government strategy, which outlines nine priorities, each with their own actions, in order to achieve the Victorian Government's goal of

increasing visitor spending to \$36.5 billion by 2024-25.

The nine priorities include:

- More private sector investment.
- Build on the potential of rural and regional Victoria.
- Improved branding and marketing.
- Maximise the benefits of events.
- Improved experiences for visitors from Asia.
- Better tourism infrastructure.
- Improved access into and around Victoria.
- A skilled and capable sector.
- More effective coordination.

Developing new products and experiences

Increasing private sector investment

Increasing visitor dispersal to smaller townships

Establishing a partnership with surrounding LGAs

Improving brand and marketing of destinations

Establishing digital visitor information services and improving collateral

Developing a strong relationship between Council, industry and community

Supporting and strengthening the tourism industry

Capacity building and support to grow and enhance existing business offerings



Local Development Context

A number of relevant State infrastructure projects are underway or proposed, which may impact the visitor economy in Moorabool Shire. These include:

- West Gate Tunnel Project
- Western Victoria Transmission Network Project (proposed)
- Planning for Melbourne's Green Wedges and Agricultural Land (underway)

MOORABOOL SHIRE PLANNED PROJECTS

Bald Hill Activation Plan

This project provides a framework for investment in Bald Hill, a reserve located just north of Bacchus Marsh.

There are a range of opportunities identified for the precinct, including mountain bike trails, all abilities walking trails, events and conferences spaces and food and beverage facilities. These developments will support the attraction of a range of visitor markets, including those of different ages and abilities.

Stage one of the project has been completed with \$750,000 funding from Regional Development Victoria, and includes the establishment of the 1000+ Steps walking trail, spanning 1.5 kilometres to the peak of Bald Hill.

Moorabool Aquatic and Recreation Centre

This is an Integrated indoor sports and aquatic Facility, which includes the design of indoor sports courts, an aquatic centre including gymnasium, consulting rooms and multi-purpose spaces.

The project is being staged with the indoor stadium currently under construction and further funding advocacy is in progress for the aquatic facility as stage 2.

This facility will help drive visitation to the area and grow the visitor economy through the attraction and delivery of regional sporting events.

Aqualink Cycling and Walking Corridor

The Aqualink Cycling and Walking Corridor will connect the Lerderberg River with the Werribee River for residents and visitors via a 4.5 kilometre off-road cycling and walking path network.

The network of paths will be developed to provide better access to the town's main attractions and services. It will see linkages by non-car transport between Bacchus Marsh, Darley and Bacchus Marsh Train Station.

Bacchus Marsh Racecourse and Recreation Reserve

The development of the Bacchus Marsh Racecourse and Recreation Reserve will see the establishment of an active sports precinct. This project will be developed in three stages.

Stage one of the project is complete, including a new BMX Track, multipurpose oval, equestrian cross-country course, dressage arenas, sports pavilion, cricket practice nets, playground, as well as civil works and sight services.

BALD HILL CONCEPT PLAN



OTHER PROJECTS

- Darley Park Community and Sports Centre
- Parwan Employment Precinct
- Ballan Library, Arts and Tourism Hub
- Western Irrigation Network

Forces at Play

There are a range of macro-economic trends impacting the visitor economy, as well as regional and local trends. These have been summarised below as they relate to Moorabool Shire.

The COVID-19 Pandemic

Travel restrictions due to the COVID-19 pandemic caused a 67% decline in domestic overnight trips between June 2019 / 2020. The visitor economy had yet to recover as of June 2021, with domestic overnight trips still 19% lower than June 2019⁴. The return of travel has been concentrated in the Holiday and VFR segments, in particular from short haul source markets, with a lower level of business travel.

Consumer's inability and hesitancy to travel internationally has led to a younger and more diverse domestic visitor market, who have time to travel longer distances and who seek exciting and contemporary tourism products and experiences⁵.

The rise in remote working also provides visitors with more flexibility to travel for more nights and not be constrained by annual leave or public holidays. The ability of destinations to capture these markets will depend on the availability of high speed internet and accommodation with appropriate business facilities.

Shift towards nature-based visitation

Nature-based tourism has long been a motivating driver for visitors to explore Victoria. Growth trends in experiencing nature have outgrown every other activity consumption in Victoria in the past ten years and since COVID-19 restrictions this has been exacerbated and people's desire to be amongst nature has increased substantially.

The Victorian Government has recently invested heavily in nature-based tourism, particularly in tracks and trails to support walking and cycle tourism. Moorabool is well placed to leverage the growing consumption of nature-based tourism through strengthening some of its icons such as Werribee Gorge State Park, Lerderberg State Park, Wombat State Forest, and Lal Lal Falls.

Culturally and linguistically diverse market exploration of regional Victoria

The culturally and linguistically diverse (CALD) market is a key growing segment for tourism in Australia. 30% of Victorians are born overseas and there has been a substantial increase in Asian and sub-continental origin residents particularly in Melbourne over the past two decades.

Whilst these groups are diverse in ethnicity and language, many of these have commonalities in their desire to explore Victoria and have passive nature-based experiences. It is important that Victorian destinations understand the needs of this market and support growth in this market segment.

Whilst the CALD market is largely a lower yielding segment, over time this is likely to change and the connections made during exploration of Victoria will lead to future long term repeat visitors.

Growth in Airbnb

Growth in the use of self-contained accommodation, such as Airbnb and Stayz, has outpaced investment in new hotels and motels. In 2017, the number of nights stayed in Airbnb and Stayz in Australia grew 9.6% whilst conventional hotels grew only 5.6%⁶.

Airbnb accommodation provides privacy for guests, who often do not interact with the accommodation operator during their stay. Airbnb is highly suited to families, offering entire homes with kitchen and laundry facilities, allowing visitors to be self-sufficient during their stay. Additionally, compared to other accommodation types, Airbnb accommodation has come to be viewed as a COVID-19 safe alternative.

⁴Tourism and Hotel Market Outlook 2021 – Edition 2, Deloitte Access Economics.

⁵Beyond COVID-19: Rise of Domestic Travel and Tourism in Australia, KPMG, 2021.

⁶Tourism and Hotel Market Outlook, 2018, Deloitte Access Economics.

Rise in remote-working and growth in tree-change

COVID-19 restrictions have increased the opportunity for workers to have flexibility and 'working' holidays. This is significant as it increases the potential for mid-week travel to Moorabool Shire. High quality internet and provision of WIFI in accommodation is critical for supporting this opportunity.

Additionally, COVID-19 has led to an increase in residents relocating outside of major cities. Tree change brings new residents and ideas to destinations and whilst it may have a negative effect in terms of increasing property values, it is positive in terms of supporting population growth in locations that may be suffering decline and delivering a new workforce and business owners to regions.

Caravan, camping and nature based

Given the shift towards more local, frequent and affordable domestic holidays, caravan and camping travel has become attractive to a more diverse group of visitors, beyond the traditional grey nomad road tripper market segment. As a result, the number of recreational vehicles rose by 16.5% in June 2020, with Australian caravan production reaching a 30 year high in 2021⁷.

Nature-based accommodation has also become increasingly popular. This accommodation type is a more 'COVID-safe' option and represents an alternative to traditional accommodation for those seeking a more unique experience.

Growth in the Experience Economy

The Experience Economy is the sale of memorable experiences to customers. Key target markets in Australia such as Lifestyle Leaders have a much greater focus on the experience of destination and are willing to spend on experience over product.

Increased consumption of experiences presents an opportunity for Moorabool Shire to add substantial yield from visitors. The tourism industry needs to understand the importance of visitor experience consumption and the impact this has on motivating higher yield visitors to a region and providing a positive and satisfying experience.

⁷Caravan Industry Association Australia, 2021.

Local Insights

The development of the Strategy was underpinned by robust stakeholder engagement, which facilitated an in-depth understanding of the unique local conditions, challenges and opportunities.

Engagement with over 300 local residents, community and Council personnel, across the engagement sessions displayed adjacent. This has ensured the Visitor Economy Strategy is grounded in local aspirations, responds to local needs, and is supported by local stakeholders.

The engagements were undertaken virtually via videoconferencing, across November and December 2021, due to COVID-19 restrictions.



Key Outcomes Desired from the Visitor Economy Strategy⁴

The business and community survey sought to understand local aspirations for the visitor economy and key outcomes desired from the delivery of this Strategy.

This highlighted the strongest desire for increased marketing and promotion, delivery of new events and festivals, improved visitor amenities, and town beautification. In addition, this highlighted the local desire for Council support to guide the development of the Shire's towns as destinations.



⁴Moorabool Shire Business and Community Survey, 2021.

MAKING A SUCCESSFUL VISITOR DESTINATION

The Moorabool Shire Visitor Economy Strategy has been prepared with best practice destination management planning. The following discussion concerns the attributes of successful destination management and how this relates to Moorabool Shire.



THE KEY

Successful destination management is a holistic process that ensures tourism adds value to the economy, social fabric and ecology of our communities. It is achieved through strong leadership with consideration of place, people and product.



PLACE

Defining the destination in the eyes of the visitor and communities of interest and understanding the visitor journey to and within the region.



PEOPLE

Cohesive governance and strong leadership, engaged industry and qualified and experienced labour force.



PRODUCT

Motivating products, quality infrastructure and experiences on offer that draw visitors and provide to visitor needs.



PLACE A WELL DEFINED REGION

A major focus of this project is defining the region of Moorabool Shire and the experiences that it has to offer. **Tourism destinations that are well defined and lead with their most well-known destinations are those that resonate best with the visitor.**

Market research undertaken for Moorabool Shire highlights that there is low awareness of the key townships within the Shire, especially when compared to surrounding and comparable visitor destinations. **Ballan and Bacchus Marsh are the only towns with considerable awareness in the Victorian Market.**

When prompted, only 36% of the Victorian market have heard of Moorabool Shire. This reinforces the need to lead local marketing activities with Bacchus Marsh and Ballan.

The large proportion of respondents who have heard of destinations in Moorabool Shire but do not want to visit (e.g. 47% Bacchus Marsh) indicates poor awareness of the destinations, as well as lack of motivating products and experiences within the region.

AWARENESS OF MOORABOOL SHIRE COMPARED TO SURROUNDING AND COMPETING DESTINATIONS⁵

	I have never heard of this place	I have heard the name and have interest in visiting	I have heard the name but do not want to visit
Bacchus Marsh	11%	47%	42%
Ballan	24%	33%	43%
Ballarat	3%	84%	13%
Blackwood	52%	21%	26%
Buninyong	45%	26%	29%
Daylesford	9%	77%	14%
Dandenong Ranges	5%	77%	18%
Dunnstown	69%	13%	17%
Gordon	60%	16%	24%
Greendale	59%	19%	21%
Healesville	14%	72%	14%
Lal Lal	66%	14%	19%
Meredith	57%	22%	21%
Mount Macedon	19%	61%	20%
Myrning	58%	19%	23%
Trentham	46%	30%	23%
Wallace	64%	14%	23%
Yarra Valley	4%	83%	14%
Yarra Glen	10%	70%	20%

⁵Moorabool Shire Market Research, Urban Enterprise, 2022.



PEOPLE COHESIVE GOVERNANCE AND STRONG LEADERSHIP

At present, there is a fragmented approach to tourism marketing and product development in Moorabool Shire. This results from a lack of Council-led strategic tourism direction in recent years, and a lack of formal involvement in regional tourism structures.

This impacts the ability of the existing local tourism industry to grow and flourish, as well as the ability of the region to attract new investors.

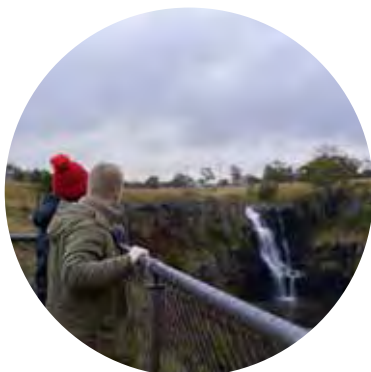
A clear tourism structure, with regional and local roles and responsibilities, is required for development of a cohesive and strong visitor economy. This includes clear roles for product development, industry engagement and support, tourism marketing and visitor servicing.





PRODUCT MOTIVATING PRODUCT, EXPERIENCES AND QUALITY INFRASTRUCTURE

ASSET



PRODUCT



EXPERIENCE



The destination development framework has been presented above.

Product is the key element a destination is built around. This provides the reason that draws visitors to a destination and drives the visitor economy. The framework involves developing base assets into products, and enhancing products to become experiences.

At present, tourism in Moorabool Shire is in its infancy. The Shire currently has the base assets which provide the supporting infrastructure, but requires the products that will help to activate the assets. This project will focus on building products and experiences.

Motivating Product

Nature and agritourism are the primary experiences currently motivating visitors to the region. Continued improvement of the existing product offer, and investment in new high quality products and experiences such as arts, dining, and cycling, is needed to grow the visitor economy.

Quality accommodation is an essential requirement for growing visitor yield and essential to establishing and growing a regional destination. Accommodation is a key aspect of the decision-making process for the Victorian market, with 40% not willing to stay in a destination if the accommodation options do not meet their needs and preferences⁶.

Quality Infrastructure

Infrastructure within destination management are the assets often delivered and funded by Government. This includes roads, township streetscapes, parks, nature-based assets, trails, telecommunications, water assets, and services such as sewer and power. These are the elements that support private sector investment and also provide the backbone to carrying capacity within a destination.

The Moorabool Shire Visitor Economy Strategy focuses on delivering the quality infrastructure that is needed to support industry investment across the region, as well as an improved visitor experience.

⁶Moorabool Shire Market Research, Urban Enterprise, 2022.

Responding to the Visitor Journey

Understanding the contemporary visitor journey and how this impacts on product and experience development and marketing is critical to success for Moorabool Shire.

Below are the steps that form the visitor journey.

