

MACEDON RANGES VISITOR ECONOMY STRATEGY 2019-2029

MARCH 2019 MACEDON RANGES SHIRE COUNCIL

Urban Enterprise Urban Planning / Land Economics / Tourism Planning / Industry Software

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ACKNOWLEDGEMENT

We acknowledge that Macedon Ranges Shire is located on Dja Dja Wurrung, Taungurung and Wurundjeri Country whose ancestors and their descendants are the traditional owners of this Country.

We acknowledge that they have been custodians for many centuries and continue to perform age old ceremonies of celebration, initiation and renewal

We acknowledge their living culture and their unique role in the life of this region.

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CONTENTS

EXECUTIVE SUMMARY.....	4	4.5. FOOD, WINE AND FERMENTS.....	29
1. INTRODUCTION.....	8	4.6. FESTIVALS AND EVENTS	30
1.1. BACKGROUND.....	8	4.7. ACCOMMODATION	31
1.2. THIS VISITOR ECONOMY STRATEGY	8	4.8. ABORIGINAL CULTURAL HERITAGE EXPERIENCES.....	32
1.3. METHODOLOGY	8	4.9. WELLNESS AND MINERAL SPRINGS	32
1.4. CONSULTATION PROCESS.....	8	4.10. WEDDINGS AND CONFERENCES.....	33
1.5. DELIVERY OF STRATEGY.....	9	4.11. AGRITOURISM	33
1.6. RESPONSIBILITY AND PARTNERSHIPS	9	4.12. FACILITATING INVESTMENT	33
2. STRATEGIC CONTEXT	12	5. VISITOR INFORMATION AND PROMOTION.....	35
2.1. KEY FINDINGS	12	5.1. INTRODUCTION.....	35
2.2. TOURISM TRENDS	12	5.2. KEY FINDINGS	35
2.3. KEY POLICY AND STRATEGY.....	14	5.3. VISITOR SERVICING.....	35
3. MACEDON RANGES VISITOR ECONOMY OVERVIEW.....	16	5.4. MARKETING	36
3.1. INTRODUCTION.....	16	6. STRATEGIC DIRECTIONS	37
3.2. KEY FINDINGS	16	6.1. INTRODUCTION.....	37
3.3. ESTIMATED VISITATION.....	17	6.2. DIRECTION A: PROMOTION AND BRAND AWARENESS.....	38
3.4. ECONOMIC IMPACT OF TOURISM.....	18	6.3. DIRECTION B: DEVELOPMENT OF PRODUCT STRENGTHS AND INVESTMENT IN EMERGING OPPORTUNITIES	38
3.5. VISITOR MARKETS	21	6.4. DIRECTION C: ADVOCACY, INDUSTRY COLLABORATION AND BEST PRACTICE DELIVERY	39
3.6. PROJECTED GROWTH	23	6.5. PRIORITIES	39
4. PRODUCTS AND EXPERIENCES.....	24	7. ACTION PLAN	40
4.1. INTRODUCTION.....	24	APPENDICES	46
4.2. KEY FINDINGS	24	APPENDIX A LITERATURE REVIEW	46
4.3. NATURE BASED TOURISM.....	26		
4.4. ARTISAN VILLAGES	28		

APPENDIX B PSYCHOGRAPHIC SEGMENTS SUMMARY	53
APPENDIX C VISITOR ECONOMY REFERENCE GROUP	55
APPENDIX D REFERENCES.....	55

FIGURES

FIGURE 1 TOTAL VISITORS AND PROPORTION OF TOTAL VISITATION BY TOURISM SUB REGION	18
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TABLES

TABLE 1 VISITOR ECONOMY ROLES AND RESPONSIBILITIES	10
TABLE 2 DOMESTIC VISITOR NIGHTS IN REGIONAL VICTORIA BY PURPOSE OF VISIT FORECASTS 2014/15 – 2024/25	12
TABLE 3 INTERNATIONAL VISITOR NIGHTS IN REGIONAL VICTORIA BY PURPOSE OF VISIT FORECASTS 2014/15 – 2024/25	13
TABLE 4 VISITATION TO MACEDON RANGES SHIRE COUNCIL 2009 - 2016.....	17
TABLE 5 TOTAL VISITATION	17
TABLE 6 VISITOR EXPENDITURE 2009-2016	18
TABLE 7 VISITOR EXPENDITURE BY SUB REGION.....	19
TABLE 8 ECONOMIC IMPACT OF TOURISM IN MACEDON RANGES	19
TABLE 9 TOURISM INDUSTRY BENCHMARKING	20
TABLE 10 PROJECT GROWTH SCENARIOS FOR THE MACEDON RANGES 2016- 2025	23

ACRONYMS

MRSC – Macedon Ranges Shire Council

VFR – Visiting Friends and Relatives (see glossary for definition).

LGA – Local Government Area.

DMT – Daylesford Macedon Tourism

RTB – Regional Tourism Board.

AAG – Average Annual Growth.

CD MOTA – Compact Disc Monitor of Tourism Activity.

SA2 – Statistical Area Level 2 (see glossary for definition).

GLOSSARY OF TERMS

Visitor Economy – Overall demand and supply in all the sectors within which visitor activity and its direct and indirect consequences upon the economy take place. The term visitor economy is wider than the definition of tourism industries, and encompasses all daytrip and overnight visitors (including categories such as business visitors, visiting friends and relatives and shopping visitors).

Holiday Visitors¹ – Visitors who consider their main reason of travel for visiting a particular location for holidays / leisure / relaxation / getting away; entertainment / attending a special event –as opposed to business, visiting friends and relatives or shopping visitors.

VFR Visitors – Visitors who consider their main reason of travel for visiting a particular location for visiting friends (including weddings etc. involving friends); and visiting relatives (including family weddings etc.).

Business Visitors – Visitors who consider their main reason of travel for visiting a particular location for business; conferences / exhibitions / conventions / trade fairs; and training and research (employed - not student).

Other Visitors – Visitors who consider their main reason of travel for visiting a particular location for education (mostly students); employment / leisure (for example, working holiday); personal appointment / business (excluding health); health-related; and providing transport.

Psychographic Segment – Developed from the process of psychographic segmentation which involves segmenting the total market based on the psychology, personality of people, characteristics, lifestyle, attitudes etc.

Statistical Area 2 – A Statistical Area Level 2 (SA2) is one of the spatial units defined under the Australian Statistical Geography Standard (ASGS). The ASGS is a hierarchical geographical classification, defined by the Australian Bureau of Statistics (ABS). The ABS defines a SA2 as ‘a general-purpose medium-sized area built from whole SA1s. Their aim is to represent a community that interacts together socially and economically’

¹ ‘Holiday Visitors’, ‘VFR Visitors’, ‘Business Visitors’, and ‘Other Visitors’ purpose of visit categories as used by Tourism Research Australia in their Tourism Forecasts provided in Section 2.1 are derived from individual ‘stopover reason’/ ‘reason for trip’ within the NVS and IVS respectively.

EXECUTIVE SUMMARY

The Macedon Ranges Visitor Economy Strategy intends to set the long-term vision and strategic direction to support the sustainable growth of the future visitor economy.

This strategy is supported by the Council Plan priority to 'enhance the social and economic environment', which has the aim of encouraging economic vitality (tourism, agribusiness, buy local, local employment options) and to attract strategic investment that is consistent with Council's vision.

Located less than an hour's drive from Melbourne, the Macedon Ranges is a popular visitor destination, highly regarded for its rural landscapes and natural environments, the iconic landmarks of Hanging Rock and Mount Macedon, the unique character of its heritage villages, food and wine, and the local artisan culture.

The high landscape, environmental and cultural values were officially recognised when the Macedon Ranges was declared a distinctive area and landscape under state planning policy in 2018. The corresponding Draft Macedon Ranges Statement of Planning Policy (SPP) provides a framework to guide implementation of the legislation to ensure these values are protected and conserved. Specific to the visitor economy the SPP includes in its vision that, 'Macedon Ranges has a flourishing and environmentally sustainable visitor economy that respects the area's environmental and cultural values, providing locals and visitors with a variety of high-quality natural attractions and experiences.

This strategy supports the vision and objectives of the SPP by providing the strategic direction to grow a sustainable visitor economy that protects and enhances the values of the Macedon Ranges, which directly support and define its unique brand.

THE MACEDON RANGES VISITOR ECONOMY

Due to its proximity to Melbourne, day-trip visitation is understandably high, and with Melbourne's projected population growth, visitation figures will continue to rise. Day-trip visitation will remain a key focus of this strategy, however increasing the higher yield economic benefits of overnight visitation will be a key objective.

The key target market is the 'Lifestyle Leader' market segment, as they are inclined to stay longer and spend more, and have a particular desire to escape city life and embrace nature/outdoors and new discoveries.

In 2016 Macedon Ranges attracted 1.67 million visitors, with over 1 million daytrip visitors and 654,000 overnight visitors. Macedon Ranges has grown 47% in overnight visitation, 74% in daytrip visitation and 62% in total visitation since 2009. (Macedon Ranges Visitor Economy Impact Study 2017).

Visitation is concentrated predominantly to Kyneton and Woodend sub regions, which together attract 68% of total visitation to Macedon Ranges. This highlights that product development in the eastern corridor of the shire should be a key consideration to support the visitor economy in this area and encourage visitor dispersal. (Macedon Ranges Visitor Economy Impact Study 2017).

The visitor economy in Macedon Ranges contributes \$456 million in output and 2,355 jobs, making it one of the most important industry sectors for the region. The visitor economy directly supports the industry sectors of retail, food and beverage and accommodation, as well as providing in-direct benefit to a broad range of other service industries. (Macedon Ranges Visitor Economy Impact Study 2017)

Importantly the visitor economy contributes significantly to the lifestyle of residents by providing local employment opportunities and a greater quantity and mix of retail businesses, quality cafes and restaurants, and experiences throughout the region.