	What is important?	How information is received/shared?	What does this mean for Moorabool Shire?
1. Dreaming: Seed is Planted 	<ul style="list-style-type: none"> • Captivating Imagery • Advertising and marketing 	<ul style="list-style-type: none"> • Travel blogs • Ads – TV, Radio Facebook, Instagram • Friends/relatives 	<p>Visitors are motivated to visit a destination when the seed is planted through marketing, inspiring imagery or word of mouth. Research indicates that 1 in 3 leisure travellers do not have a specific destination in mind when they first think about going on a trip⁷. This provides an opportunity to inspire visitors to Moorabool Shire.</p>
2. Planning: Pre-booking Research 	<ul style="list-style-type: none"> • Search Engine Optimisation (SEO) • Optimise listings on Google Maps 	<ul style="list-style-type: none"> • Travel blogs for information • Destination websites • Friends/relatives 	<p>The majority of research in the pre-booking phase occurs through online media and information, requiring high quality, engaging, informative and easy to navigate websites. Moorabool Shire requires a clear and cohesive online presence to translate interest to visitation.</p>
3. Booking: Call to Action 	<ul style="list-style-type: none"> • Easy to navigate website • Links to booking sites • SEO 	<ul style="list-style-type: none"> • Booking sites • Accommodation (e.g. Airbnb, Booking.com, Stayz) • Experiences (e.g. Red Balloon) 	<p>If the visitor is satisfied with their pre-booking research, they are called to action to book. The conversion to a booking requires enough information available remotely to influence the visitor's desire to book.</p>
4. Experiencing: During Visit 	<ul style="list-style-type: none"> • Products and experiences to meet visitor needs • Accommodation • Visitor infrastructure and amenity • In-region visitor information 	<ul style="list-style-type: none"> • Google Maps • Visitor Guides • Regional Maps • Businesses • Locals • Brochures • Social Media • VICs 	<p>It is critical that the region delivers a first class experience aligned to contemporary visitor expectations, including nature-based experiences, accommodation, contemporary dining with a high level of service, and modern and well-maintained visitor infrastructure and amenity. This will ensure visitors are satisfied with their experience and encourages positive word of mouth marketing and repeat visitation.</p> <p>In this stage, it is also important to have information that supports the visitors understanding of the region, by reinforcing products and experiences through signage, gateway treatments to demarcate the region, and visitor guides and maps.</p>
5. Sharing: During/Post Visit 	<ul style="list-style-type: none"> • Telecomms for visitors to share photos/ experiences 	<ul style="list-style-type: none"> • Social media – Facebook and Instagram • Word of Mouth to friends and relatives • Travel blogs 	<p>Sharing of experiences occurs through social media and online reviews and recommendations. Visitors are more likely to share photos online if the experiences and infrastructure are impressive.</p>

⁷Visit Victoria Servicing Intercept Research, 2019.

VISITOR ECONOMY



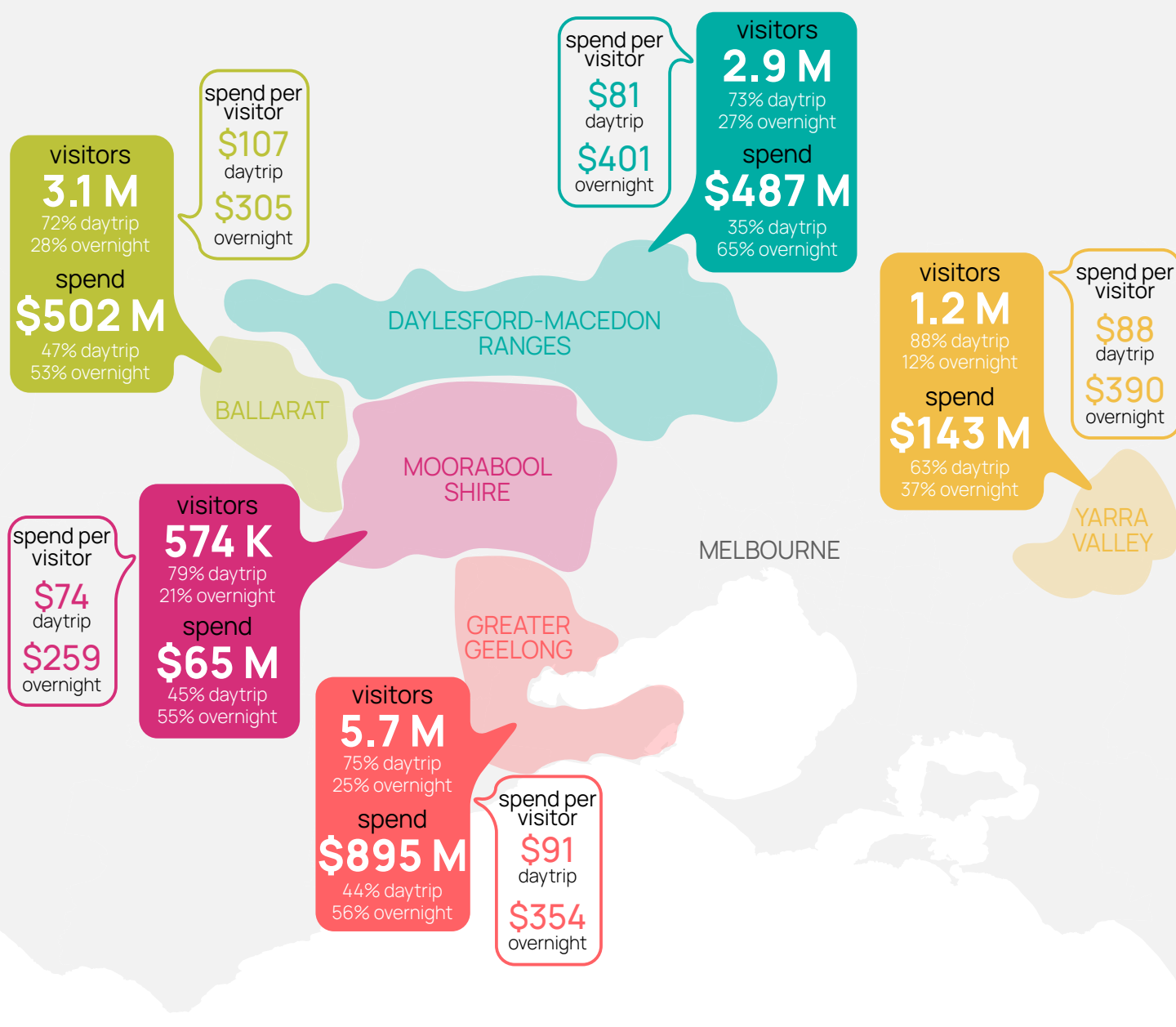
Moorabool Shire Visitor Economy

Moorabool Shire saw 574,000 visitors in 2019, driven predominately by daytrip visitation (79%). These visitors spent a total of \$65.3 million, with a majority of this expenditure generated by daytrip visitors (51%)⁸.

Visitor expenditure in Moorabool Shire is significantly lower than surrounding destinations such as Ballarat and Daylesford-Macedon Ranges, as depicted in the map below. This is in large due to a lack of motivating products and experiences to drive spend and overnight stays, as well as lack of consumer awareness of Moorabool Shire and its key destinations.

In addition, when compared to destinations a similar distance from Melbourne, such as Yarra Valley, Moorabool Shire has a considerably smaller domestic visitor economy.

Due to its peri-urban location and proximity to major population centres, including Melbourne and Ballarat, Moorabool Shire has the potential to grow its visitor economy substantially.



⁸Tourism Research Australia (TRA). Visitor numbers, TRA, 2019. Average spend per visitor, TRA LGA Profile, 2019. Total spend, calculated by Urban Enterprise, average spend applied to visitor numbers. Note: Daylesford-Macedon Ranges includes the LGAs of Hepburn Shire and Macedon Ranges. Visitor numbers for the Yarra Valley are by SA2 and visitor spend is calculated using the spend per visitor to the Yarra Ranges LGA.

Visitor Profile

The analysis below relates to the adjacent Tourism Research Australia data, which provides a profile of existing visitation to Moorabool Shire using a 5 year average of visitation between 2015-19.

Visitor Origin

Moorabool Shire is primarily an intrastate destination, with Victorians making up the majority of domestic daytrip (100%) and overnight (80%) visitors. Within Victoria, the majority of daytrip (74%) and overnight (62%) visitors are from Metropolitan Melbourne, indicating there is major market potential from within this market of nearly 6 million people.

A large proportion of daytrip visitors are attracted from the local government areas surrounding Moorabool Shire, including Wyndham (10%), Ballarat (6%) and Greater Geelong (5%).

Demographic Profile (Lifecycle Group and Age)

Parents with children 14 years or younger (24%), older couples (23%) and young to midlife couples (23%) are the largest market segments visiting Moorabool Shire.

The young age profile of visitors to Moorabool Shire is likely due to the abundance of accessible nature-based attractions available throughout the region. As the age groups most likely to travel and spend, attracting investment in motivating accommodation and complementary dining experiences will be key to targeting a younger demographic.

Seasonality of Visitation

Visitation is highly seasonal, peaking during March and May, which is likely driven by visiting friends and relatives across peak school holiday periods, as well as the fruit picking seasons.

Purpose of Visit

Domestic visitors to the Shire are visiting for holiday and leisure purposes predominately (45%), which is driven in large by day trip visitors visiting natural assets, as reflected in the activity profile. There is significant opportunity to grow the overnight holiday leisure market, which currently only accounts for 39% of overnight visitors, in line with destinations such as Daylesford-Macedon Ranges (54%) and Yarra Valley (54%).

A high proportion of visiting friends and relatives (36%) can result in low visitor expenditure on accommodation, but provides an opportunity to engage locals in the visitor economy as ambassadors and local guides.

Activities

The significance of the VFR market in Moorabool Shire highlights the lack of attractive products and experiences available to visitors, as well as explaining the low visitor spend within the region.

Dining at restaurants and cafes is almost 20% lower in Moorabool Shire compared to other destinations, demonstrating the lack of enticing dining experiences available within Moorabool Shire.

High levels of engagement in low yielding activities, such as visit friends and relatives (37%), bushwalking (19%), sightseeing (14%), visiting national parks (14%) and picnics or BBQs (7%), demonstrates the Shire's strength in nature-based attractions, but also the need to expand the commercial offering.

Visitor Spend

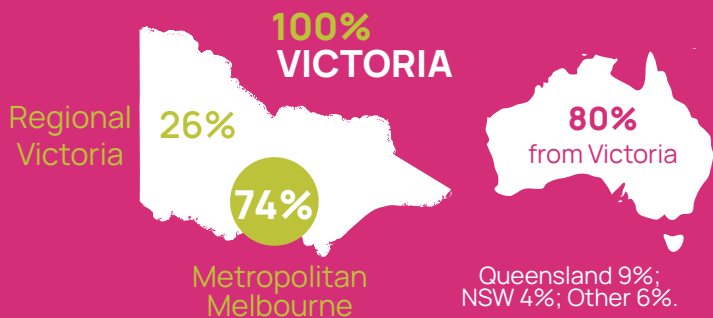
Expenditure patterns of visitors can be attributed to a lack of compelling paid products and experiences that would drive spend in the region, as well as the lack of accommodation that would drive yield and length of stay. Spend on petrol (33%) accounts for the highest proportion of visitor spend.

Considering the small amount of retail in the Shire, visitor spend on shopping is high (13%), as it includes farm-gate sales and purchase of other local produce, including purchase of produce at markets.

Visitor Origin

Daytrip Visitor Origin

Overnight Visitor Origin



Purpose of Visit



45%

Holiday and leisure



36%

Visiting family and friends



10%

Business

Other reasons 8%.

Lifecycle Group



24%

Parent with children under 14 years



23%

Older couple

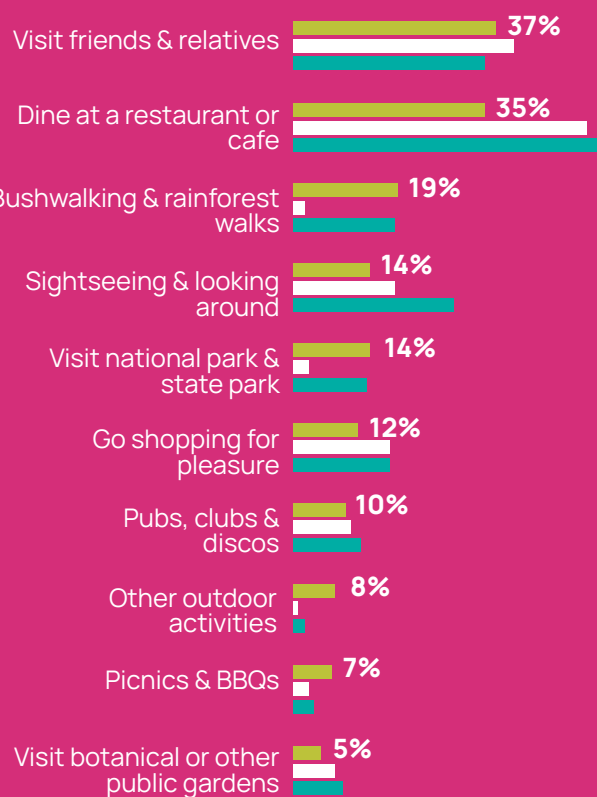


23%

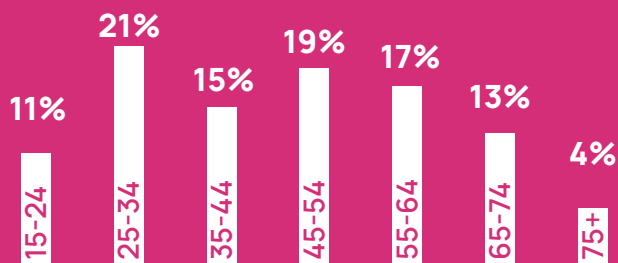
Young to midlife couple (no children)

Older single 13%; Parent with children over 15 years 10%; Young to midlife single 6%.

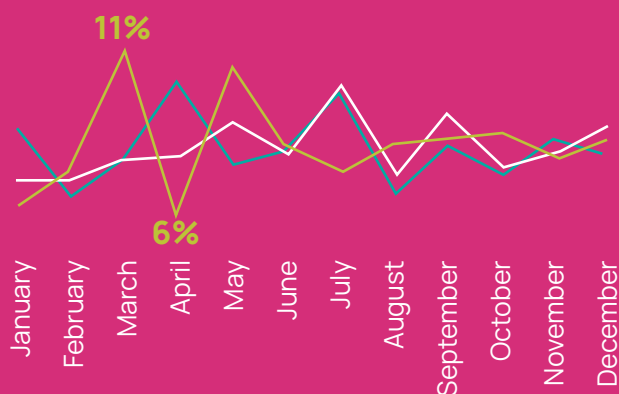
Activity Profile



Age



Seasonality



Spend Profile



33%

Petrol



22%

Dining out



13%

Shopping

Accommodation 11%; Groceries for self-catering 9%; Alcohol, drinks (not already included) 7%; Entertainment 4%; Rental vehicles 2%.



Overnight Visitor Profile

Moorabool Shire has relatively low levels of overnight visitors staying in paid accommodation, due in part to the large proportion of the market staying at a friends or relatives property (53%). This is, however, also due to a limited supply of commercial visitor accommodation (in particular hotels, motels and service apartments), lack of motivating products and experiences, and low awareness of the Shires towns as visitor destination.

Due to the high proportion of overnight visitors staying at a friend or relatives property, expenditure on accommodation is significantly less in Moorabool Shire than in comparable destinations, with an average spend of \$73 compared to destinations such as Ballarat (\$130) and Daylesford-Macedon Ranges (\$171).

On average, overnight visitors to Moorabool Shire spend 2.1 nights in the region. There is opportunity to grow length of stay by focusing on spend.

Majority of visitors to the Shire are travelling with friends or relatives (30%) or alone (27%). At present, the region does not attract the family market for overnight travel, with only a small proportion of visitors travelling with a family group (14%).

	Moorabool Shire	Average of Benchmarked Destinations ⁹	Balance
Commercial Accommodation			▼ -25%
Hotel/resort/motel or motor inn	5%	26%	▼ -21%
Rented house/apartment/flat/unit	4%	12%	▼ -7%
Caravan park or commercial camping ground	11%	5%	▲ +6%
Other commercial	4%	7%	▼ -3%
Non-Commercial Accommodation			▲ +24%
Friends or relatives property	53%	40%	▲ +13%
Own property	4%	4%	-
Caravan or camping – non commercial	15%	3%	▲ +12%
Other Private Accommodation	2%	3%	▼ -1%

Travel Party Type



30%
Friends or relatives



27%
Solo traveller

Adult couple 24%; Family group 14%; Other 3%; Business group 2%.

2.1 Nights
Average length of stay in Moorabool Shire

Average Accommodation Spend per night



⁹Benchmarked destinations that comprise the "Average of Benchmarked Destinations" includes the LGAs of Ballarat, Macedon Ranges and Hepburn Shire.

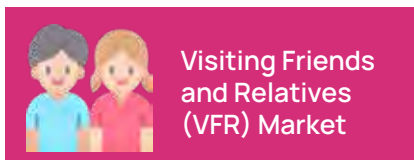




Target Markets

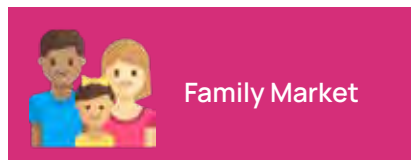
The following have been identified as the target markets for Moorabool Shire. Whilst some are existing markets, emerging markets have also been identified in terms of their potential to drive visitation and yield.

Existing and Emerging Markets



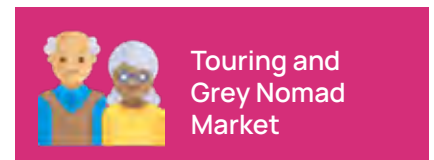
Moorabool Shire is projected to experience a rapid population increase. This rapid increase in population will drive the growth of the VFR market to the region.

Marketing targeted towards residents will educate them on local products and experiences, increase their awareness and create local ambassadors for Moorabool Shire.



14% of overnight visitors are family groups. The low proportion of the family market visiting the region may be due to a lack of suitable accommodation available for families with children.

Investment in family-friendly activities and suitable accommodation, such as high quality tourist parks, is needed to attract this market.



With an abundance of natural assets, Moorabool Shire is well placed to expand the touring offering and attract semi-retired and retired travellers and grey nomads.

Moorabool Shire has the potential to service this market well with its close proximity to population centres, Melbourne and Geelong, as well as the abundance of resident-based services available in the region, including medical facilities and supermarkets.

Growth Potential Markets



Accessible Tourism Market

This is a growing tourism market segment that could be serviced by Moorabool Shire, given the breadth of soft nature experiences and the number of highly accessible locations.

Ensuring accommodation, attractions, towns and nature-based assets are accessible and inclusive, through access, signage, and adhering to standards, should be a best practice standard held by Moorabool Shire.



Adult Couple Market

23% of overnight visitors are adult couples. This is considerably lower than comparable destinations, as a result of the currently limited accommodation and product offering.

Moorabool Shire is well placed to be a weekend escape destination for the adult couples market through product and accommodation investment. Specifically, investment in the food and beverage offering, as well as the arts and culture offering, will make Moorabool Shire a desirable destination for an overnight escape.



Meetings, Incentives, Conferences and Events Market

Moorabool Shire is well-placed for growth in the Meetings, Incentives, Conferences and Events (MICE) market due proximity to major population centres, and access by public transport and car.



Sporting Market

A major opportunity for Moorabool Shire is growing the sporting market, particularly for regional sporting competitions and events.



PRODUCTS, EVENTS AND SUPPORTING INFRASTRUCTURE



THE REGION

The primary strength and appeal of Moorabool Shire is the rural landscape and amenity, nature-based assets of the region and local produce and associated agritourism experience.

Whilst Moorabool Shire has a small tourism offering at present, the region has untapped potential that can be realised with investment in motivating products, experiences, and events.

Moorabool Shire has a wealth of nature-based assets including icons such as Werribee Gorge State Park, Lerderberg State Park, Wombat State Forest, and Lal Lal Falls. These natural assets have growing awareness amongst the Victorian market, however have significant potential to grow awareness for the Shire as a destination.

The land is home to the Wadawurrung in the south and west, the Dja Dja Wurrung in the northern range, and the Wurundjeri Woi Wurrung in the east. There is abundant living cultural history across Moorabool Shire that are important to the region's Traditional Owners, including artefact scatters, sacred trees, rock art and men's and women's ceremony places¹⁰. There is opportunity to increase awareness of culturally significant product through tourism investment and activation.

Farms across Moorabool Shire produce high quality seasonal produce, including apples, stone fruit, cherries and berries. Moorabool Shire has potential to promote itself as the food bowl of the region, particularly through further marketing and promotion of farmgate experiences. 33% of past visitors to Moorabool Shire were highly motivated to visit due to the fresh produce and agricultural experiences available in the region¹¹.

Cycling is an emerging strength for Moorabool Shire, with recent growth in gravel cycling, road cycling, slated investment in mountain biking at Bald Hill and a number of cycling events. In particular, the proximity to Melbourne allows cyclists to travel by train to Ballan or Bacchus Marsh, and provides access to a range of high quality cycle loops.

Cycling visitation has seen significant annual growth of 9% across both Victoria and Australia respectively. Whilst a small market, they are highly engaged and active, and are a high yielding market. Cyclists spend on average \$639 for an overnight trip in Victoria.

Arts, culture and heritage is an emerging strength for Moorabool Shire, with a growing culture of local makers and artisans. Moorabool has a strong farming history, Victorian Gold Rush history embedded in the fabric of its villages, as well as First Nations living culture.

These experiences, however, are yet to be activated as tourism experiences. Developing a vibrant arts and culture scene will be critical to developing a rich and diverse visitor experience, aligns well to the regional product experience, and will encourage additional visitor spend and length of stay.

¹⁰Wadawurrung Country Plan 2020-2030

¹¹Moorabool Shire Market Research Survey, conducted by Urban Enterprise, 2021.

Existing Product Profile¹²

EXISTING PRODUCT STRENGTHS

NATURE & FIRST PEOPLES



AGRITOURISM & FOOD



EMERGING PRODUCT STRENGTHS

ARTS, CULTURE & HERITAGE



TOURISM EVENTS



CYCLING



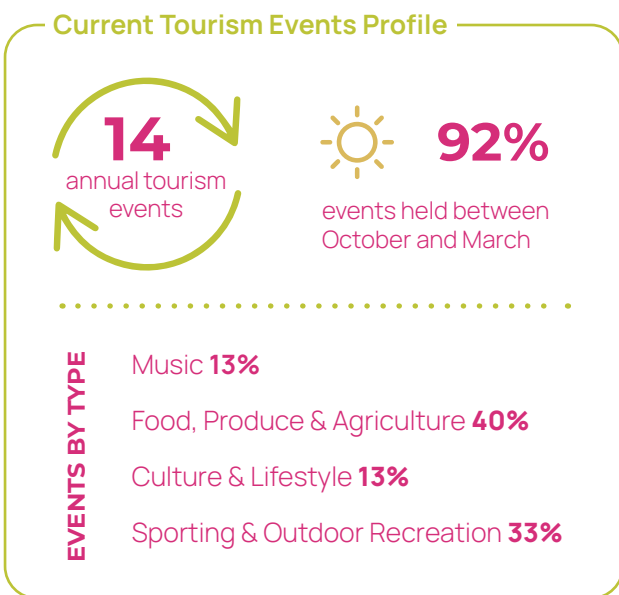
¹²The product and experience assessment is a strategic review of the regions current experience offering. The review included existing inventories and desktop research of products, events and experiences, physical visitor information, site visits and consultation findings.

Events Assessment

This section draws on an audit of events in Moorabool Shire, which identified 14 currently operating tourism events, and a further 45 community events.

A tourism event, as guided by Visit Victoria's event funding guidelines, is an event where a large proportion of the attendees are specifically travelling more than 50 km to the event. The event is the 'main' driver of visitation to the region. For Moorabool Shire, a tourism event is defined as one which attracts visitors from outside the shire. By contrast, community events draw primarily on local population, regional catchment and visitors already in the region.

Tourism Events



Moorabool Shire has a small annual tourism events calendar of 14 annual events, with key events including Bacchus Marsh Harvest Festival, Strawberries and Cherries Festival and the Ballan Autumn Festival.

The events calendar is highly skewed to the warmer months, which is aligned to the large proportion of events in the food, produce and agriculture category, as well as sporting and outdoor recreation.

Development of a strong events calendar, aligned to market demand, will be a major driver of visitor economy growth. In particular, events have the opportunity to increase market awareness of destinations and generate demand for future visitation.

Business Events

Currently, Moorabool Shire does not attract any business events of scale. The region attracts some smaller-scale team building business visitation, serviced by the group accommodation available in the Shire.

There is a major opportunity for Moorabool Shire to capitalise on its close proximity to major population centres and attract conferences, large-scale meetings and exhibitions to the region. This requires investment in appropriate conference and events facilities in strategic locations, such as Bacchus Marsh.



Visitor Market Demand for Events¹³

There is opportunity for Moorabool Shire to develop and grow its events calendar through investment in signature events and festivals. Events are a major driver of visitation, and would motivate 48% of the Victorian market to visit a new destination.

A small proportion of respondents are interested in attending new event however are hesitant if they don't know much about the region (23%). This highlights the need for high quality visitor information and marketing.

Events and festivals involving food, fresh produce and wine would greatly motivate the Victorian market to visit a destination in Moorabool Shire.

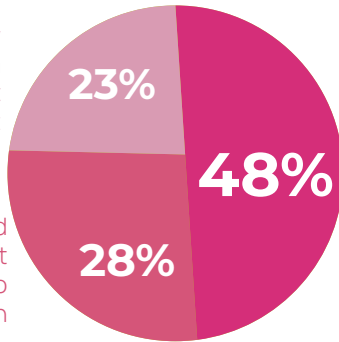
Specifically, markets (including farmers markets) (60%), food and wine events (44%) and "pick your own" produce events would greatly motivate visitors to Moorabool Shire. These event types are strongly aligned to Moorabool Shire's product strengths and opportunities.

Victorian Market Demand for Events

IMPORTANCE OF EVENTS TO MOTIVATING TRAVEL TO A NEW DESTINATION

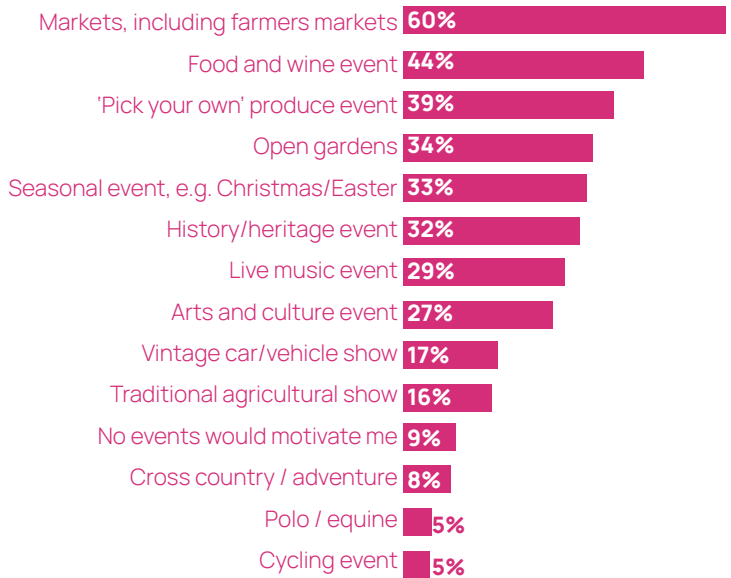
I am interested in attending new events but am hesitant if I don't know much about the area

Events and festivals do not motivate me to visit a region



I will visit a new destination if they have an interesting / exciting event or festival

EVENTS / FESTIVALS THAT WOULD MOTIVATE VISITATION



¹³Market Research of Victorian Visitor Market for Moorabool Shire, Urban Enterprise, 2021.