Visitation projections show that Macedon Ranges has the potential to attract an additional 1 million visitors by 2025 using a mid-point growth scenario. This highlights the need to develop strategies to ensure the sustainable growth of the visitor economy, where benefits are realised and potential impacts are mitigated.

VISITOR PRODUCT AND EXPERIENCES IN THE MACEDON RANGES

The Daylesford and Macedon Ranges tourism region promotes its brand of 'wellness'. The potential and strength of the Macedon Ranges within the region is in the broader interpretation of wellness as health and relaxation, creativity, and the strong connection with nature and people.

The Macedon Ranges is defined by the character of its historic artisan villages and townships connected by the overarching theme of the 'makers' - as defined by the creative arts, artisanal food, wine and agricultural products, and the increased popularity of workshops. The strong heritage values and townships of Kyneton and Woodend provide a strong motivator for visitation.

The iconic landmarks of Hanging Rock and Mount Macedon already attract large numbers of visitors and will require careful planning and investment in the future to ensure their sustainable management and enhancement of the visitor experience. There are many other lesser known nature reserves, such as the Cobaw Ranges and Wombat State Forest that present an opportunity to improve the nature-based visitor experiences in these areas.

There are many successful established festival and events in the Macedon Ranges such as major concerts at Hanging Rock, Lost Trades Fair, Woodend Winter Arts Festival, Kyneton Daffodil & Arts Festival, Macedon Ranges Wine and Food, Budburst Festival and race days at Hanging Rock. In addition, Macedon Ranges is becoming a popular destination for weddings, leveraging from its high-quality wedding venues, beautiful scenery and strong food and wine credentials.

Cool climate wines are a key feature of the Macedon Ranges tourism product mix, with many wineries dispersed through the shire producing small-batch high quality wines and offering intimate, authentic cellar door experiences.

Emerging product for the Macedon Ranges includes accommodation, Aboriginal cultural heritage experiences, wellness & mineral springs, weddings and conferences, and agritourism.

PRODUCT AND EXPERIENCE ENHANCEMENT OPPORTUNITIES

Key opportunities for product and experience enhancement in Macedon Ranges include:

- Public realm and visitor experience improvements at the key destinations of Hanging Rock and Mount Macedon.
- Working with Traditional Owners to explore opportunities for low impact cultural based tourism experiences.
- Investment in cycle tracks and trails, in particular well-maintained formalised mountain biking and recreational / rail trails.
- Investment and enhancement of the network of walking trails.
- Creation of a Centre for Rare Arts and Forgotten Trades as a key tourism destination that consolidates the brand of 'makers' and supports local artisans and workshops.
- Development of educational experiences at the Lancefield megafauna site.
- Development of agritourism experiences, such as farm gate/wine trails, workshops and farm stays.
- Strengthening of Macedon Ranges Wines through experience and brand development.
- Development of food and beverage touring experiences.
- Investment in distilleries.
- Continued strengthening of the regionally significant events, and attraction of new events that stimulate visitation during off-peak times.
- Review of the Macedon Ranges Visitor Accommodation Opportunities Study 2010, to determine accommodation gaps and identify opportunity for future investment.

KEY CONSIDERATIONS FOR A SUSTAINABLE VISITOR ECONOMY IN THE MACEDON RANGES

1. **Sustainable tourism management.** It was widely identified throughout project consultation that sustainable tourism management is a primary consideration for the Macedon Ranges' community and businesses. Careful planning and management, including infrastructure improvements and visitor dispersal, will be required to ensure the values of the Macedon Ranges are protected, and that tourism benefits are realised by all community.
2. **A strengthening of the Macedon Ranges brand.** The unique attributes of Macedon Ranges will need to be reinforced and promoted to provide a stronger brand position and point of difference to other regions. The key strengths of makers, nature-based experiences, artisan villages, food, wine and beverage experiences, and close proximity to Melbourne will support the brand position.
3. **Increasing visitor yield.** The Macedon Ranges has a large proportion of its visitor base day tripping to the shire. This results in lower yield visitation when compared to other destinations such as Daylesford. Strategies to encourage overnight visitation, including packages and filling gaps in the accommodation offer should be considered.
4. **Investment in product, experiences and supporting infrastructure.** The Macedon Ranges has high quality tourism assets that drive visitation to the region. As visitor numbers increase, further investment will be required to improve the way visitors experience the region. An example of this is improved infrastructure at nature-based destinations, and investment in trails and visitor accommodation.
5. **Low weekday visitation.** Macedon Ranges has clear peaks in visitation that align with weekends and holiday periods, and low levels of weekday visitation. There is a need to explore product development and marketing that can attract weekday markets such as baby boomer retirees and international visitors.
6. **Connected and cohesive industry.** The visitor economy involves a wide range of industry stakeholders who need to work together as a strong and cohesive industry to deliver on the opportunities in this document. This includes collaboration between tourism businesses through to partnerships with regional and state tourism agencies.

7. **Facilitating investment.** Macedon Ranges Shire Council has one of the more complex planning systems to ensure the protection of the unique environment and attributes of the region. This was noted as a key barrier facing businesses wishing to develop tourism experiences. A review of local planning policy and development of clear decision guidelines for appropriate tourism experiences will provide greater clarity and confidence for tourism initiatives.

VISION FOR THE MACEDON RANGES VISITOR ECONOMY

The Macedon Ranges will be a favoured destination for escape and rejuvenation that is highly regarded for its quality nature-based attractions, artisan products, maker's culture and authentic experiences.

The strategy intends to set the long-term vision and strategic directions to support and grow the future visitor economy of the Macedon Ranges. Considered key to its success, the strategy aims to:

- Ensure growth of the visitor economy is appropriately managed to conserve the significant landscape, environmental and cultural values of the Macedon Ranges.
- Identify and prioritise opportunities that increase weekday visitation, length of stay, and encourage dispersal throughout the shire.
- Increase local employment and contribute to inclusive, healthy and vibrant communities.
- Build and grow the identity of the Macedon Ranges brand.
- Develop industry professionalism and achieve high level visitor satisfaction.

DIRECTIONS AND STRATEGIES

DIRECTION A PROMOTION AND BRAND AWARENESS

STRATEGY 1 Build awareness of the Macedon Ranges brand as a destination for authentic experiences, rejuvenation in nature, and maker's culture.

STRATEGY 2 Deliver visitor information services at all stages of the visitor journey to inspire and connect visitors to experiences.

DIRECTION B DEVELOPMENT OF PRODUCT STRENGTHS AND INVESTMENT IN EMERGING OPPORTUNITIES

STRATEGY 3 Enhance the quality and distribution of nature-based tourism experiences.

STRATEGY 4 Improve presentation and visitor amenity of artisan villages.

STRATEGY 5 Promote and develop quality food, wine and ferments experiences.

STRATEGY 6 Develop and grow the positive impacts of events and festivals.

STRATEGY 7 Support development of the emerging tourism products and experiences (weddings, Aboriginal cultural heritage experiences, wellness, mineral springs, agritourism and accommodation).

DIRECTION C ADVOCACY, INDUSTRY COLLABORATION AND BEST PRACTICE DELIVERY

STRATEGY 8 Improve industry professionalism and development.

STRATEGY 9 Advocate on behalf of the visitor economy and promote industry collaboration.

1. INTRODUCTION

1.1. BACKGROUND

The Macedon Ranges is located in central Victoria and forms part of the broader Daylesford and Macedon Ranges tourism region, which promotes its brand of 'wellness'. The potential and strength of the Macedon Ranges within the region is in the broader interpretation of wellness as health and relaxation, creativity, and the strong connection with nature and people.

Located less than an hour's drive from Melbourne, the Macedon Ranges is defined by its outdoor attractions and the natural beauty of Hanging Rock and Mount Macedon as well as the unique character of its heritage villages and local artisan culture.

In 2015/16, the Daylesford Macedon Tourism (DMT) Regional Tourism Board commenced the development of the region's first Destination Management Plan, which included a market research study and product development plan. This visitor economy strategy has considered this research and replaces the Macedon Ranges Tourism Industry Strategic Plan 2011.

1.2. THIS VISITOR ECONOMY STRATEGY

VISION

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- Build and grow the identity of the Macedon Ranges brand.
- Develop industry professionalism and achieve high level visitor satisfaction.

1.3. METHODOLOGY

The following methodology has been carried out to undertake this strategy:

- Literature Review (appendix A);
- Industry assessment;
- Consultation;
- Analysis of strategic context;
- Draft strategy; and
- Finalisation of strategy.

1.4. CONSULTATION PROCESS

This Strategy has been undertaken with extensive consultation with representatives from the Macedon Ranges tourism industry, local residents and Council departments.

This has included:

1. Review of issues raised during exhibition process of the document as named at the time: draft Macedon Ranges Visitor Economy Future Directions Paper 2017 – 2027.
2. Internal Council workshop.
3. Workshops with Project Reference Group.

4. Internal and industry stakeholder feedback.

1.5. DELIVERY OF STRATEGY

This strategy will be reviewed every three years or as required.

Each year an annual action plan will be developed to set out the activities and specific projects to be delivered to achieve the objectives of this strategy.

The Annual Action Plan will be developed in consultation with key stakeholders and the shire's peak tourism bodies, Daylesford Macedon Tourism Board and Tourism Macedon Ranges Inc.

At the end of each financial year the action plan will be reviewed and updated so that it is developed in line with Council's budget cycle, and the current conditions and emerging opportunities such as new funding streams and initiatives.

The action plan will be reported on following each annual review cycle.

1.6. RESPONSIBILITY AND PARTNERSHIPS

1.6.1. OVERVIEW OF ROLES AND RESPONSIBILITIES

Delivery of the Visitor Economy Strategy is the responsibility of many organisations. Macedon Ranges Shire Council has an important role to play, however a strong visitor destination is one where all organisations are actively engaged. Table 1 on the following page provides an outline of the various roles and responsibilities for national, state, regional and local organisations.