SUPPORTING INFRASTRUCTURE

Supporting infrastructure, including accommodation, transport and access, and towns and amenities, are crucial to the overall visitor experience. However, existing supporting infrastructure does not meet the current visitor market's expectations or standards.

Moorabool Shire's towns provide a rich rural, nature-based experience, however, lack quality and contemporary products, experiences, amenities and infrastructure to support visitor economy growth.

Town, Infrastructure and Amenity

Bacchus Marsh is the primary urban area of the Moorabool Shire, providing a hub for businesses, retail and visitor services. The main street is currently dominated by professional services, and lacks the motivating dining and retail establishments typically provided by a visitor destination.

There is opportunity to diversify and improve the quality of dining and retail offered in Bacchus Marsh. This will be a key factor in enhancing the township's ability to attract visitors.

Moorabool Shire lacks a key tourist destination. The rich history of the Shire provides the opportunity to identify and promote key townships and promote their unique qualities. Developing key townships within the Shire will encourage visitor dispersal and will help to develop the overall identity of the region.

Transport and Access

Moorabool Shire is well-positioned for growth in the Victorian market due to the region's close proximity to Melbourne and other population centres, including Geelong and Ballarat, and its strategic location of the Western Freeway.

Moorabool Shire is well-connected to Melbourne and Ballarat via rail, as well as via road through the Western Highway. Rail connectivity is good from Bacchus Marsh and Ballan to Melbourne and Ballarat, however there is a lack of regular public transport services to other locations across the Shire and regionally. The Shire lacks walking and cycling paths in many locations, which will be addressed through Council's Open Space Strategy which is currently underway.

The roads in Moorabool Shire require significant upgrades, as many are single-lane with no shoulder, in poor and unsafe conditions, or are unsealed roads.



Accommodation

Moorabool Shire has a small accommodation offering of 128 establishments and 428 rooms. The following table provides a summary of the accommodation available in Moorabool Shire.

The largest supply of rooms is provided in self-contained apartments, units and houses (47%), followed by commercial caravan parks and group accommodation (18% respectively).

Group accommodation contributes to a large proportion of total rooms and bed spaces, reflecting group camp operators hosting large groups for school camps, outdoor education and other group occasions.

The Shire lacks a supply of commercial accommodation, in particular hotels, motels and resorts, which account for only 7% of the Shire's total accommodation stock.

Whilst there are a small number of more upmarket Airbnb properties, the majority of the Shire's accommodation stock is outdated and does not meet the expectations of the contemporary visitor market.

Non-commercial campgrounds are limited in the region, with investment needed to elevate the facilities and amenities available at these sites, including toilets, rubbish collection and picnic areas.

ACCOMMODATION SUMMARY¹⁴

	Establishments		Rooms		Bed Spaces	
	No.	%	No.	%	No.	%
Total	128		428		1,521	
Self-contained unit/ apartment/house	83	65%	201	47%	469	31%
Cottage/bed and breakfast	14	11%	23	5%	54	4%
Caravan park/ commercial camping ground	10	8%	75	18%	341	22%
Farm Stay	8	6%	17	4%	46	3%
Standard hotel/ motel/motor inn/ resort	5	4%	31	7%	89	6%
Free Camping	3	2%	0	0%	0	0%
Group accommodation	3	2%	75	18%	510	34%
Other	2	2%	6	1%	12	1%

¹⁴Accommodation Audit, Urban Enterprise based on desktop research, 2021.

Accommodation Preferences of Victorian Market

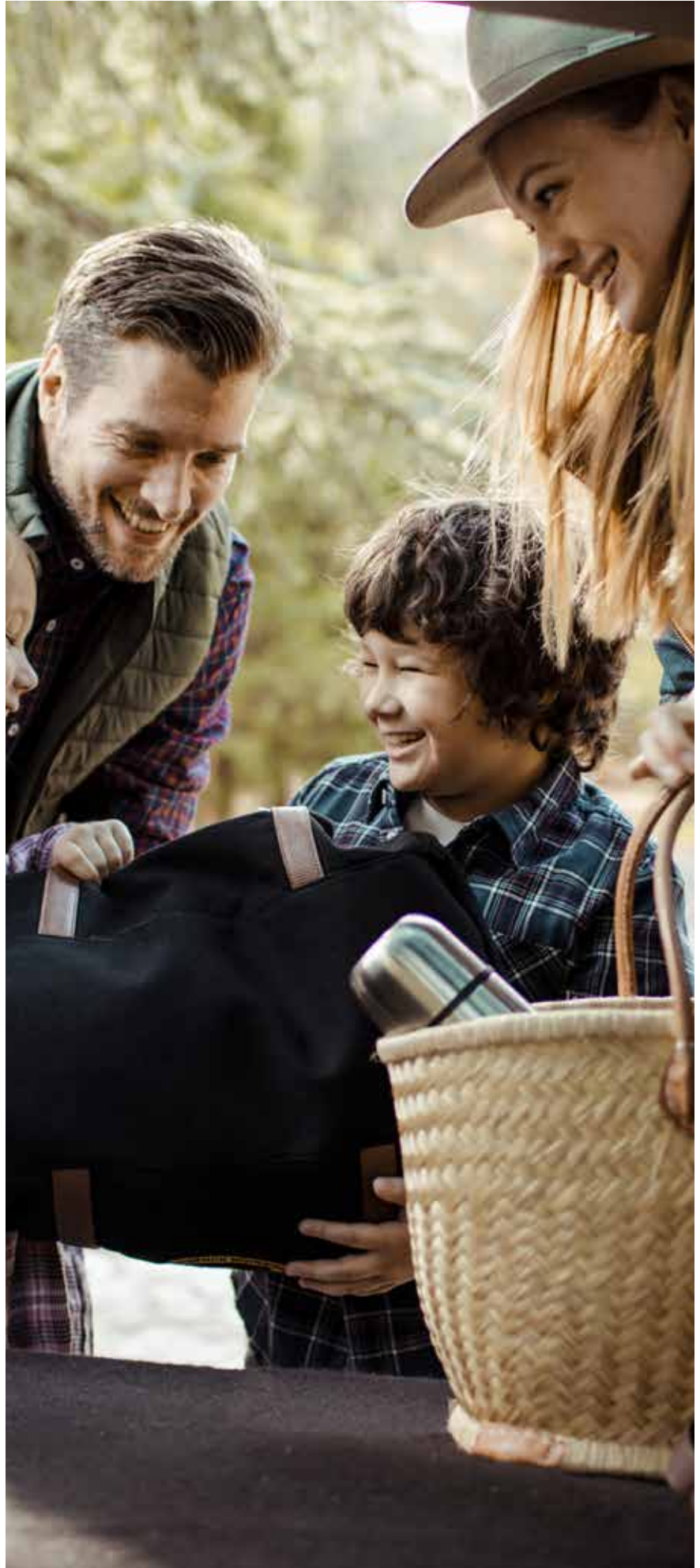
This section is informed by representative market research of the Victorian market, undertaken by Urban Enterprise for Moorabool Shire. This demonstrates the accommodation preferences of the Victorian market.

A high proportion of the Victorian market would prefer to stay at a self-contained apartment (18%), motel/motor inn (17%) and a luxury hotel (13%) with their travel party. Majority of respondents prefer these accommodation types because they are affordable (34%).

69% of the market are happy to stay in a destination less than 1.5 hours drive from the CBD, highlighting that Moorabool Shire's proximity to Melbourne is not a deterrent for an overnight stay. Rather, accommodation that is aligned to market preferences and quality expectations is required to motivate the market to visit.

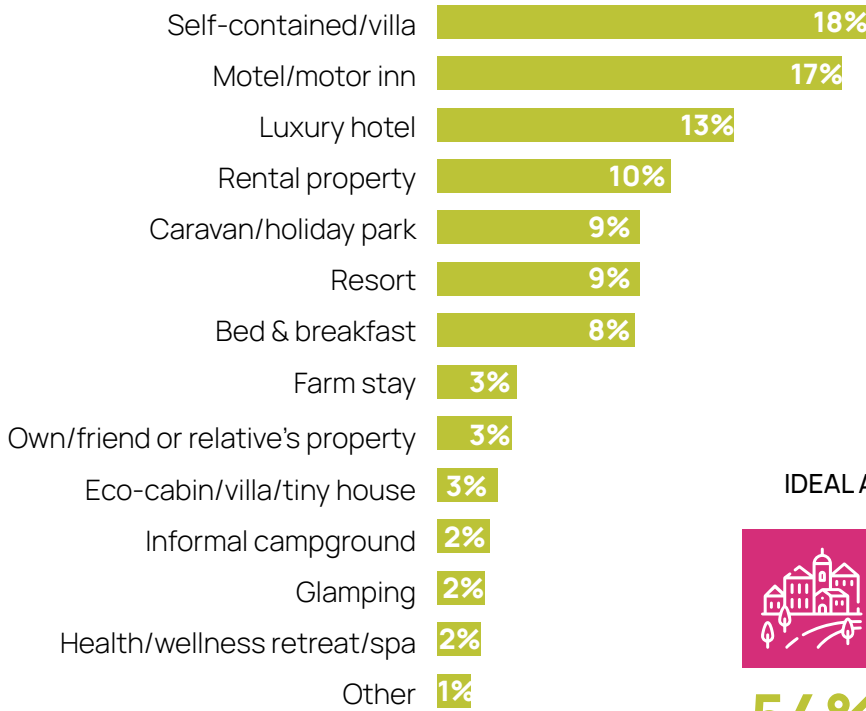
A large proportion of the market seek a rural location and secluded accommodation setting, as well as proximity to the nearest town and attractions.

This indicates the desire to feel immersed in nature and have an escape from the city, whilst still being in close proximity to cafes, restaurants, retail and attractions.



VICTORIAN MARKET ACCOMMODATION PREFERENCES¹⁵

TOP ACCOMMODATION PREFERENCES




69% of the market are happy to stay in a destination less than 1.5 hours drive from the CBD.

IDEAL ACCOMMODATION LOCATION



54%

In a larger town with a range of services and amenities



28%

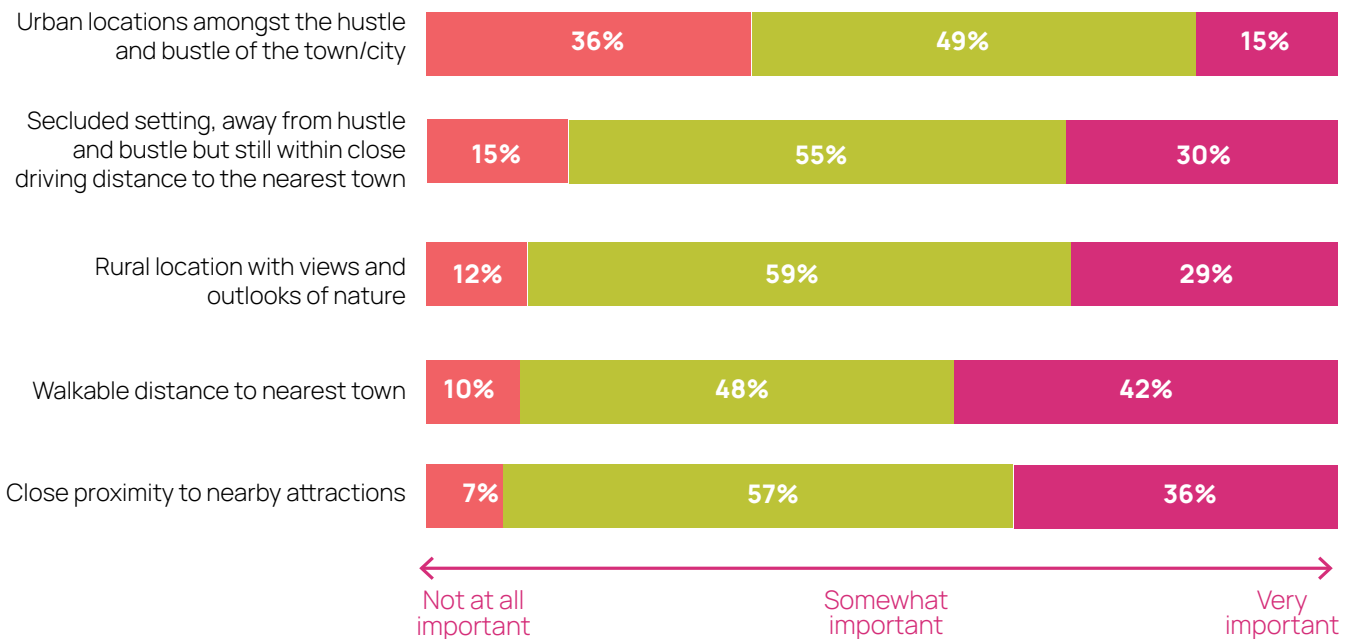
In a smaller, boutique town



18%

A rural area outside of a town

LOCATION AND SETTING PREFERENCES



¹⁵Market Research of Victorian Visitor Market for Moorabool Shire, Urban Enterprise, 2021.