1.6.2. PARTNERSHIPS AND ALLIANCES

The Macedon Ranges core product is predominantly located along the Calder Highway, making it a 'gateway' to other popular regional destinations including Daylesford, Castlemaine and Bendigo. As part of the Daylesford and Macedon Ranges

Tourism Region, it is important that the Macedon Ranges works with its Regional Tourism Board to build on the regional brand and work together to explore opportunities to work collaboratively with neighbouring regions, especially Melbourne and Bendigo.

Importantly Macedon Ranges Shire Council should continue to develop its relationship and work collaboratively with its local organisations and associations: Tourism Macedon Ranges, Macedon Ranges Vignerons Association, Macedon Ranges Accommodation Association, Macedon Ranges Agribusiness Forum, the various business and tourism associations and other industry sector groups.

In the digital space, there is a need to work with online agencies such as TripAdvisor, Google and Airbnb, which have an increasingly important role in delivery of visitor information.

Strategic opportunities include:

- Continue to work with DMT to build the regional brand and support development of appropriate tourism product and experiences.
- Continue to support and work closely with Tourism Macedon Ranges (TMR) to build industry capacity, collaboration and advocacy.
- Explore opportunities to work with Bendigo region on the development of product, such as a food and beverage trails and art exhibitions.
- Embrace the use of online agencies that promote and provide information to visitors.
- Ensure a good relationship with Visit Victoria, Regional Development Victoria and Destination Melbourne, to identify and support initiatives to attract international and interstate visitors.
- Continue to work the Loddon Campaspe Regional Partnership to gain insights into community expectations and regional priorities.
- Work with Melbourne Convention Bureau on opportunities for involvement with the Corporate Incentive Programs.

TABLE 1 VISITOR ECONOMY ROLES AND RESPONSIBILITIES

KEY STAKEHOLDERS	MARKET RESEARCH	CAPITAL INVESTMENT IN TOURISM PRODUCT AND INFRASTRUCTURE	FUNDING	MARKETING INTRASTATE	MARKETING INTERSTATE	MARKETING OVERSEAS	PHYSICAL VISITOR INFORMATION SERVICES	DIGITAL VISITOR INFORMATION SERVICES	PRODUCT DEVELOPMENT AND ADVOCACY	RELATIONSHIP WITH MACEDON RANGES
National Level Organisation										
Tourism Australia	✓ ✓					✓ ✓		✓		This organisation does not normally deal directly with local government, however is a valuable source for market research including NVS/IVS.
Trade and Investment Commission		✓	✓ ✓							This organisation is responsible for funding programs for public and private tourism infrastructure. It is important for MRSC to track potential funding pools for projects.
State Level Organisation										
Regional Development Victoria		✓	✓ ✓						✓	Continue to work with RDV to access potential funding opportunities. This strategy will be an important reference for strategic alignment with state government.
Department of Environment Land Water and Planning		✓							✓	DELWP manages a number of public forest reserves and is working with Council and Traditional Owners on the Hanging Rock Strategic Plan. Continue to work together on product development opportunities.
Parks Victoria	✓	✓	✓	✓	✓	✓	✓	✓ ✓	✓ ✓	Parks Victoria manages a number of key state parks and reserves and a strong relationship is important for development and promotion of nature-based tourism.
Visit Victoria	✓		✓	✓	✓ ✓	✓ ✓		✓		Visit Victoria is a key partner in promotion and strategic planning for the tourism sector. Council should maintain a strong relationship to ensure alignment with Visit Victoria marketing initiatives.

Regional Level Organisation										
Daylesford Macedon Tourism	✓ ✓			✓ ✓	✓ ✓	✓		✓ ✓	✓	DMT is the Shire's regional tourism board and Council should continue to work collaboratively on product development, marketing, and promotional strategies.
Traditional Owners							✓	✓	✓ ✓	Council will maintain a close relationship with the three Traditional Owners - Dja Dja Wurrung, Taungurung and Wurundjeri – to explore potential for low impact cultural experiences and to ensure cultural values are respected and preserved.
Loddon Campaspe Regional Partnership		✓	✓						✓ ✓	MRSC is one of six municipalities of the Loddon Campaspe Regional Partnership. The Regional Partnership gathers insight into the expectations of our communities and provides advice to the Victorian Government on regional priorities.
Local Level Organisation										
Macedon Ranges Shire Council	✓	✓		✓	✓		✓ ✓	✓ ✓	✓ ✓	
Tourism Macedon Ranges [Industry]				✓					✓ ✓	Tourism Macedon Ranges Inc. is the peak tourism body for the shire. TMR will work with Council to ensure that issues and opportunities for collaboration are recognised and that the Annual Action Plan is developed and monitored in partnership.
Local Industry Associations ²									✓	The various tourism related associations work closely with Council to address industry and township challenges and identify opportunities for collaboration.
LEGEND	✓	Ancillary Role				✓ ✓	Primary Role			

² Local Industry Associations: Macedon Ranges Vignerons Association, Macedon Ranges Accommodation Association, Macedon Ranges Agribusiness Forum, Kyneton Business, Romsey Region Business and Tourism Association, Mt. Macedon and Macedon Business and Tourism Association, Business Kyneton.

2. STRATEGIC CONTEXT

2.1. KEY FINDINGS

The Visitor Economy Strategy must consider the changing nature of tourism as a result of continued globalisation, digital and technological improvements, the share economy and the needs of contemporary visitor markets.

As a result of substantial population growth and an increase in travel by domestic markets, visitation to regional Victoria continues to grow. Tourism Research Australia indicates that projected growth in domestic visitors is set to increase at a rate of 3% per annum, while international visitors are projected to grow at a rate of 5% per annum over the next seven years.

Being located only 45 minutes from Melbourne and with its attractive mix of tourism products and experiences means that Macedon Ranges will continue to be a popular destination to a range of domestic and international visitor markets.

Macedon Ranges needs to focus on sustainable tourism planning, to manage visitation impacts and attract the visitor markets aligned to its tourism experiences.

In order to attract the higher yield Lifestyle Leaders visitor markets there should be a strong focus on effective use of digital technology to provide motivational information and increase awareness of the region's unique tourism product and strengths. Continuous development of new and authentic experiences will also be required.

There is strong strategic direction that supports sustainable growth of tourism in Macedon Ranges, with the Victorian Visitor Economy Strategy highlighting the importance of the visitor economy to regional Victoria and the Daylesford Macedon Ranges region in particular.

2.2. TOURISM TRENDS

PROJECTED VISITATION GROWTH

Domestic tourism is expected to strengthen based on the continued population growth, low Australian dollar and steady economic growth. China is expected to be the largest source of growth in both inbound arrivals and inbound expenditure for Australia in the next decade, with estimations predicting it will generate 53 per cent of Victoria's total international expenditure in the year 2024-25 and contribute more than two thirds (70 per cent) of the forecast total international visitor expenditure growth over the next decade.

TABLE 2 DOMESTIC VISITOR NIGHTS IN REGIONAL VICTORIA BY PURPOSE OF VISIT FORECASTS 2014/15 – 2024/25

VISITOR NIGHTS (MILLION)	2014/15	2024/25	% AAG
Holiday	20.6m	28.6m	3.4% p.a
VFR	12.1m	15.2m	2.4% p.a
Business	4.5m	6.4m	3.6% p.a
Other	1.9m	2.4m	2.4% p.a
Total Regional Victoria	39.1m	52.7m*	3.0% p.a

Source: Tourism Research Australia Forecast Visitation to Victoria 2016 Issue (National and State). *Total Regional Victoria Visitation for 2024/25 not equal to visitation by purpose of visit type due to rounding.

The proximity to Melbourne and competitive strengths will continue to attract visitation, especially from the growing population of Melbourne. The passive nature-based experiences and agriculture and wine tourism present an opportunity for growing the Chinese visitor market.

TABLE 3 INTERNATIONAL VISITOR NIGHTS IN REGIONAL VICTORIA BY PURPOSE OF VISIT FORECASTS 2014/15 – 2024/25

VISITOR NIGHTS (MILLION)	2014/15	2024/25	% AAG
Holiday	2,456	4,122	5.3% p.a
VFR	2,039	3,870	6.6% p.a
<i>Business</i>	<i>173</i>	<i>159</i>	<i>-0.8%</i>
Other	1,698	2,189	2.6%
Total Regional Victoria	6,366	10,340	5.0%

Source: Tourism Research Australia Tourism Forecasts 2016 issue; figures for business purpose visitors are below reliable thresholds and should be interpreted with caution.

DIGITAL TECHNOLOGY

The overwhelming preference for visitor information is through online digital media. Social media and digital technology have profoundly changed the way that visitors research, plan, book, interpret and share their holiday experience. This will continue to evolve at a rapid pace and requires regular assessment of the way visitor information is delivered to ensure visitors are receiving the information they require. The role of the region's official tourism website visitmacedonranges.com is increasingly important for the delivery of visitor information and the continued development of engaging online content is vital.

The rise in use of digital technology has gone hand in hand with the decrease in walk in visitors to Visitor Information Centres across Victoria so the delivery of visitor servicing will need to be continually reviewed.

Staff, volunteer and industry training in digital technology is important to maintain strong visitor information delivery services across the Macedon Ranges.

THE SHARE ECONOMY

Related to an increased reliance on digital technologies and social media is the rise of the 'share economy'. Online platforms enable individuals to borrow or rent assets

owned by someone else. In Victoria, the share economy has had a significant impact on the tourism industry particularly in accommodation delivery through sites such as Airbnb and Stayz. These sites are linking visitors with new and diverse accommodation product changing the competitive landscape of the tourism industry.

Across regional Victoria anecdotal trends suggest that occupancy rates in hotels are particularly affected by the increase in online accommodation sharing. The share economy is in an emerging period and new exchanges are constantly being developed including bike sharing and private self-driving car sharing.