Improvements Sought by Past Visitors¹⁶

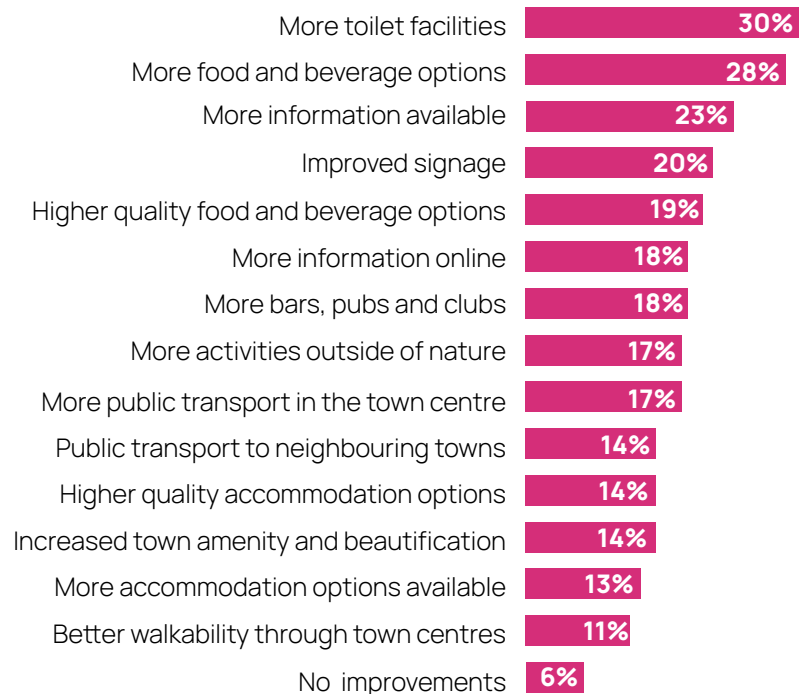
Key improvements suggested relate to the provision of visitor services and amenities, such as more toilet facilities (30%), more visitor information (23%) and improved signage (20%).

Improved food and beverage diversity (28%) and higher quality food and beverage (19%) were also identified as areas for improvement in Moorabool Shire.

“More off-road cycling paths would be good”

“More public transport between destinations”

KEY IMPROVEMENTS IDENTIFIED BY PAST VISITORS TO MOORABOOL SHIRE



¹⁶Market Research of Victorian Visitor Market for Moorabool Shire, Urban Enterprise, 2021.

Gap Analysis

Dining

There is a lack of diversity in the current food and beverage offering in Moorabool Shire. The current offering is predominantly takeaway, country bakeries and cafes, and pub/hotel establishments.

Gaps in the current dining offering include:

- Wineries, breweries and distilleries
- High quality restaurants and cafes
- Artisanal bakeries
- High quality “paddock to plate” experiences

Farm to Table Experiences

Limited local dining establishments use and showcase local produce; this should be encouraged in order to promote the high quality local produce and support the local farming industry.

The following activations are needed to support increased farm to plate experiences:

- Increase awareness of local produce offering through promotion and marketing.
- Encourage businesses to use and promote local and regional produce.
- Farmers market events to showcase local produce and products.
- On-farm experiences, education and activities.

Accommodation Investment

Accommodation is a critical driver of visitation. Market research unveiled that unique/boutique accommodation is enough motivation in itself for a getaway for 18% of the Victorian market.

Accommodation is the most important holiday-decision making factor for 40% of the Victorian market, who will not stay in a destination if the accommodation does not meet their needs and preferences.

The accommodation audit, market research into visitor accommodation demand, and Tourism Research Australia data of visitor accommodation stayed in (benchmarked against other destinations) has demonstrated the private sector investment opportunities.

Opportunities include:

- Health and wellness spa/retreat
- Experiential accommodation, such as farm stays, eco-cabins, tiny homes and glamping
- Small-scale boutique hotels and resorts
- Self-contained accommodation
- Serviced apartments in Bacchus Marsh (e.g. Quest)
- Investment in high quality tourist park accommodation
- Reinvestment in existing caravan parks

Council support is required to enable investment in accommodation, through education about planning zones for developers and ensuring provision of adequately zoned land in areas of demand.





Hero Nature-Based Attractions and Activation

The Shire's nature-based assets are a primary strength for the region and have the potential to drive greater demand.

Currently, many of the nature-based destinations are lacking in visitor infrastructure and amenity, and have been poorly maintained. Improved amenity, infrastructure quality, signage, interpretation, attractions (such as lookouts) and marketing are required to elevate the Shire's nature-based assets.

Gaps include:

- Activation and enhancement of mineral springs precincts
- Investment in shared trails infrastructure for both cycling and walking
- Photo-worthy lookouts and infrastructure
- Multi-day hikes

Cycling

Cycling is a major untapped opportunity for the Shire, with strong growth in cycling across regional Australia, in particular mountain biking, gravel cycling and off-road trail.

Cycling provides an ancillary opportunity for the visitor market, increasing length of stay, yield and improving visitor satisfaction.

Key opportunities in the cycling market include:

- Investment in mountain bike networks in state parks
- Development of a mountain bike park
- Development of cycle friendly towns with bike infrastructure
- Delivery of current projects including Aqualink and Bald Hill
- Development of a rail trail using the disused Bungaree Loop

Arts, Culture, Heritage and Activation

Moorabool's towns and destinations lack a strong arts and culture presence. This activates the region for visitors and enriches the visitor experience.

Arts, culture and heritage experiences provide a strong alignment with Ballarat product and are well suited to Moorabool's potential. Kryal Castle is an example of an attraction that has seen significant growth in awareness and demand, in part due to the substantial promotion by Ballarat.

Blackwood is the only town within Moorabool Shire that is included in the proposed World Heritage area for the Goldfields region. It will be important to ensure that Blackwood benefits from any world heritage listing related opportunity.

In addition, there are a range of disused and underutilised heritage buildings and sites, such as historic buildings in Lal Lal and other towns, which can be further activated.

Opportunities include:

- Develop First Nations art and cultural experiences
- Arts installations and exhibits in disused heritage building
- Development of an art gallery
- Performing arts space

Moorabool Shire has recently completed an Arts and Culture Strategy. This should be considered when exploring activation of arts, culture and heritage products and experiences. All future opportunities for Arts, Culture and Heritage should seek to align with Council's Arts and Culture Strategy.

Events and Festivals

The Shire lacks hero events that can drive demand and awareness. Key events that could be elevated as signature events may include Bacchus Marsh Harvest Festival and Bacchus Marsh Strawberries and Cherries weekends.

Gaps in the current events and festivals offering include:

- Open farm weekends
- Music events
- Arts and Culture events
- Major sporting events at the Bacchus Marsh Racecourse and Recreation Reserve

First Nations Tourism Development

There is significant cultural heritage in Moorabool Shire. There is a need for Council to engage with Traditional Owners on a regular basis, and to support the development of Traditional Owner-led tourism and economic development outcomes.

Opportunities include:

- Indigenous interpretation at key nature-based sites
- First Nations cultural experiences, including guided tours
- Develop First Nations arts and cultural experiences, including potential First Nations gallery in Ballan

Business Events

Business events are a major opportunity for the Shire, given the proximity to Melbourne CBD and Tullamarine Airport.

Given the popularity of neighbouring Daylesford and Macedon Ranges for business events, Moorabool Shire would need to be quite targeted in its event attraction, and may look to attracting the meetings, incentives, conferences and events market, providing team bonding experiences and corporate retreats.

Gaps and opportunities include:

- Contemporary, suitable conference event spaces
- Accommodation to service business market, such as serviced-apartments and hotels
- Corporate retreat experiences

Township Amenity and Visitor Servicing

Investment in signage and wayfinding infrastructure, as well as visitor amenity improvements, is required to provide a quality visitor experience.

Transport and Access

Connectivity via rail is good between Melbourne and Ballarat, however there is a lack of public transport access across the Shire and between the towns and villages.



A close-up photograph of three hands holding three ripe, red and yellow apples. The hands are positioned around the apples, with one hand on the left, one on the right, and one at the top right. The apples are the central focus, showing their natural texture and color variations. The background is blurred, showing hints of other people and a warm, indoor setting.

BRANDING, MARKETING AND VISITOR SERVICING

Existing Council Analysis

Moorabool Shire has little to no involvement in destination marketing and branding activities to promote the Shire.

Current activities undertaken by Moorabool Shire Council are outlined adjacent.



REGIONAL MARKETING

- No formal partnerships at present.
- Council has an MOU signed with City of Ballarat to be involved in marketing activities
- Council collaborates via a Letter of Agreement with Ballarat Regional Tourism
- Council works with Daylesford Macedon Ranges regional tourism board on an ad hoc basis.



BRANDING

- Moorabool Shire and its townships lack a formally developed cohesive brand.



DIGITAL VISITOR INFORMATION

- Moorabool Shire Council lacks a destination website which promotes the region. This is a missed opportunity for the region as preference for digital information sources increases.
- Council operates an Instagram account mostly targeted towards local community.



PHYSICAL COLLATERAL

- Moorabool Shire has produced collateral on an ad-hoc basis.
- The region lacks an official visitor guide or touring maps.



SIGNAGE AND GATEWAYS

- When travelling through Moorabool Shire, the visitor has a fragmented and unclear experience.
- Wayfinding signage is in poor condition and mostly outdated throughout the Shire.
- The Avenue of Honour is a gateway to the Shire, however has been poorly maintained and does not provide an arrival experience.



VISITOR INFORMATION CENTRE

- There is one staffed, accredited visitor information centre (VIC), located at the Lerderderg Library in Bacchus March.
- Volunteers at the VIC are constrained by the lack of physical information available (e.g. maps and guides).



83% of travellers prefer to use their smart phone to access information when visiting a new destination¹⁷. As such, Moorabool Shire needs a strong digital presence.

Recommendations

Digital Visitor Information

Council should develop and maintain a destination website, using the Bacchus Marsh, Ballan and surrounds brand, to showcase the local tourism offering and provide high quality visitor information.

In the first instance, Council should deliver a business operator digital program, which ensures Shire business operators are. Following this, a high quality, but low-maintenance website should be delivered that uses Australian Tourism Data Warehouse (ATDW) listings.

A high proportion of the Victorian market identified their lack of awareness as a barrier when considering a trip to Moorabool Shire. Respondents are unaware of what Moorabool Shire has to offer (36%), as well as a lack of information online (13%) which does not provide confidence in visiting the Shire.

Developing a destination website is costly and time consuming to keep up to date. As such, the ideal model would be for Moorabool Shire Council to operate a streamlined website that uses ATDW listings.

The website should be kept up to date and have a sufficient amount of information available. The website should allow exploration of towns through guides and overviews of where to stay, eat and drink, and things to do, as well as showcase themed touring routes to encourage dispersal.

The website should use highly motivating and inspiring imagery, showcasing hero destinations.

PRECEDENT

Visit Yarra Valley and Dandenong Ranges Official Website

The Visit Yarra Valley and Dandenong Ranges official website is a leader in digital content delivery. It presents best practice approaches to deliver a strong digital presence.

The official website draws on the ATDW database and presents motivating imagery to inspire visitation.



Mont De Lancey
YesterYear Tours



Four Pillars Distillery



Yarrambat Park

¹⁷Moorabool Shire Market Research Survey, conducted by Urban Enterprise, 2021.

Branding

Moorabool Shire should lead its in-house marketing activities with the two destination brands that have the greatest awareness in the marketplace; Bacchus Marsh and Ballan.

Market awareness of Bacchus Marsh (89%) and Ballan (76%) is high amongst the Victorian market. These townships should be leveraged in marketing activity and developed as key towns. Moorabool Shire has low awareness in the market (36%) and should not be utilised in marketing activities.

There is opportunity to develop a Bacchus Marsh, Ballan and Surrounds brand. A successful example is the Bright and Surrounds brand.

Physical Visitor Information and Collateral

In the short-term, Council should look to creating a local touring map that showcases the Shire's key towns, businesses and destinations and attractions. This should be distributed widely to businesses across the Shire and in the visitor information centre.

Once a member of a Visitor Economy Partnership, a regional Official Visitor Guide should be prepared. This would provide the resources to allow a high quality design and production, as well as showcasing a critical mass of products, experiences, accommodation and visitor infrastructure to motivate visitation.

It is not recommended that Council prepares much of their own collateral in the short-term, as it is resource intensive and costly, with only very limited amounts of products and experiences within the Shire to showcase.

Signage and Gateways

Currently, signage across the Shire is outdated, often unclear and at some locations there is signage pollution. Signage should be reviewed, updated and streamlined across the Shire to ensure a cohesive brand is carried throughout the Shire and visitors are welcomed by clear and engaging signage.

Council is currently preparing a Gateways Strategy, which will guide the treatment, hierarchy and design of gateway signs to the Shire's towns. A tourism signage strategy is required to improve wayfinding to tourism businesses and attractions, directional signage, as well as consider destination gateway interventions to provide a sense of arrival into the region as a destination.

Both signage and gateways should be delivered in line with Council's visitor economy Brand Strategy, once prepared.

PRECEDENT

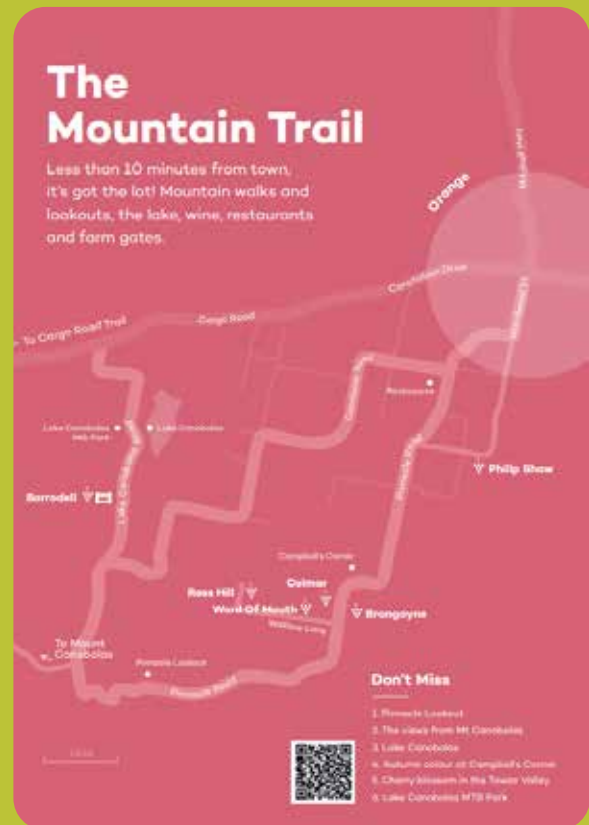
Bright and Surrounds, VIC

Marketing and brands developed for the Alpine Shire with the focus on the key recognised townships as the lead destination brands.