AUTHENTIC EXPERIENCES

Visitors are more regularly seeking out new and authentic ways to experience destinations, with a strong desire to connect to the people and places they are visiting. Increasingly visitors are researching the history and culture of the places they travel online. Recognising this trend, some regional towns are adopting new ways of recording and sharing oral histories and stories.

Experiences such as the Lost Trades Fair, food and art-based workshops, farmers markets and farm gate sales all provide direct connections with the makers and producers. In particular, the small-scale cellar doors of the Macedon Ranges provide intimate experiences, where visitors receive a personalised experience, taste new and exclusive wines and learn first-hand about the wines and the winemaker's story. Some wineries are only open to the public during events such as the annual Macedon Ranges Wine and Food 'Budburst' Festival, providing an exclusive visitor experience.

An emerging opportunity is the megafauna site at Lancefield, which has great potential to be developed as a unique educational visitor experience.

The release of the new mini-series Picnic at Hanging Rock has generated a renewed interest in Hanging Rock. Implementation of the Hanging Rock Strategic Plan should be prioritised to provide an enhanced visitor experience that includes an accurate account of the site as a place of Aboriginal cultural significance.

Victoria's Aboriginal Tourism Development Strategy 2013-23, identifies that there is a high demand for Aboriginal cultural heritage experiences, particularly from the western international markets of U.S.A and Europe. Aboriginal tourism is seen as a

motivator for travel to Australia for these visitors. The vision is that regional Victoria will boast a growing Aboriginal tourism industry that showcases Victoria's unique Aboriginal history, cultural expression and diversity to a global audience.

HOLISTIC APPROACH TO HEALTH AND WELLBEING

Health and wellness tourism has now become one of the biggest growth sectors of the travel industry. According to the US-based Global Wellness Institute, wellness tourism will continue to grow in popularity and is projected to grow by more than 9% per year, nearly 50% faster than overall global tourism. Wellness travel is becoming an increasingly valuable market around the world.

Australians are becoming increasingly conscience of staying fit and healthy. Their holiday choices are reflecting this trend with an increase in enquiries and bookings for fitness holidays, yoga breaks and weight loss retreats. Health and Fitness Travel, the leading specialists in wellness holidays worldwide, has seen demand more than triple since their launch in 2014 and predict an increase in active family adventures and leisure trips and mixing wellness with business for a better work-life balance.

The wellness brand of the Daylesford and Macedon Ranges tourism region is strongly aligned to this trend.

2.3. KEY POLICY AND STRATEGY

The Macedon Ranges Visitor Economy Strategy aligns with many state, regional and local government strategies and plans. The related strategies highlight the need for investment in wellness related infrastructure, arts, tracks and trails, and village amenity, whilst maintaining a sustainable approach to the environment and communities of the Macedon Ranges.

The key documents that have informed the strategy are discussed below.

Victorian Visitor Economy Strategy 2016, recognises the importance of the visitor economy to rural and regional Victoria, with the Daylesford and Macedon Ranges being highly dependent on tourism. The key aims of the strategy are:

- Facilitating investment in tourism product and services.

- A focus on regional Victoria across all activities.
- Marketing activity that leverages all major visitor segments.
- A wider calendar of events that encourages visitor dispersal across Victoria.
- Visitor experiences tailored to the preferences of visitors from Asia.
- Investing in key public infrastructure and roads.

Macedon Ranges Tourism Strategic Plan 2011, with key strategic directions being:

- Develop tourism industry professionalism and excellence.
- Remove barriers to growth and investment in the tourism sector.
- Improve tourism infrastructure.
- Foster a culture of cooperation within the industry.
- Develop tourism product building on competitive strengths and existing assets.
- Promote the Macedon Ranges to established and emerging markets through high quality information delivery and targeted marketing.

Macedon Ranges Environment Strategy is a dynamic strategy with the vision for Macedon Ranges to be a place where Council leads by example and works with the community to maximise improved environmental outcomes in all aspects of life.

Macedon Ranges Arts and Culture Strategy 2018 has the vision that Macedon Ranges has cultural experiences that delight, engage and challenge locals and visitors.

Relevant key goals of the strategy include:

- Connect our community by interpreting and celebrating our region's stories.
- Partnerships that inspire and support innovative arts and culture projects and activities.

Macedon Ranges Shire Council Plan (2017-2027) outlines the vision for the Macedon Ranges Shire Council, in partnership with the community to protect and enhance life across the Macedon Ranges.

This is supported by key priorities including to enhance the social and economic environment. The aim of this priority is to encourage economic vitality (tourism,

agribusiness, buy local, local employment options) and to attract strategic investment that is consistent with Council's vision. This will be achieved by:

- Increasing the opportunities for people to work locally.
- Enhancing the economic impact of tourism in a way that is consistent with Council's planning and environmental objectives.
- Attracting strategic investment that aligns with Council's vision.
- Identifying gaps in business diversity and encouraging new businesses.

Draft Macedon Ranges Statement of Planning Policy 2018

The Draft Macedon Ranges Statement of Planning Policy recognises the importance of Macedon Ranges Shire Council as a distinctive area and landscape to the local and Victorian community. It will become an incorporated document in the Macedon Ranges Planning Scheme.

The purpose of the Statement is to create a framework to ensure the outstanding landscapes, layers of settlement history, impressive landforms, and diverse natural environment of the Macedon Ranges are protected and conserved and continue to be of special significance to the people of Victoria.

The statement of planning policy highlights the following objective in relation to tourism:

- To provide for a diverse, sustainable range of recreational activities and a strong, resilient visitor economy.

The relevant strategies are:

- Support and facilitate sustainable and responsible tourism and recreation-related land uses and developments (such as agritourism) in keeping with the policy area's significant landscape, environmental and cultural values.
- Facilitate tourism-related land use and development that encourages people to recognise and understand Aboriginal and post-contact cultural heritage.

- Ensure the conservation and enhancement of Declared Water Supply Catchment Areas of regional or state significance in the planning of tourism and recreational land uses.
- Protect the unique rural character of towns of the declared area.

Macedon Ranges Walking and Cycling Strategy, 2014

This strategy aims to promote healthy lifestyles in the shire by providing access to shared trails.

Priority actions in the strategy include feasibility studies for a Hanging Rock to Woodend shared trail and a Gisborne to Riddells Creek off road shared trail.

The Campaspe River trail in Kyneton is also targeted for progressive upgrades.

Macedon Ranges Biodiversity Strategy, 2018.

The vision statement for the Macedon Ranges Biodiversity Strategy is:

"We have flourishing and connected communities of native plants and animals, plentiful and accessible natural places, and healthy and vibrant waterways across the Macedon Ranges".

The strategy recognises that the native vegetation and biodiversity directly supports the local economy, including tourism, and that some underutilised reserves present opportunities for nature-based tourism to engage and connect more people with nature.

Hanging Rock Strategic Plan, 2018

This plan recognises the importance of tourism and recreation objectives to reflect the broader role and significance of the precinct as achieved through key strategies:

- Manage sporting and recreational activities to reflect the role and significance of the Precinct.
- Support the continuing association of Hanging Rock as a place of gathering accessible to all visitors.
- Foster the tourism role of the Precinct in the region and state.

3. MACEDON RANGES VISITOR ECONOMY OVERVIEW

3.1. INTRODUCTION

The following provides an assessment of the visitor economy performance of the Macedon Ranges Local Government Area (LGA) and its tourism sub regions. It looks at visitation, visitor expenditure, and visitor profile and trends. The tourism sub regions (Figure 1), as defined in the Macedon Ranges Visitor Economy Impact Study 2017, align with the tourism geography of the Macedon Ranges Shire Council and include the following Statistical Area Level 2s (SA2)³:

- Kyneton – Malmesbury Sub Region (includes the SA2 of Kyneton);
- Woodend – Macedon Sub Region (includes the SA2s of Woodend and Macedon);
- Gisborne Sub Region (includes the SA2s of Gisborne and Riddells Creek); and
- Lancefield – Romsey Sub Region (includes the SA2 of Romsey).

The visitation and economic data in this section is primarily sourced from the Macedon Ranges Visitor Economy Impact Study, 2017, prepared by Urban Enterprise, which incorporates both domestic and international visitors.

This study draws on primary and secondary research including:

- Macedon Ranges Economic Impact Study 2009;
- Population and Visitor Estimator (PAVE) model;
- Australian Bureau of Statistics (ABS) data;
- National Visitor Survey (NVS); and
- Tourism Satellite Accounts (TSA)⁴.

³ Tourism Research Australia provides International Visitor Survey (IVS) and National Visitor Survey (NVS) data down to SA2 level.

⁴ A Satellite Account is a term developed by the United Nations to measure the size of economic sectors that are not defined as industries in national accounts. Tourism, for example is an amalgam of industries such as transportation, accommodation, food and beverage services, recreation and entertainment and travel agencies.

3.2. KEY FINDINGS

In 2016 Macedon Ranges attracted 1.67 million visitors, with over 1 million daytrip visitors and 654,000 overnight visitors. Macedon Ranges has grown 47% in overnight visitation, 74% in daytrip visitation and 62% in total visitation since 2009.

Visitation is concentrated predominantly to Kyneton and Woodend sub regions, which together attract 68% of total visitation to Macedon Ranges. This highlights that visitor dispersal towards the east of the shire should be a key consideration in order to strengthen business opportunities.

The visitor economy in Macedon Ranges contributes \$456 million in output and 2,355 jobs, making it one of the most important industry sectors for the region. The visitor economy directly supports the industry sectors of retail, food and beverage and accommodation, as well as providing in-direct benefit to a broad range of other service industries.

Importantly the visitor economy contributes significantly to the lifestyle of residents by providing local employment opportunities and a greater quantity and mix of retail businesses, quality cafes and restaurants, and experiences throughout the region.

Around 40% of Macedon Ranges shire residents who are employed, work in the shire⁵. This is a low job containment rate and means that the majority of residents are travelling outside the shire to other Melbourne municipalities for employment. The visitor economy is one of the few industries that has significant potential for jobs growth within the Macedon Ranges.

⁵ Census of Population and Housing, Australian Bureau of Statistics- Journey to Work (ABS), 2016

Visitation projections show that Macedon Ranges has the potential to attract an additional 1 million visitors by 2025 using a mid-point growth scenario. This highlights the need to develop strategies to ensure the sustainable growth of the visitor economy, where benefits are realised and potential impacts are mitigated. Improvements to infrastructure and development of new product will assist with effective management, while also enhancing the recreational opportunities of the local community.

Targeting lifestyle leader and independent international markets should be a focus for marketing efforts, as these markets are inclined to spend more and stay longer. Product development initiatives should focus on these markets to ensure the visitor experience aligns to their preferences.

3.3. ESTIMATED VISITATION

This section provides an overview of visitation to Macedon Ranges and its tourism sub regions as defined in this report.

3.3.1. VISITATION OVERVIEW 2009-2016

Table 4 provides an outline of visitation to the Macedon Ranges for 2009 and 2016.

In 2016 the Macedon Ranges attracted 1.67 million visitors, with over 1 million daytrip visitors and 654,000 overnight visitors.

Macedon Ranges has attracted significant growth in visitation since the preparation of the 2009 Tourism Economic Impact Study, growing 47% in overnight visitation, 74% in daytrip visitation and 62% in total visitation.

TABLE 4 VISITATION TO MACEDON RANGES SHIRE COUNCIL 2009 - 2016

	2009	2016	GROWTH 2009-2016
Overnight Visitation	446,461	654,106	47%
Daytrip Visitation	585,000	1,017,900	74%
TOTAL VISITATION	1,031,461	1,672,007*	62%

Source: Macedon Ranges Visitor Economy Impact Study 2017

TOTAL VISITATION BY SUBREGION

Table 5 provides an overview of total visitation to Macedon Ranges Sub Regions.

Woodend – Macedon Sub Region attracts 37% of all visitors to the Macedon Ranges, with 610,000 visitors in 2016. This is followed by Kyneton – Malmesbury which attracted 31% of visitation with 516,000 visitors.

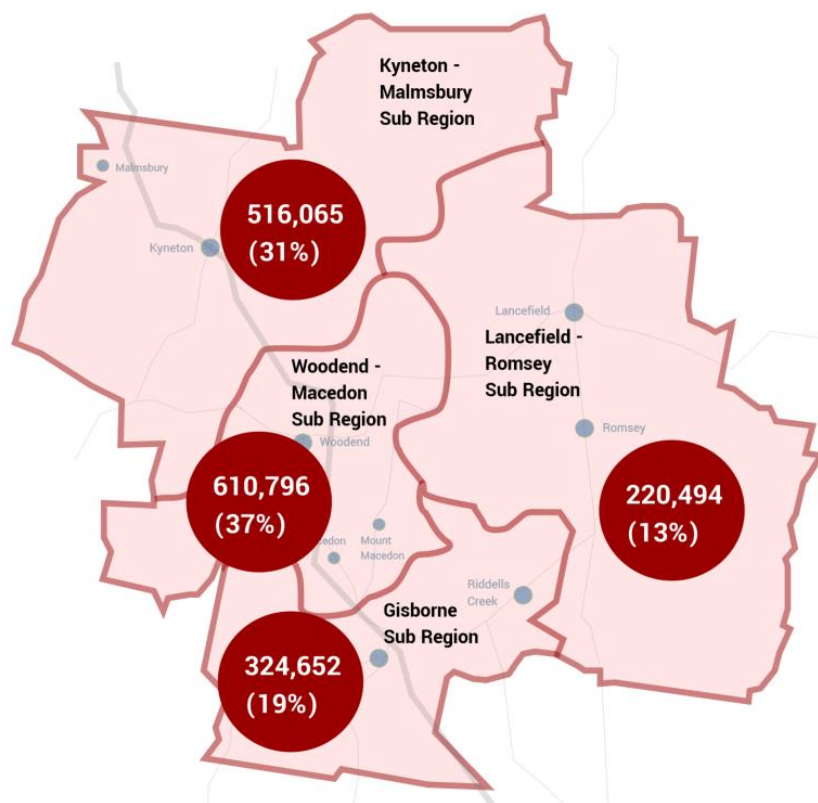
Romsey – Lancefield Sub Region has the lowest level visitation, attracting 220,000 visitors in 2016. This reflects the smaller population base and lower levels of tourism product in the Sub Region.

TABLE 5 TOTAL VISITATION

SUB REGION	2016	% OF TOTAL VISITATION
Romsey - Lancefield Sub Region	220,494	13%
Kyneton - Malmesbury Sub Region	516,065	31%
Woodend - Macedon Sub Region	610,796	37%
Gisborne - Sub Region	324,652	19%
TOTAL	1,672,007	100%

Source: Macedon Ranges Visitor Economy Impact Study 2017

FIGURE 1 TOTAL VISITORS AND PROPORTION OF TOTAL VISITATION BY TOURISM SUB REGION



Source: Macedon Ranges Visitor Economy Impact Study 2017

3.4. ECONOMIC IMPACT OF TOURISM

This section provides an estimate of the economic impact of tourism in the Macedon Ranges Shire Council and segments impacts down to the sub regional level.

Economic impact modelling has been developed from using direct expenditure by visitors and applying input-output modelling for flow on benefits, total output and jobs.

3.4.1. VISITOR EXPENDITURE

VISITOR EXPENDITURE 2009-2016

Table 6 provides an outline of visitor expenditure, comparing 2009 with 2016.

Total visitor expenditure in Macedon Ranges in 2016 was \$273 million, a 56% increase in visitor expenditure calculated in 2009.

TABLE 6 VISITOR EXPENDITURE 2009-2016

	2009	2016	GROWTH 2009-2016
OVERNIGHT VISITORS	\$135,000,000	\$201,464,942	49%
DAYTRIP VISITORS	\$40,000,000	\$72,270,900	81%
TOTAL VISITORS	\$175,000,000	\$273,735,842	56%

Source: Macedon Ranges Visitor Economy Impact Study 2017

VISITOR EXPENDITURE BY SUB REGION

Table 7 provides an outline of visitor expenditure by Sub Region.

Woodend – Macedon Sub Region attracts the highest level of visitor expenditure (\$92 million) of the Macedon Ranges Sub Regions, closely followed by Kyneton – Malmsbury (\$85 million).

TABLE 7 VISITOR EXPENDITURE BY SUB REGION

SUB REGION	TOTAL VISITOR EXPENDITURE	PROPORTION OF EXPENDITURE
Romsey - Lancefield Sub Region	\$41,809,823	15%
Kyneton - Malmsbury Sub Region	\$85,309,986	31%
Woodend - Macedon Sub Region	\$92,518,384	34%
Gisborne - Riddells Creek Sub Region	\$54,097,650	20%
TOTAL	\$273,735,842.24	100%

Source: Macedon Ranges Visitor Economy Impact Study 2017

3.4.2. ECONOMIC IMPACT OF TOURISM IN MACEDON RANGES

The economic impact of tourism in the Macedon Ranges is estimated \$456 million in regional output and 2,354 jobs (Table 8).

The value and jobs of the tourism industry in Macedon Ranges has grown 56% between 2009 and 2016.

TABLE 8 ECONOMIC IMPACT OF TOURISM IN MACEDON RANGES

	2009	2016
Direct Expenditure	\$175,000,000	\$273,735,842
Indirect Expenditure	\$117,000,000	\$183,011,963
Output	\$292,000,000	\$456,747,805
Total Jobs	1505	2,354
% GROWTH IN JOBS 2009-2016		56%

Source: Macedon Ranges Visitor Economy Impact Study 2017

3.4.3. BENCHMARKING OF THE TOURISM INDUSTRY

Table 9 provides a benchmark of the size of the tourism industry in terms of direct employment with other industry sectors in the Macedon Ranges. The data shows that the tourism industry is the second largest sector in terms of local jobs, behind the retail sector.

TABLE 9 TOURISM INDUSTRY BENCHMARKING

INDUSTRY DIVISION	JOB	% OF TOTAL
Retail Trade	1,509	14%
Tourism	1,413	13%
Health Care and Social Assistance	1,331	13%
Education and Training	1,234	12%
Construction	1,046	10%
Manufacturing	963	9%
Accommodation and Food Services	842	8%
Professional, Scientific and Technical Services	654	6%
Public Administration and Safety	632	6%
Agriculture, Forestry and Fishing	535	5%
Other Services	474	4%
Financial and Insurance Services	385	4%
Wholesale Trade	367	3%
Transport, Postal and Warehousing	330	3%
Arts and Recreation Services	318	3%
Administrative and Support Services	286	3%
Rental, Hiring and Real Estate Services	230	2%
Industry not classified	130	1%
Information Media and Telecommunications	94	1%
Electricity, Gas, Water and Waste Services	47	0%
Total	10,613	100%

Source: ABS Census, Tourism Satellite Accounts.

3.5. VISITOR MARKETS

3.5.1. EXISTING VISITOR PROFILE

The National and International Visitor Survey identifies the key characteristics and activities undertaken in the Macedon Ranges. The following provides an overview of current visitor profile.

- Daytrip visitors dominate the market.
- The VFR market is highly significant, representing a high proportion of international (62%) overnight (51%), and daytrip (33%) visitors.
- There is a lower proportion of holiday overnight visitors as compared to regional Victoria, which may be a result of the region's proximity to Melbourne.
- Overnight domestic and international travel is dominated by adults travelling alone or in couples.
- Older visitors/retirees were a key market segment across all three visitor markets (daytrip, overnight and international). This baby boomer market should be a target for weekday growth and they are generally high yield and are seeking authentic experiences.
- The Macedon Ranges nature-based offering was a key attractor with 'bushwalking'⁶ one of the top six activities for domestic visitors.
- The region attracted a high proportion of traditional western markets (UK, NZ and USA) and captured less of the emerging growth markets (such as China and India).
- Visitors whose purpose of visit was specifically 'holiday' were well represented in the daytrip market (46%) but underrepresented in the domestic overnight (24%) and international (17%) markets. Close proximity to Melbourne and gaps in the accommodation offer may have influenced this result.