PRECEDENT

Orange360, Orange City NSW

Orange360 has developed a visitor guide which has strong buy in from tourism business and links to both the brand and website content.





GOVERNANCE AND RESOURCING

Tourism Governance Context

The following table outlines the current tourism governance structures responsible for delivering tourism in relation to Moorabool Shire.

Council is encouraged to maintain a strong relationship with State authorities and organisations to ensure alignment to Visit Victoria marketing initiatives. Maintaining a strong relationship with Parks Victoria and DEECA is encouraged to ensure development and promotion of nature-based tourism in Moorabool Shire.

At the regional and local levels, there is a lack of tourism organisations or industry representative groups that support the Moorabool Shire visitor economy. This has a negative impact on the tourism industry and its ability to promote and market itself to the broader market.

GOVERNANCE STRUCTURE

State Level

Visit Victoria

The primary tourism and events organisation for the Victorian State Government and is involved in research and advocacy, as well as domestic and international marketing.

Tourism, Events and Priority Infrastructure

State Government branch responsible for strengthening the tourism and events profile within government. The branch is also involved in research and advocacy activities, as well as influencing strategic reforms and economic outcomes for the sector.

Regional Development Victoria (RDV)

Supports the economic development of rural and regional areas within Victoria by working with regional businesses, communities and all levels of government to support advocacy efforts and provide funding for infrastructure and business investment.

Department of Energy, Environment and Climate Action (DEECA)

Focus on creating a liveable, inclusive and sustainable Victoria with thriving natural environments, managing Victoria's parks and reserves, state forests, waterways, coasts and marine environments, with Parks Victoria, VicForests, water authorities and committees of management.

Parks Victoria

State authority managing a number of key state parks and reserves within Victoria.

Regional Level

Daylesford Macedon Tourism

Regional tourism board responsible for tourism promotion in the Daylesford and Macedon region through marketing and partnerships with industry, local government and Visit Victoria.

Tourism Midwest Victoria

Tourism Midwest Victoria is a peak tourism industry body designed to strengthen and grow Midwest Victoria's visitor economy. The newly defined tourism region encompasses five local government areas, including Ballarat, Pyrenees, Moorabool, Hepburn and Golden Plains.

City of Ballarat

Undertakes marketing and supports product development.

Local Level

Moorabool Shire Council

Council acts as an enabler for the visitor economy by providing the foundations, including strategic planning, infrastructure, visitor information services, assistance in product development, investment attraction, and support to the local industry.

Farming Moorabool

A volunteer-based group that advocates and provides a platform for food producers across Moorabool Shire.

Blackwood Progress Association

Local association that aims to bring the community together, raise money for community projects and enhance town profile.

Ballan and District Chamber of Commerce

An independent non-for profit body that supports the local business community.



Council Resourcing and Events

Council currently has 3.4 FTE resources allocated to economic development, which includes tourism and visitor servicing components. There are no dedicated tourism, events or visitor servicing roles, as the responsibilities are shared across the staff roles.

At present, the staffing structure results in the roles being highly operational and less strategic.

Council roles currently include processing of both tourism and community event permits. Council is currently undertaking an event permit review to streamline event permit processing.

Event Funding

Council provides two annual grant streams for tourism events, totalling \$37.4k in annual funding.

The current event funding pool is too small to have a substantial impact on the visitor economy by driving event growth or attracting new events. Other comparable Councils provide significantly greater annual funding for tourism events, such as Macedon Ranges Shire Council (\$95k) and Alpine Shire Council (\$200k).

A review of tourism event funding is required to ensure the grant funding pool can be used most effectively to support events that will have significant economic benefit to the Shire.

The current event funding pool is too small to have a substantial impact on the visitor economy by driving event growth or attracting new events. Other comparable Councils provide significantly greater annual funding for tourism events, such as Macedon Ranges Shire Council (\$95k) and Alpine Shire Council (\$200k).

A review of tourism event funding is required to ensure the grant funding pool can be used most effectively to support events that will have significant economic benefit to the Shire.

Regional Tourism Involvement

Victoria's regional tourism boards are in the process of transitioning to Visitor Economy Partnerships (VEPs). The move to VEPs was a key recommendation of the Victorian Government's Visitor Economy Recovery and Reform Plan, a decision that resulted from a regional tourism review in 2019.

Currently, Moorabool Shire is not formally a member of any regional tourism board, and has not yet agreed to a Visitor Economy Partnership grouping. Council has an MOU signed with City of Ballarat to be involved in marketing activities, and works with Daylesford Macedon Ranges regional tourism board on an ad hoc basis.

The Shire misses out on major tourism promotion and funding opportunities, due to its lack of a formal connection with a Regional Tourism Board or Visitor Economy Partnerships.

What's the benefit of belonging to a Visitor Economy Partnership?



- **Access to State Government funding streams only available through a formally recognised regional tourism structure.**
- **Leveraging strong brand and market awareness.**
- **Regional tourism marketing expertise and greater marketing reach due to larger budgets.**
- **Inclusion within a critical mass of products and experiences, providing a compelling reason for visitation.**

Recommendation

In the medium to long-term, it is recommended that Council look to forming a Visitor Economy Partnership, in addition to the recommended in-house marketing and visitor servicing activities. This will ensure Moorabool Shire Council has access to State Government funding opportunities and regional marketing expertise and reach.

A strong potential model is partnership with City of Ballarat and Pyrenees Shire, a relationship which will provide mutual benefit for the three Councils, leveraging the strength and opportunities associated with a regional city, as well as the smaller Councils providing rural amenity and experiences such as agritourism, nature and rural accommodation.

Partnership with the City of Ballarat presents a strong opportunity for the Shire, given the strategic alignment between Moorabool Shire's potential offering and Ballarat's current offering and awareness, as well as the scale, market awareness, and resources.

There is potential for a Visitor Economy Partnership to include (but not be limited to) Moorabool Shire, Pyrenees Shire and City of Ballarat, allowing Moorabool and Pyrenees to provide a hinterland food, wine and nature experience to Ballarat, and allowing the smaller Shires to leverage the strengths of a regional city.

PRECEDENT

Orange360, Orange City NSW

Orange 360 provides a strong, highly comparable case study that a VEP for the region could look to adapting. The regional tourism organisation has had strong success through buy-in from local Councils and local industry, leveraging the strength of Orange regional city brand and scale, to grow the visitor economy of all three Councils (Orange, Blayney and Cabonne).

This will provide significant benefit to Council. Councils in the Orange Region have achieved 11% annual growth in visitation the last 5 years since the establishment of Orange 360.



Industry Engagement

Existing Situation

Currently, Council does not have a formal industry engagement process with the local tourism industry. The only local groups are the Ballan Chamber of Commerce and the Blackwood Progress Association, although these groups are quite small.

Council operates a range of networking and business development events to support industry development.

Given the size of the Shire and various regional and local organisations involved in the visitor economy, it is critical that there is formalised industry engagement and strong industry representation. This will help to develop local businesses and build capacity, which will enhance the provision of services, amenity and overall experiences for visitors.

Recommendations

Council will support industry development through the formation and support of Business Associations in the Shire. These associations will represent strategic geographic areas, with a scale of businesses to justify the organisations, including Bacchus Marsh and Surrounds and Ballan and Surrounds. These business associations will include the smaller towns and hamlets of the Shire.

In addition, industry development will be undertaken via the Visitor Economy Partnership to ensure strong, tourism-specific leadership and intelligence can be provided to foster growth of the local industry.

These business associations will undertake a variety of activities covering both tourism and economic development. Council would liaise with the business community directly through these associations, through Council's economic development officer roles.

In relation to tourism, the groups would undertake, at a high level, strategic tourism planning, local marketing initiatives, plan and operate small events, provide industry networking, assist in local product development, and identify local tourism priorities.

Council should still continue to organise Shire-wide business events that will unite the local industry and provide opportunities for industry development and networking, such as the successful Women in Business Lunch.

Refer to Moorabool Shire's Economic Development Strategy for further detail regarding the group structures, role and remit.

STRATEGIC CONSIDERATIONS



Awareness, Marketing and Brand Considerations

- 1** To build market awareness, focus marketing and promotion in towns that have high market awareness and resonate with the consumer. These are Bacchus Marsh and Ballan.

Market awareness of Bacchus Marsh (89%) and Ballan (76%) is high. These townships should be leveraged in marketing activity and developed as key towns. Between 50-60% of the market have never heard of the Shire's remaining towns.

When prompted, only 36% of the Victorian market have heard of Moorabool Shire. Council names are not destinations and should not be utilised in marketing activities.

- 3** Leveraging proximity to and awareness of Ballarat and Daylesford will support visitation growth to Moorabool Shire.

When compared to surrounding and comparable destinations, there is a significant lack of awareness of the Shire. Linking with Ballarat and Daylesford will assist in building demand for visitation to Moorabool Shire.

- 2** Lack of motivating products and experiences influences the low market interest and awareness of Moorabool Shire towns.

Almost half the market are not interested in visiting Bacchus Marsh (47%) or Ballan (43%). This indicates lack of motivating products and experiences as well as low awareness of product offering.

- 4** Leverage the Shire's comparative advantage of a 'rural escape in proximity to Melbourne' by maintaining local character, rural amenity and utilising heritage buildings.

The Shire's comparative advantages lie in its proximity to Melbourne, being under an hour from Melbourne's CBD yet still providing a rural escape, with 75% of the shire made up of waterways and state forest.

There has been strong growth in young families moving from inner Melbourne suburbs seeking the Shire's rural lifestyle and amenity. This has seen an increasingly strong local economy that provides strong opportunities for local operators.

Driving Demand

1 Development and promotion of hero attractions is critical to driving demand and awareness. Nature-based attractions and Aboriginal experiences provide this opportunity.

Aside from Kryal Castle (57%), only nature-based attractions including Werribee Gorge (37%) and Wombat State Forest (32%) had some awareness in the market. Development and promotion of hero attractions will drive awareness.

2 Events and Festivals are a vehicle to drive demand and awareness in the market, and would motivate 48% of the Victorian market to visit a new destination.

Market research found that events and festivals involving fresh produce and local products would greatly motivate the Victorian market to visit a destination in Moorabool Shire. Specifically, the visitor market would be most motivated by farmers markets, food and wine events and 'pick your own' produce events¹⁷.

3 Agritourism, food and wine, nature, and arts, culture and heritage, have opportunity to be developed as the Shire's product pillars, and have strong strategic alignment to the broader region.

This is supported by industry and community, who believe the top experiences that could be enhanced in Moorabool Shire are agritourism (65%), arts and culture (47%) and access to nature-based assets (41%).

There is opportunity to build the current culture and arts offering to add depth and richness to the visitor experience and activate towns. In particular, the existing boutique offering at Ballan could be strengthened with culinary and arts experiences, as well as further heritage activation of Blackwood in line with the towns involvement in the Goldfields World Heritage bid.

4 Development of high quality, contemporary accommodation is critical for Moorabool Shire. Comparable destinations, such as Yarra Valley, attract high levels of overnight visitation due to having a quality accommodation supply, as well as having a compelling product offer.

The Shire has a small accommodation supply, with 20% of visitors to the Shire staying in commercial accommodation, compared to 44% for benchmarked destinations on average (TRA). In addition, the current accommodation offering does not meet visitor expectations for high quality accommodation.

Market research highlights that visitors are seeking boutique and high-quality accommodation in proximity to townships but with natural amenity, which is well aligned to Moorabool's potential.

¹⁷Market Research of Victorian Visitor Market for Moorabool Shire, Urban Enterprise, 2021.

Visitor Economy Foundations And Support

1 Council's role is to provide the foundations for a successful visitor economy. This includes infrastructure, visitor services and a supportive internal Council.

There is a need for enabling infrastructure to be provided that will support development of the tourism industry. This includes telecommunications, roads and services infrastructure, streetscaping and amenity, and visitor servicing including digital presence.

Industry and investor confidence can be strengthened through Council's proactive approach to facilitating investment as well as through Council's demonstrate investment in the visitor economy, including delivery of the new destination website, new brand, promotion of hero assets and industry engagement activities.

2 Township amenity, activation, and attraction of new contemporary food and retail businesses is key to developing as a visitor destination. Critical product mass in townships is needed to motivate visitation.

Moorabool Shire has small and disconnected townships that lack critical mass of products, experiences and infrastructure.

Top improvements suggested by past visitors to Moorabool Shire through the market research survey include:

- More toilet facilities (30%)
- More food and beverage options (28%)
- More information available (23%)
- Improved signage (20%)

3 Strengthen and support the tourism industry to become 'Visitor Ready' through training, capacity building, and supporting skilled workforces attraction.

Fragmented and localised industry representation is a barrier for tourism development as a holistic destination. The Shire's industry lacks collaboration and direction. A strong visitor economy strategy can assist with this.

There is need for industry development and capacity building in order to address issues for the tourism industry, which include:

- Creating visitor ready products and experience
- COVID-19 recovery
- Digital capacity
- Staff shortages and skills shortages

STRATEGIC FRAMEWORK



Moorabool Shire will establish itself as a thriving destination by embracing strengths in agritourism and nature, developing compelling new experiences, and building a strong identity.