⁶ 'Bushwalking / rainforest walks' is a predefined activity category within Tourism Research Australia's National Visitor Survey and International Visitor Survey results. There is no existing rainforest within the Macedon Ranges Region.

3.5.2. TARGET MARKETS

DOMESTIC VISITORS - LIFESTYLE LEADERS

The key domestic target market for the Macedon Ranges has been identified as the 'Lifestyle Leaders' market, as defined and targeted by Visit Victoria. Lifestyle Leaders is a psychographic segment - based on a mindset rather than a demographic - therefore they are found in all regions, ages and lifecycle groups and represent approximately a third of the Australian population aged 18+.

Lifestyle Leaders are educated, professional and progressive individuals who enjoy seeking out new information and being the first to try new products. They have a higher level of discretionary expenditure so they can afford to indulge more often in travel, with a particular desire to escape city life and embrace nature/outdoors and new discoveries. Compared with the average Australian, Lifestyle Leaders:

- Take a greater number of leisure trips per year (4.2 trips compared to 3.9).
- Spend more on travelling per year (\$4,058 on average compared to \$3,205).

The Lifestyle Leaders market segmentation model incorporates four categories of target markets specific to the types of experiences sought within the Lifestyle Leaders market, as outlined below.

CREATIVE OPINION LEADERS

Creative Opinion Leaders represent approximately 6% of the total population 18+. They are creative both in terms of their involvement in cultural and creative pursuits and their openness to risks, new experiences and new ideas. Their extensive social networks and extroverted nature means that once they've visited a destination, the latest exhibition or experience, they will generate positive word of mouth among their friends and family.

FOOD AND WINE LIFESTYLERS

Food and Wine Lifestylers represent approximately 13% of the total population 18+. They are a credible authority on eating out and seek to enhance their sophisticated palate and culinary knowledge through an understanding about everything food and wine. In particular they like to get to know the characters and stories behind the food and wine from the winemaker or chef.

ENRICHED WELLBEING

Enriched Wellbeing represent approximately 7% of the total population 18+. Enriched Wellbeing are progressive, educated and professional individuals who seek luxurious breaks to indulge personal passions within a culturally rich, natural or rejuvenating setting.

Enriched Wellbeing are financially secure, predominately female individuals who earn more and spend more on travel and luxury accommodation. They value quality over price and seek enrichment and rejuvenation through connecting with nature and focussing on their wellbeing. They appreciate quality and freshness in food and are more likely to buy organic foods, and indulge in premium restaurant experiences which offer fresh, seasonal and regional produce.

INSPIRED BY NATURE

Inspired by Nature represent approximately 14% of the total population 18+. They regularly get away for weekends and want a choice of activities that allow them to get active to varied degrees, from hiking and cycling to shopping and dining. Their genuine environmental concerns lead them towards preferring an eco-tourism experience where respect for natural surrounds is paramount.

INTERNATIONAL VISITORS - EXPERIENCE SEEKERS

International experience seekers are growing in number in Australia, particularly Asian experience seekers. The Asian markets are travelling further and dispersing more across Victoria, with motivations including interaction with nature, wildlife, heritage and culture.



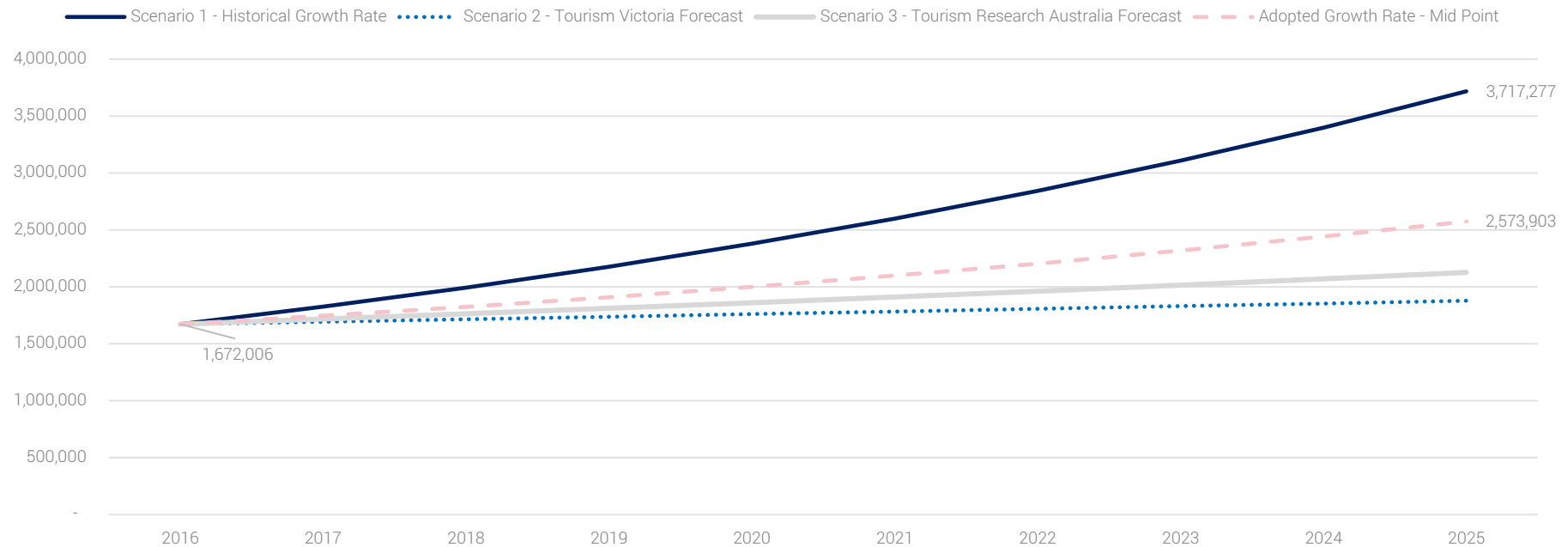
3.6. PROJECTED GROWTH

Figure 10 shows the forecast growth scenarios for the Macedon Ranges. This is based on historic growth rate and adopted Tourism Research Australia and Tourism Victoria forecasts.

All scenarios show that the Macedon Ranges will attract some level of visitation growth over the next 7 years.

Tourism by nature is a competitive industry and those destinations that attract new investment in compelling visitor product and develop successful marketing programs can greatly influence their future in terms of attracting visitation.

TABLE 10 PROJECT GROWTH SCENARIOS FOR THE MACEDON RANGES 2016-2025



4. PRODUCTS AND EXPERIENCES

4.1. INTRODUCTION

This section provides an overview of product strengths and experiences in the Macedon Ranges Shire Council and emerging product opportunities.

This analysis is based on audits of tourism products in Macedon Ranges and input from stakeholders and community through consultation.

Key strengths of the region include:

- Nature based tourism.
- Artisan villages.
- Food, wine and ferments.
- Festivals and events.

Much of the product that fits within the above categories of artisan villages, food, wine and ferments and festivals and events align with the overarching brand of 'makers'.

Areas for growth or emerging product include:

- Accommodation.
- Aboriginal cultural heritage experiences.
- Wellness and mineral springs.
- Weddings and conferences.
- Agritourism.

4.2. KEY FINDINGS

The Daylesford and Macedon Ranges tourism region promotes its brand of 'wellness'. The potential and strength of the Macedon Ranges within the region is in the broader interpretation of wellness as health and relaxation, creativity, and the strong connection with nature and people.

The iconic landmarks of Hanging Rock and Mount Macedon already attract large numbers of visitors and will require careful planning and investment in the future to ensure their sustainable management and enhancement of the visitor experience.

There are many other lesser known nature reserves, such as the Cobaw Ranges and Wombat State Forest that receive very little visitation and present an opportunity to improve the nature-based visitor experiences in these areas.

The Macedon Ranges is defined by the character of its historic artisan villages and townships connected by the overarching theme of the 'makers' - as defined by the creative arts, artisanal food, wine and agricultural products, and the increased popularity of workshops. The strong heritage values and townships of Kyneton and Woodend provide a strong motivator for visitation.

There are many successful established festival and events in the Macedon Ranges such as major concerts at Hanging Rock, Lost Trades Fair, Woodend Winter Arts Festival, Kyneton Daffodil & Arts Festival, Macedon Ranges Wine and Food, Budburst Festival and race days at Hanging Rock. In addition, Macedon Ranges is becoming a popular destination for weddings, leveraging from its high-quality wedding venues, beautiful scenery and strong food and wine credentials.

Cool climate wines are a key feature of the Macedon Ranges tourism product mix, with many wineries dispersed through the shire that offer intimate niche and authentic cellar door experiences.

Emerging product for the Macedon Ranges includes accommodation, Aboriginal cultural heritage experiences, wellness and mineral springs, weddings and agritourism.

Key opportunities for product and experience enhancement in Macedon Ranges include:

- Investment in cycle tracks and trails, in particular formalised quality mountain biking and off-road recreational / rail trails.
- Investment and enhancement of the network of walking trails.
- Public realm and visitor experience improvements at the key destinations of Hanging Rock and Mount Macedon.
- Promotional campaign to increase brand development and awareness of 'makers'.
- Creation of a Centre of Rare Arts and Forgotten Trades as a key tourism destination that consolidates the brand of 'makers' and supports local artisans and workshops.
- Development of educational experiences at the Lancefield megafauna site.
- Increase in agritourism experiences that complement existing farming practices, such as farm gate/wine trails, workshops and farm stays.
- Strengthening of Macedon Ranges Wines through experience and brand development.
- Food and beverage touring experience, including linking with adjoining shires.
- Investment in distilleries.
- Continued strengthening of the regionally significant events and procurement of new events that meet gaps in the event offer.
- Review of the Macedon Ranges Visitor Accommodation Opportunities Study 2010, to determine accommodation gaps and identify opportunity for future investment, e.g. camping.
- Work in partnership with Traditional Owners to explore opportunities for Aboriginal cultural tourism experiences and interpretation at culturally significant visitor nodes.