VISION

OBJECTIVES

- Establish hero products, experiences and major events to drive visitation and increase market awareness.
- Support investment in contemporary products and supporting infrastructure that position Moorabool Shire as an attractive visitor destination.
- Create critical product mass through focused investment at key visitor nodes.
- Enhance visitor servicing, marketing and promotion to encourage increased visitation, yield and dispersal across the Shire.
- Foster and empower a strong, connected and visitor ready tourism industry.

PERFORMANCE TARGETS

Target 1

180k Overnight Visitors

Increase overnight visitation to Moorabool Shire from 123,000 to 180,000 by 2027.

Target 2

\$120M Spend p.a

Grow visitor expenditure from \$65 million per annum to \$120 million per annum by 2027.

These targets will be reached in part by organic visitation growth, as well as Council delivery of the Visitor Economy Strategy projects and actions to support industry growth.



STRATEGIC THEMES & PRIORITY PROJECTS

Key themes to guide future investment have been identified in response to strategic considerations and objectives for tourism development in Moorabool Shire.

Priority projects have been assessed against current objectives and themes. Projects that best address critical issues or opportunities for Moorabool Shire have been prioritised.



1



2

THEME

Branding, Marketing and Resourcing

Enabling the Visitor Economy

FOCUS

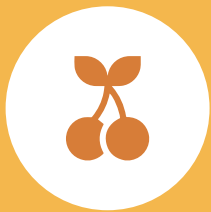
Develop a strong brand identity through marketing, collateral and digital to promote increased awareness of the Shire's offering.

Deliver high quality accommodation and infrastructure to support development of a strong and accessible tourism industry.

PRIORITY PROJECTS

- Digital Marketing and Visitor Servicing Action Plan
- Brand Strategy
- Governance and Resourcing

- Investment Attraction Strategy
- Infrastructure Advocacy and Delivery
- Small Towns Placemaking and Activation Plan



3

Food, Farmgate and Ferments

Leverage the region's high quality agricultural produce to develop a motivational and contemporary agritourism and foodie scene.

- Bacchus Marsh Local Produce Brand
- Farmgate Experience Development and Enhancement



4

Nature and Outdoors

Activate and celebrate the natural environment through investment in infrastructure, trails and interpretation.

- Natural Attractions Masterplan
- Trails Investment Masterplan



5

Events

Utilise events as a destination awareness driver by building a strong events calendar, events infrastructure and enhancing resourcing and internal processes.

- Signature Events Attraction
- Internal Events Processes and Resourcing
- Events Venue Feasibility Study



6


Arts, Culture and Activation

Improve the visitor experience through a focus on vibrant high amenity townships, art, culture and heritage.

- Bacchus Marsh and Ballan Key Township Activation
- Art Gallery Development
- Avenue of Honour Activation Masterplan
- Heritage and Arts Activation Program

PRIORITIES AND ACTIONS





Action plans have been prepared to guide the delivery of projects under each theme. The following provides a guide for interpreting the action plans.

Priority Projects

In order to identify priorities, each project has been assessed against the overarching objectives. Projects that best meet these objectives and address critical issues or opportunities for Moorabool Shire have been prioritised above others.

Projects have been identified using the following priority levels:

- Short term (within 1 year)
- Medium term (1-3 years)
- Long term (4 years +)

Delivery Responsibility and Resourcing

Stakeholders have been identified for each action, including both the leading stakeholder and the supporting/enabling stakeholders.

It is intended that Council may be required to initiate a number of identified projects and lead their direction, however initiatives may be delivered in partnership with industry and State Government.

Additionally, a range of strategic planning projects have been identified that would support growth in the visitor economy, which should be led by council and may require additional government funding.

Unless specified as recurring costs, costs presented in the action plans are one-off.

Additional Council resources may be required to successfully deliver the projects identified in the Strategy. It is recommended that Council reviews internal resourcing and the need for additional investment.



THEME 1

Branding, Marketing and Resourcing

Develop a strong brand identity through marketing, collateral and digital to promote increased awareness of the Shire's offering.

PRIORITY PROJECTS

Digital Marketing and Visitor Servicing Action Plan

Develop and deliver a digital marketing and visitor services strategy for Moorabool.

A major gap for promotion and visitor services for Moorabool Shire is online presence, motivational digital marketing and online information. A digital marketing and visitor strategy for Moorabool should consider:

- Prepare a digital strategy, with consideration of how to create a strong digital presence, including:
 - Development of a 'Visit Bacchus Marsh and Surrounds' destination website.
 - Ensuring destination website links with Ballarat and Daylesford Macedon Ranges where relevant.
 - Undertaking a social media plan.
 - Collaboration with stakeholders, such as Parks Victoria, DEECA and Visit Victoria, to ensure Moorabool Shire content is featured in marketing materials and image databases.
 - Local ambassador identification and actions to encourage promotion.

Brand Strategy

Develop a Brand Strategy for Bacchus Marsh, Ballan and surrounds, considering the need for a unique and contemporary brand.

A brand strategy is required to promote the key destinations in Moorabool Shire. Market testing highlights very low awareness of Moorabool Shire and its nature-based assets, but higher awareness of the two larger hubs of Bacchus Marsh and Ballan. Leveraging off these two destinations, which also have the largest business bases to service the tourism sector, will be important. This should also link to the online presence of Moorabool.

Governance and Resourcing

Allocate additional resourcing to support marketing and promotion and industry development.

Council should consider increased resourcing to support the visitor economy, particularly in the fields of marketing and industry development.

OTHER PROJECTS

- Develop and promote a range of digital and physical touring itineraries, which may include seasonal 'pick your own' marketing campaigns and touring routes.
- Deliver a signage strategy that considers wayfinding and tourism signage to connect the Shire and its tourism experiences.



Action Plan

Strategy	Action	Stakeholder/s		Time frame
		Lead	Partner	
Develop and deliver a digital marketing and visitor services strategy for Moorabool.	<ul style="list-style-type: none"> Appoint a digital marketing agency to assist with the preparation of a digital marketing strategy with consideration of: <ul style="list-style-type: none"> A motivational destination website. Enhancing the presence of Ballan, Bacchus Marsh, villages of Moorabool and nature-based assets. Social media strategy. Content creation and positioning. 	Moorabool Shire Council		Short
Develop a Brand Strategy for Bacchus Marsh, Ballan and surrounds, considering the need for a unique and contemporary brand.	<ul style="list-style-type: none"> Prepare a brand strategy for Moorabool focusing on Bacchus Marsh and Surrounds and Ballan and Surrounds. 	Moorabool Shire Council		Short
Allocate additional resourcing to support marketing and promotion, and industry development.	<ul style="list-style-type: none"> Prepare a business case for greater resource allocation towards visitor economy. 	Moorabool Shire Council		Short
Undertake a 'business digital presence' program to improve online operator visibility and quality.	<ul style="list-style-type: none"> Allocate funding to run training sessions to promote online presence through web development, google listings, uptake of ATDW listings, and use of social media. Appoint a specialist trainer to conduct sessions to promote and educate on the use of digital for businesses. 	Moorabool Shire Council		Medium
Develop and promote a range of digital and physical touring itineraries, which may include seasonal 'pick your own' marketing campaigns and touring routes.	<ul style="list-style-type: none"> Develop touring itineraries based on products, experiences and linkages with other LGAs. Develop collateral and/or digital content. 	Moorabool Shire Council		Medium
Deliver a signage strategy that considers wayfinding and tourism signage to connect the Shire and its tourism experiences.	<ul style="list-style-type: none"> Undertake a signage audit. Appoint a specialist consultant to prepare a signage strategy for Moorabool with links to brand and marketing work, as well as Gateways Strategy. 	Moorabool Shire Council		Long



THEME 2

Enabling The Visitor Economy

Deliver high quality accommodation and infrastructure to support development of a strong and accessible tourism industry.

PRIORITY PROJECTS

Investment Attraction Strategy

Prepare an Investment Attraction Strategy to facilitate private sector tourism investment in Moorabool Shire.

The strategy aims to unlock investment in Moorabool Shire by providing a framework that provides confidence to investors by promoting the growth opportunities associated with target markets and identifying potential sites for investment with appropriate land uses.

The strategy should target the following:

- New contemporary dining options in Ballan, Bacchus Marsh and rural villages.
- Investment in a range of accommodation typologies, including:
 - Health and wellness spa/retreat.
 - Experiential accommodation, such as farm stays, eco-cabins, tiny homes and glamping.
 - Small-scale boutique hotels and resorts.
 - Self-contained accommodation.
 - Serviced apartments in Bacchus Marsh (e.g. Quest).
- Investment in high quality tourist park accommodation.
- Reinvestment in existing caravan parks.
- Boutique, small-scale accommodation in smaller towns and rural areas.
- Major accommodation in Bacchus Marsh to support the business market, VFR, MICE events and facilitate development of major festivals and events (E.g. Quest).
- Accommodation that leverages natural assets (E.g. Tourist Park adjacent to Lal Lal Reservoir).

Infrastructure Advocacy and Delivery

Advocate for and deliver improved infrastructure to support the development of the tourism industry.

There is a need to seek investment in digital connectivity, transport infrastructure and services infrastructure to support investment in the region. Infrastructure needs are explored in greater detail in the Economic Development Strategy, however will have a significant impact on the opportunity to attract investment in the tourism sector.

Small Towns Placemaking and Activation Plan

Activate key townships and provide amenity and experiences to support local visitor economies.

Building on the Small Towns and Settlement Strategy, this plan should focus on activating key townships and settlements across the Shire and promoting growth of the local economies through the following activities (that can also support visitation and enhance the visitor experience):

- Define the role of key towns and long-term vision;
- High-street enhancements (e.g. streetscaping);
- Public realm and open space improvements;
- Infrastructure requirements;
- Service provision opportunities; and
- Business attraction opportunities.



Action Plan

Strategy	Action	Stakeholder/s		Time frame
		Lead	Partner	
Prepare an Investment Attraction Strategy to facilitate private sector tourism investment in Moorabool Shire.	<ul style="list-style-type: none"> Undertake an investment attraction strategy and prospectus focusing on gaps in tourism product such as accommodation and food related investment. Deliver information on tourism development in rural areas, including planning related guidelines to assist investment. 	Moorabool Shire Council		Short
Advocate for and deliver improved infrastructure to support the development of the tourism industry.	<ul style="list-style-type: none"> Prepare an advocacy plan and pitch document to promote investment infrastructure needs and funding. 	Moorabool Shire Council		Ongoing
Activate key townships and provide amenity and experiences to support local visitor economies.	<ul style="list-style-type: none"> Appoint a specialist consultant to develop a Small Towns Placemaking and Activation Plan, building on the Small Towns and Settlement Strategy, to activate the key towns and settlements. This strategy should identify: <ul style="list-style-type: none"> A long-term vision and role of key towns; Town centre enhancements; Public realm improvements; Infrastructure requirements to enable growth; and Business attraction and investment opportunities. 	Moorabool Shire Council		Medium



THEME 3

Food, Farmgate and Ferments

Leverage the region's high quality agricultural produce to develop a motivational and contemporary agritourism and foodie scene with Moorabool Shire to own the 'pick your own' experience.

PRIORITY PROJECTS

Agribusiness Branding

Build a local produce brand to increase awareness of local offering, leveraging the awareness of Bacchus Marsh as a high-quality produce destination.

Build a local produce brand to increase industry and consumer awareness of local agricultural output, capitalising on the high quality produce originating from Moorabool Shire.

In particular, there is opportunity to build on Bacchus Marsh's credentials as a food bowl to create a local food brand that can be used broadly in the region. Consider marketing of Goulburn Valley as an example of food product marketing.

Further investigation should be undertaken on the focus of this initiative, which could range from a Shire-wide corporate brand to a more localised version (e.g. Bacchus Marsh fruit and vegetable production).

Having a well-established brand will support businesses in the region through enhanced marketing of the produce, expanding its market appeal and subsequently increasing the volume of sales and reach to domestic and international export markets.

Farmgate Experience Development and Enhancement

Promote value adding to farming and food production with the establishment of farm gate, tastings and other on farm experiences.

Key considerations include:

- Explore downstream processing opportunities and associated visitor experiences, including alcohol e.g. cider, liqueurs etc and enhance farmgate with value-add experiences.
- Enhance and develop business offerings to become 'visitor ready', through delivery of industry training and exploration of funding opportunities for business upgrades.
- Work with local industry to develop and package unique on-farm experiences, including exploring education opportunities, hands-on farm experiences, and farmstays.

OTHER PROJECTS

- Undertake a campaign to local and regional business operators to encourage businesses to use local Moorabool Shire produce, such as Sher Wagyu and truffles.
- Development of a seasonal Shire-wide farmers market, rotating across key towns of Ballan, Blackwood and Bacchus Marsh.



Action Plan

Strategy	Action	Stakeholder/s		Time frame
		Lead	Partner	
Build an agribusiness brand to increase awareness of local offering, leveraging the awareness of Bacchus Marsh as a high-quality produce destination.	<ul style="list-style-type: none"> Establish a food group steering committee to oversee the development of a food produce brand for Bacchus Marsh and producers across the Shire more broadly. 	Moorabool Shire Council	Industry	Medium
Promote value adding to farming and food production with the establishment of farm gate, tastings and other on farm experiences.	<ul style="list-style-type: none"> Promote downstream processing opportunities and associated visitor experiences, including alcohol e.g. cider, liqueurs etc and enhance farmgate with value-add experiences through the investment prospectus. Deliver training and education to support a visitor ready food industry. Work with local industry to develop and package unique on-farm experiences, including exploring education opportunities, hands-on farm experiences, and farm stays. 	Moorabool Shire Council	Industry	Short
Undertake a campaign to local and regional business operators to encourage businesses to use local Moorabool Shire produce, such as Sher Wagyu and truffles.	<ul style="list-style-type: none"> Establish an action plan with producers to promote locally produced goods to retailers and tourism enterprises. 	Moorabool Shire Council	Industry	Medium
Support development of a seasonal Shire-wide farmers market, rotating across key towns of Ballan, Blackwood and Bacchus Marsh.	<ul style="list-style-type: none"> Undertake a feasibility study for the establishment of a farmers market with consideration of location, frequency and management. 	Moorabool Shire Council	Industry	Medium



THEME 4

Nature and Outdoors

Activate and celebrate the natural environment through investment in infrastructure, trails and interpretation.