4.3. NATURE BASED TOURISM

A key strength of the Macedon Ranges nature-based visitor experience is the diversity of outdoor activities that are available in a variety of natural settings.

There are many opportunities for active recreation experiences such as bushwalking, trail running, cycling, rock-climbing and horse riding. The abundance of nature reserves, parks, gardens and rural landscapes support many passive recreation activities such as general sightseeing, birdwatching, visiting farms, educational tours (flora and fauna), photography and picnicking,. For children there are a variety of adventure playgrounds.

Hanging Rock is the major visitor destination in the Macedon Ranges. The rare volcanic formations are a majestic and inspiring scenic landscape. A site of Indigenous significance, Hanging Rock is on the edge of several tribal boundaries and is believed to be a shared place, which may have been used for gatherings. Hanging Rock is also currently host to international music concerts and popular horse races.

The implementation of the Hanging Rock Strategic Plan will guide the visitor experience enhancements at the site, with a strong objective of building visitor's knowledge and awareness about the importance of the Macedon Ranges to the Traditional Owners and recognising connection to country.

Mount Macedon and surrounds is the next most popular outdoor destination with the major attractions including the parks and gardens, walking trails and the Harbisons Picnic Area, tearooms and Memorial Cross (Victoria's most significant war memorial after the Shrine of Remembrance in Melbourne) on Mt Macedon. Peak visitation occurs for the Anzac Day memorial service and during the weeks in autumn when the autumnal colours are at their most vibrant.

Other outdoor destinations and experiences include:

- State Forests.
- Black Hill and Bald Hill Reserve.
- Upper Coliban, Lauriston and Malmsbury Reservoirs.
- Campaspe River Walk and Kyneton Town walk (Kyneton).

- Conglomerate Gully Walking Track (Riddells Creek).
- Five Mile Creek Walk (Woodend).
- Malmsbury Viaduct.
- Kyneton, Gisborne and Malmsbury Botanic Gardens.

Cycling is a growing strength across Victoria, and the Macedon Ranges has strong cycling credentials in both road and mountain biking. Along with a growing cycling community, it is becoming an increasingly popular destination for cycling events, noted for its scenic country roads and challenging climb of Mount Macedon.



The area around Lancefield is one of the most significant in Australia for megafauna fossils. Excavations reveal that giant wombats, or Diprotodon, as well as many other species of megafauna roamed the region until approximately 40,000 years ago. As identified in the DMT Product Development Plan, this is an emerging product opportunity.

CHALLENGES

- Visitor infrastructure at key tourism attractions such as Kyneton Mineral Springs and Hanging Rock are in need of renewal to provide a high-quality contemporary visitor experience.
- Limited awareness of the diversity of nature-based experiences available in the Macedon Ranges.
- Lack of awareness of the many walks around the Macedon Ranges, many of which are poorly developed and have limited signage.
- Lack of off-road recreational cycling trails.
- Wombat mountain bike offer needs to be improved if it is to compete with other destinations and attract visitors.
- Underdeveloped horse trail riding experiences, with lack of supporting infrastructure, e.g. formalised trail access and horse friendly car parking.
- Visitor congestion at Macedon and Mt Macedon during autumn.

OPPORTUNITIES

- Implementation of the Hanging Rock Strategic Plan to improve the visitor experience.
- Marketing and promotion to generate awareness of the nature-based products and experiences, including promotion of nature-based experiences to the emerging growth markets of China and India.
- Work with Parks Victoria, including involvement in master planning exercises, to develop visitor experiences and improve visitor facilities and accessibility at Mount Macedon.
- Investment in trails to increase the diversity and range of experiences, including:

- Improvement of mountain biking trails in appropriate locations, and promotion of links to Creswick and Harcourt trails.
- Progression of the Daylesford to Woodend rail trail.
- Progression of the townships shared-use trails projects.
- Strategic development of recommended short walks, including in Council managed bushland reserves - signage, trail head facilities and track improvements.
- Work in partnership with Parks Victoria to develop and promote the 18km Macedon Ranges Walking Trail loop.
- Consider opportunities to develop and promote accessible tourism experiences.
- Should the Victorian Environment Advisory Committee (VEAC) recommendations be adopted there is an opportunity to work with Parks Victoria to consider opportunities for nature-based activities through the development of park management plans.
- Increase number of businesses with bicycle friendly infrastructure and services.
- Update the Macedon Ranges Ride Guide and the Ride Macedon Ranges Strava Club.
- Consider opportunities for wellness practitioners to offer visitor experiences in parks and gardens.
- Development of educational experiences at the Lancefield megafauna site.
- Consider expansion of the wildlife walks, educational events and night tours offered by Council to appeal to school groups and young families.
- Development of the horse trail riding offer, including collaboration with Parks Victoria to develop the old scout area as a horse trail destination, with opportunity to extend this into surrounding areas managed by DELWP and HVP. Work with DELWP to develop horse trail riding opportunity in Cobaw Ranges.
- Continue to improve management measures for Honour Avenue, Macedon and Mount Macedon during autumn's high visitation period.
- Consider expansion of the Open Gardens program.
- Promotion of the children's adventure playgrounds: Romsey Ecotherapy Park, Kyneton Community Park and Woodend Children's Park.

- Improve car parking and traffic controls at key visitor nodes.
- Work with Parks Victoria on marketing and promotional campaigns, and options for their Licensed Tour Operators.

4.4. ARTISAN VILLAGES

The Macedon Ranges is defined by the many small artisan villages connected by their heritage values and strong focus on the handmade, arts, craft, and market foods. There is a significant number of professional artists working and living in the Macedon Ranges and the villages play an important role to collaborate, congregate and exhibit their works. The artistic sector is supported by a Council run arts and culture program that promotes cultural development in the region.

The cultural and heritage significance of the villages contributes to the unique character of the region. The villages each have a distinct past, and the heritage values and buildings contribute greatly to the visitor appeal.

The Daylesford Macedon Ranges Open Studios program and Macedon Ranges Art Trail contribute to the strong artistic identity of the Macedon Ranges, along with the growing number and popularity of workshops from the culinary to creative that entice visitors to extend their stay and learn new skills.

CHALLENGES

- Some village streetscapes require enhancement to improve visitor amenity.
- There are limited hours of trading in village shops, particularly aligning with Saturday afternoon and Sunday visitation.
- Limited bicycle parking to encourage exploring townships by bike.

OPPORTUNITIES

- Streetscaping to improve visitor amenity, accessibility and attractiveness of villages.
- Public art programs and other activities to increase the visibility of the creative industries.

- Support more artists to join the Daylesford Macedon Ranges Open Studios and Macedon Ranges Art Trail to create a stronger network of local makers.
- Develop and promote the 'makers' theme including expansion of the program of workshops.
- Promotion and interpretation of the heritage values through online media and interpretive signage at key nodes.
- Enhance the artisanal character of village streets by encouraging shop owners to display local art and sculpture.
- Incentives to encourage village shops to remain open during peak visitation times, e.g. Christmas trading.
- Promotion of the Kyneton Museum and consideration of broader opportunities at the site, such as a Makers Market.

4.5. FOOD, WINE AND FERMENTS

Food and beverage is a growing strength of the region, with an abundance of quality providers, producers, farm gates, farmers markets, fine dining restaurants, distilleries and wineries.

Macedon Ranges is the coolest wine region on the Australian mainland and the Macedon Ranges Wines brand has a growing reputation for high quality, small-batch wines being driven by a passionate group of established and new-age vignerons. The quality wines are matched by highly authentic cellar door experiences, where it is more often than not the wine maker providing the tasting.

The established landmark of Holgate Brewery, one of Victoria's pioneering micro-breweries, is now being complemented by a number of small distilleries producing unique and award-winning gins.

The number of quality food producers is also growing rapidly, and the Macedon Ranges is on the cusp of being a widely-recognised foodie brand.

CHALLENGES

- It is difficult for many primary producers to offer viable farm gate experiences due to regulatory barriers, limiting the opportunity to establish farm gate trails.
- Promotional and packaging opportunities are being missed as not all restaurants, outlets and accommodation providers are showcasing local wine or produce.
- There is limited awareness of the Macedon Ranges Wines brand, and lack of a destination restaurant to put Macedon Ranges on the food and wine map.
- Planning regulations can be a limiting factor in the development of the wine industry and cellar doors.

OPPORTUNITIES

- Strategic marketing with the Macedon Ranges Vignerons Association to build brand awareness of the Macedon Ranges Wines.
- Participation in regional food and wine festivals and the Melbourne Food and Wine Festival.
- Establish a Macedon Ranges produce brand.
- Improved networking and cross-promotion between local wineries, restaurants and accommodation providers.
- Promote regional produce outlets in each township to showcase the diverse food and wine in the region.
- Food and wine exhibits at visitor information centres.
- Consider use of local product sampler baskets to encourage exploration and visitation in the region.
- Collaborate with surrounding shires and regional tourism boards to establish food and beverage touring routes, e.g. craft beer, gin or whisky.
- Further develop the region's culinary events, such as the Macedon Ranges Wine and Food, Budburst Festival and farmers' markets.
- Establish clear guidelines on planning controls and processes relevant to the food and wine industry to educate on possibilities for development.

- Consider opportunities to develop a Macedon Ranges Farm Gate Trail(s).