PRIORITY PROJECTS

Natural Attractions Masterplan

Undertake a Natural Attractions Masterplan focusing on investment in Moorabool's nature assets.

The Masterplan will consider the following opportunities:

- Enhance the visitor experience at Werribee Gorge State Park.
- Prepare a precinct concept plan for Lal Lal Falls in collaboration with Wadawurrung Traditional Owners, considering the need for improved access, cultural interpretation, upgrade to walking trails and viewing platforms.
- Develop Ballan as an arboretum.
- Activating Parwan Lava Tubes with signage and interpretation outside of the caves.
- Undertake an audit and infrastructure and product investment plan for of all swimming holes/waterways/lakes/reservoirs, such as Colbrook, and also Pykes Creek.
- Consider nature based accommodation investment in and around nature reserves.
- Explore opportunities to activate assets, such as the Triassic Trench and Spargo Mineral Creek.
- Development of relationships with water authorities/catchments to collaborate and unlock opportunities.

Trails Investment Masterplan

Undertake a Trails Masterplan with consideration of recreation, bushwalking, mountain biking, road and gravel cycling across Moorabool.

The Trails Masterplan will consider:

- Commencement points at Bacchus Marsh and Ballan railway stations from existing nature assets and trail links.
- Deliver cycle friendly town infrastructure, including maintenance stations (e.g. at train stations), bike storage locations and a delivery of a "cycle friendly business" program.
- Undertake a Masterplan for development of a mountain biking trail network in Bungal State Forest, with trail links to Ballan to maximise economic benefit.
- Include market research to deliver trails aimed at creating iconic trail network across Moorabool.
- Develop a concept plan for a multi-day hike through Lerderderg, connecting Blackwood and Bacchus Marsh. Partner with Parks Victoria to explore the opportunity for temporary accommodation (e.g. glamping).
- Delivery of Aqua Link trails.
- Feasibility study for development of the disused Bungaree rail loop into a rail trail or other trail.

OTHER PROJECTS

- Continue investment in Bald Hill, including walking and mountain biking trails.
- Develop a Moorabool Shire mineral springs precinct plan and activation strategy.
- Develop First Nations Experiences and Interpretation Action Plan.



Action Plan

Strategy	Action	Stakeholder/s		Time frame	Indicative Cost
		Lead	Partner		
Undertake a Natural Attractions Masterplan focusing on investment in Moorabool's nature assets.	<ul style="list-style-type: none"> Establish a steering committee with Parks Vic, DEECA and Moorabool Shire representatives to undertake a natural attractions Masterplan with a master planning consultant. 	Moorabool Shire Council	Parks Victoria DEECA	Medium	\$140K
Undertake a Trails Masterplan with consideration of recreation, bushwalking, mountain biking, road and gravel cycling across Moorabool.	<ul style="list-style-type: none"> Working with local cycling clubs, bushwalking clubs and other stakeholders, develop and implement a Trails Masterplan. 	Moorabool Shire Council	Parks Victoria DEECA	Medium	\$100K
Continue investment in Bald Hill, including walking and mountain biking trails.	<ul style="list-style-type: none"> Advocate for funding to deliver all stages of the Bald Hill Masterplan including mountain bike park, walking trails and other recreation and tourism infrastructure. 	Moorabool Shire Council		Short	N/A
Develop a Moorabool Shire mineral springs precinct plan and activation strategy.	<ul style="list-style-type: none"> Work with the Victoria Mineral Springs Committee, and the local communities to develop and enhance mineral springs assets, including supporting product. 	Moorabool Shire Council	Victorian Mineral Springs Committee DEECA	Long	\$50K
Develop First Nations Experiences and Interpretation Action Plan.	<ul style="list-style-type: none"> Traditional Owners to lead an experience and interpretive plan, supported by local and state Government. 	Traditional Owners	DEECA Parks Victoria Moorabool Shire Council	Medium	\$80K



THEME 5

Events

Utilise events as a destination awareness driver by building a strong events calendar, events infrastructure and enhancing resourcing and internal processes.

PRIORITY PROJECTS

Signature Events Attraction

Identify and attract 3 signature events to Moorabool Shire aligned to market demand.

Council should attract and support the development of three signature events which have the potential to promote the Shire's competitive strengths and grow awareness.

Events attraction should consider providing dispersal of signature events across the year, and consider appropriate timing based on the event type (e.g. appropriate season).

Council should consider providing funding allocation to support three signature events, in areas aligned to Moorabool's brand strength; nature based, food and wine, and / or arts, culture and heritage. Events will be delivered by not-for-profits or commercial events operators.

Internal Events Processes and Resourcing

Review and enhance internal process and resourcing to support tourism events development.

Enhance internal events processes and resourcing, including:

- Review and streamline the permit application process for tourism events.
- Undertake a review of tourism event funding guidelines and criteria.
- Develop and maintain an annual tourism events calendar and promote online.
- Allocate an additional 1 FTE to events attraction, approvals and support.

Events Venue Feasibility Study

Undertake an events venue feasibility study to identify the type and scale of indoor and outdoor events facilities that could be supported in the Shire.

Bacchus marsh provides a good opportunity for accommodation development and investment in business events facilities, there is also need for other events facilities to be developed to support larger scale outdoor and indoor events.

OTHER PROJECTS

- Develop a prospectus for attraction of major sporting events to the new Bacchus Marsh multipurpose indoor stadium.
- Develop a Moorabool Shire Open Farm Weekend Event, inclusive of businesses across the Shire. Support event operators through provision of training and event operation and planning guidelines.



Action Plan

Strategy	Action	Stakeholder/s		Time frame
		Lead	Partner	
Identify and attract 3 signature events to Moorabool Shire aligned to market demand.	<ul style="list-style-type: none"> Identify key existing and new events for development Establish funding to support/attract 3 signature events and a potential event operator. 	Moorabool Shire Council	Events sector	Medium
Review and enhance internal process and resourcing to support tourism events development.	<ul style="list-style-type: none"> Undertake an internal process review of events and resources in order to promote events development in the Shire. Review event funding and consider additional funding allocation to support development of a strong events calendar. 	Moorabool Shire Council		Short
Undertake an events venue feasibility study to identify the type and scale of indoor and outdoor events facilities that could be supported in the Shire.	<ul style="list-style-type: none"> Audit event venues targeted to the needs of events operators to identify event venue development needs. 	Moorabool Shire Council		Short
Develop a prospectus for attraction of major sporting events to the new Bacchus Marsh multipurpose indoor stadium.	<ul style="list-style-type: none"> Work with local sporting clubs to support development of sports tournaments and events which are suited to the Bacchus Marsh indoor stadium. 	Moorabool Shire Council	Sporting Clubs	Medium
Develop a Moorabool Shire Open Farm Weekend Event, inclusive of businesses across the Shire.	<ul style="list-style-type: none"> Work with producers to establish an open farm weekend in Moorabool Shire. 	Moorabool Shire Council	Moorabool producers	Medium
Support event operators through provision of training and event operation and planning guidelines.	<ul style="list-style-type: none"> Engage with event operators to identify skills gaps, and deliver training needs. Develop a Council guide to planning and operating events, including a how-to guide for events permits, to be shared on Council's website. 	Moorabool Shire Council	Event operators	Short



THEME 6

Arts, Culture and Activation

Improve the visitor experience through a focus on vibrant high amenity townships, art, culture and heritage.

PRIORITY PROJECTS

Bacchus Marsh and Ballan Key Township Activation

Develop attractive and vibrant townships through streetscaping, beautification and maintenance of heritage facades to retain local character.

Undertake a township activation strategy for Bacchus Marsh and Ballan with consideration of streetscaping, arts installations, lighting installations and placemaking improvements.

Art Gallery Development

Explore the development of an First Nations gallery in Moorabool Shire, undertaken in partnership with Traditional Owners.

This emerged as an opportunity in discussion with Traditional Owners, through which the positioning of the gallery can be further explored. This would create a new iconic arts destination in Moorabool Shire and draw on the extensive cultural heritage of the region, as well as provide a point of difference to galleries in the surrounding region.

This aligns to one of the eight focus areas in the Arts and Culture Strategy which is to “Connect with our unique heritage and environment”.

Avenue of Honour Activation Masterplan

Activation of the Avenue of Honour.

Develop a cultural walking trail for the Avenue of Honour with consideration of:

- Develop a business case and concept design for the 'Illuminating the Avenue of Honour' project. (Stage 1).

Heritage and Arts Activation Program

Establish an arts activation program across Moorabool's small towns.

This will consider:

- Develop a Lal Lal Arts Installation Series, which includes art installations, lighting and projections at a range of key sites including Lal Lal Historic Railway, Lal Lal Water Tower and Iron Mine and Blast Furnace.
- Undertake audit of disused and underutilised heritage buildings and develop a prospectus for commercial use and activation.

OTHER PROJECTS

- First Nations Cultural Heritage activation.



Action Plan

Strategy	Action	Stakeholder/s		Time frame
		Lead	Partner	
Develop attractive and vibrant townships through streetscaping, beautification and maintenance of heritage facades to retain local character.	<ul style="list-style-type: none"> Undertake an arts led placemaking strategy for Bacchus Marsh and Ballan, including streetscaping. 	Moorabool Shire Council		Medium
Explore the development of a First Nations gallery in Moorabool Shire.	<ul style="list-style-type: none"> Work with Traditional Owners to undertake a feasibility study for an indigenous art gallery in Moorabool Shire. 	Moorabool Shire Council Traditional Owners	Local artists	Long
Activate the Avenue of Honour.	<ul style="list-style-type: none"> Develop a concept plan and business case for the activation of the Avenue of Honour. 	Moorabool Shire Council	Department of Transport and Planning	Short
Establish an arts activation program across Moorabool's small towns.	<ul style="list-style-type: none"> Undertake an arts and cultural masterplan for Moorabool's small towns and villages. 	Moorabool Shire Council	Local artists	Medium
First Nations Cultural Heritage activation.	<ul style="list-style-type: none"> Work with Traditional Owners to identify cultural heritage assets that could be further activated for the visitor economy. 	Traditional Owners Moorabool Shire Council		Medium

Appendix A

Documents Reviewed

Federal Level Documents

- Tourism 2020 Strategy
- A National Business Events Strategy for Australia 2020

State Government Documents

- Victorian Government Visitor Economy Reform Plan
- Valuing Victoria's Parks
- Victorian Visitor Economy Strategy 2016
- Victorian Traditional Owner Cultural Landscapes Strategy

Local Government Documents (Council Strategies/Plans)

- Destination Development Action Plan for Moorabool Shire Council 2009-2014
- Moorabool Destination Management Plan 2013-2018
- Moorabool Council Plan 2021-2025
- Moorabool Shire Community Plan 2030
- Ballan Strategic Plan 2018
- Small Towns and Settlements Strategy
- Moorabool Shire Economic Development Strategy 2015
- Moorabool Shire Council's Art and Culture Strategy 2021-2025
- Moorabool Visitor Services – Strategic Review 2018

Appendix B

Summary of Key Stakeholder Consultation Findings

Products, Experiences and Events

- Lack of events/festivals calendar.
- Lack of arts and culture products/experiences
- Bacchus Marsh main street is primarily professional services – minimal of retail and dining offerings.
- Visitor Information Centre has limited space at current location.
- Werribee Gorge is extremely prone to flooding – dangerous for visitors.
- Avenue of Honour is currently under utilised and in poor condition – activation of the area is needed.
- Werribee Gorge does not have the facilities/amenities to support the increase in visitation it is currently experiencing.
- Diversify accommodation offering, including boutique accommodation.
- Low facilities for campers and visitors to the Brisbane Ranges.
- Lack of motivating products and experiences to get people off the highway.
- Development of nature-based tourism experiences and Indigenous experiences.
- Focus on the agritourism opportunities within the Shire.

Enabling Infrastructure

- Lack of public transport throughout the Shire.
- Lack of motivating accommodation.
- Lack of free camping grounds, including free caravan parking areas.
- Connect Ballarat and Moorabool Shire via bike path/ cycling route.
- Cohesive signage and wayfinding across the Shire.

Markets and Marketing

- Little to no information available to visitors about smaller townships.
- Not currently part of a Regional Tourism Board – limits the exposure and promotion of the Shire.
- Lack of awareness of products and experiences available in the Shire.
- The Shire is not promoted as a visitor destination.
- Proximity to Melbourne and Ballarat presents a major opportunity.
- Increase online presence of businesses.
- Establish Moorabool Shire as a “produce destination” / “food bowl”.
- Develop a brand identity – not aligned to Shire boundary, visitors don’t see shire boundaries.
- Alignment to the Visit Victoria brand.
- Promoting the local makers and creators.
- Shifting the perception that the Shire is a “stopover town”.

Markets and Marketing

- Lack of leadership/initiative in the tourism industry.
- Lack of Council resources/support.
- Lack of leadership initiative in the tourism industry.
- Industry/business collaboration and networking.



The Moorabool Shire Visitor Economy Strategy was prepared by Urban Enterprise in collaboration with Moorabool Shire Council.

Authors of this report are Mike Ruzzene (Director), Agathy Patsouris (Senior Consultant), and Alana Grollo (Consultant).