4.6. FESTIVALS AND EVENTS

The concerts held at Hanging Rock and large events such as the Lost Trades Fair are a major contributor to the visitor economy in the Macedon Ranges. Lost Trades in particular provides significant economic benefit and is the cornerstone of the Macedon Ranges' brand of 'makers' and year-round calendar of small artisanal workshops.

The regular schedule of smaller festivals and events including farmers' markets, open gardens, art exhibitions, workshops, theatre and concerts provide year-round attraction for visitors and contribute greatly to the local cultural identity and character of the Macedon Ranges. The Macedon Ranges Sustainable Living Festival is a growing event strongly aligned with the sustainability and environmental protection principles of the Macedon Ranges. There is opportunity to grow and promote this event as part of the Macedon Ranges brand positioning.

CHALLENGES

- Limited accommodation options, especially free or low-cost campsites, reduces opportunity for people to stay overnight when visiting for major events.
- There is no event database or promotional platform that captures all events happening throughout the shire.
- No booking platform that lists all accommodation in the Macedon Ranges.
- The costs and administrative process for obtaining a Place of Assembly permit (as required by some events), can impact the viability for smaller, one-off events.
- Process and information for event bookings in public parks and reserves is not always consistent.
- Limited venues in the shire to accommodate large events.
- No prospectus or strategy to attract new events.

OPPORTUNITIES

- Establish a temporary campground during major events may encourage people to stay and explore the region.
- Make enhancements to the Visit Macedon Ranges website's 'What's On' page and promote as the shire's primary events database.
- Review the application of Place of Assembly to consider how it is interpreted and administered, and whether there exists an opportunity to create a local assessment criteria to make it less of a barrier to certain small events.
- Promotion of the Shire's small halls as venues available for events, weddings and private functions.
- Encourage businesses to create packages linking accommodation, transport and food and beverage with the events program.
- Look at opportunities to create packages to promote the region and encourage repeat visitation.
- Develop a new Events Strategy to guide the future direction for events and festivals in the shire.
- Continue concerts and events at Hanging Rock, and look to expand the range of arts and cultural events.
- Consider options to support significant regional events to ensure their ongoing development and success.
- Work to support and compliment actions of Council's Arts and Culture Strategy to grow the success of events.
- Continue to improve event planning guidelines and processes and actively work with festival and event organisers to guide them through the planning process.
- Encourage membership to Business Events Victoria, Victoria's peak body for business event attraction, to ensure that opportunities for business event attraction are maximised.
- Develop a clear and consistent process for booking weddings and other private events in public parks and reserves.
- Create an autumn in the Macedon Ranges festival that supports small events and promotes the shire.

4.7. ACCOMMODATION

Accommodation in the Macedon Ranges is predominantly a mix of self-contained bespoke cottages, B&Bs, guesthouses and country retreats. This is supplemented by some smaller hotels and a caravan park.

The Visitor Accommodation Opportunities Study 2010, identified the following gaps in the accommodation market:

- A high-quality self-contained eco-cabin establishment.
- A caravan / tourist park with powered and unpowered sites and a mix of two and three-bedroom cabins.
- A medium sized motel or serviced apartment facility.
- Farm stay and winery accommodation.

CHALLENGES

- The Macedon Ranges is lacking the range of high end accommodation to attract some high-yield and international market segments, e.g. five star hotel.
- Although Macedon Ranges has Recreational Vehicle (RV) friendly facilities, there is limited opportunity for overnight camping and caravanning. This limits the availability of this type accommodation often favoured by families, grey nomads and adventurous travellers.
- Low weekday occupancy is a challenge to the viability of many accommodation providers.
- Concern in the accommodation industry that Airbnb is attracting new accommodation listings into the market place who may not be aware of, or compliant with regulations.

OPPORTUNITIES

- Undertake a review of the Macedon Ranges Visitor Accommodation Opportunities Study 2010, to determine accommodation gaps and identify opportunity for future investment.

- Investigate options for temporary camping/glamping accommodation solutions to service events and peak times.
- Investigate options for accommodation in the Farm Zone to support diversification and sustainability of the farming sector.
- Consider expanding the RV friendly towns program to encourage dispersal across the Macedon Ranges. This would also target the grey nomads market, which could encourage an increase in weekday visitation.

4.8. ABORIGINAL CULTURAL HERITAGE EXPERIENCES

Aboriginal people have lived in the Macedon Ranges area for at least 26,000 years. The Wurundjeri, Dja Dja Wurrung and Taungurung communities are still active and indications of indigenous heritage can be found in the form of scarred trees, artifact scatters, shell middens, quarries, grinding stones, ceremonial grounds and ochre pits throughout the Macedon Ranges.

Wil-im-ee Mooring (Mount William), north of Lancefield, is one of the most important cultural sites of the Wurundjeri people, famous throughout south-eastern Australia as the source of the highly-valued greenstone hatchet heads. In 1917 the site was described in the Victorian Parliament as, 'the greatest historic landmark of Australia,' for its significance as proof that the land had been inhabited pre European settlement. It was recently added to the National Heritage List in recognition of its national significance. The site is currently not serviced for large visitor numbers and is currently not open to the general public.

Other identified places of particular Aboriginal cultural heritage significance include Hanging Rock, Black Hill and Malmsbury, which have been recognised by local communities for their sacred significance.

CHALLENGES

- There is currently poor interpretive information for Aboriginal cultural heritage at major tourism attractions.

- Interpretive information at Hanging Rock lacks the factual history of Hanging Rock as a site of significance for the three aboriginal communities: Wurundjeri, Dja Dja Wurrung and Taungurung.

OPPORTUNITIES

- Explore opportunities for tourism partnerships and experiences as part of the development of the Macedon Ranges Reconciliation Strategy.
- Work in partnership with Traditional Owners to explore opportunities for cultural heritage experiences and interpretation at culturally significant visitor nodes.
- Work with the Wurundjeri Tribe Council to investigate opportunities for Aboriginal cultural heritage experiences at Wil-im-ee Mooring (Mount William).
- Work with Taungurung Land and Waters Council to investigate opportunities for Aboriginal cultural heritages experiences in the Kyneton area, which is rich in Taungurung Aboriginal history and significant sites.

4.9. WELLNESS AND MINERAL SPRINGS

Over 80 per cent of the state's reserves of mineral water are contained within the region, and as a gateway to the Daylesford Hepburn spa region there is great potential to develop the spa and mineral springs product offer.

CHALLENGES

- The Macedon Ranges has limited spa or wellness product to align with the broader regional brand.
- The Kyneton Mineral Springs is the most accessible in the Macedon Ranges, however there is very little in the way of visitor product or experience.

OPPORTUNITIES

- Encourage investment proposals at the Kyneton Mineral Springs to provide an improved visitor experience.
- Support development of a destination health and wellness retreat.

- Support wellness practitioners to develop their product.

4.10. WEDDINGS AND CONFERENCES

Weddings and conferences play a key role in attracting visitors to the region. They are particularly beneficial to the visitor economy as they generate high visitor yield by encouraging overnight visitation, including weekday stays for conferences. They also provide an opportunity to showcase local product and encourage repeat visitation.

CHALLENGES

- There is limited promotion of the region as an option for the Melbourne wedding market.
- Growth of wedding and conference sector limited by lack of venues and accommodation.

OPPORTUNITIES

- Identify and promote all wedding venues in the shire, including niche venues such as community halls, wineries, parks and gardens.
- Incorporate the wedding offer into the marketing strategy and work with DMT on regional marketing campaigns.
- Promote the region as a destination for the Melbourne weddings market, including at trade fairs and expos.
- Provide support for new businesses entering the wedding market.

4.11. AGRITOURISM

Agritourism is strongly aligned with the Macedon Ranges brand and growing reputation for ethical agribusiness. It is supported in the Council Plan and Draft Statement of Planning Policy as an area of sustainable and responsible tourism that contributes to the Shire's economic vitality.

The Macedon Ranges has an increasing number of 'new generation' farmers bringing innovation to the farming sector, including artisan flower farming and hemp production. These artisanal producers are seeking to diversify and connect to the visitor economy with tourism experiences that improve the economic viability of these small enterprises and build resilience into the agricultural sector into the future.

There exist many opportunities for innovative growth of this sector including tourism experiences such as open days, workshops, farm gate sales, experiential and immersive getaways, accommodation and weddings.

CHALLENGES

- The rural zones (Farming Zone and Rural Conservation Zones) are restrictive and do not consider modern farming practices or opportunity for innovative tourism related activities.
- All events/workshops are currently interpreted as Place of Assembly and achieving the permit is both onerous and costly.

OPPORTUNITIES

- Identify current policy issues and potential solutions through Council's review of the Farming Zone and Rural Conservation Zone.
- Consider an amendment to the Macedon Ranges Planning Scheme to include guidelines on the appropriate location and design for tourism uses in rural areas of the Shire.

4.12. FACILITATING INVESTMENT

The Macedon Ranges has one of the more complex planning systems to ensure the protection of the unique environment and attributes of the region. This was noted as a key issue facing businesses wishing to develop tourism product.

There are a number of product opportunities that are identified in this report that require both private and public sector investment to be realised. Clear guidelines and

a facilitative environment will build confidence and assist appropriate business development.

Strategic considerations for facilitating investment include:

- Review local planning policies related to tourism and consider amendments that provide clearer tourism objectives and decision guidelines for appropriate tourism experiences aligned with this strategy.
- Provide improved Council support and information to guide applicants through the planning process.

5. VISITOR INFORMATION AND PROMOTION

5.1. INTRODUCTION

This section of the report provides an overview of considerations for visitor information services and promotion.

5.2. KEY FINDINGS

Visitor information and promotion is a key consideration of this strategy given that social media and digital technology have profoundly changed the way that visitors learn, research, plan, book, interpret and share their holiday experience.

There is a need to review the approach to visitor information services in Macedon Ranges and in particular review the role of physical visitor information centres.

The marketing strategy should focus on developing the unique Macedon Ranges brand, and target the lifestyle leaders and international experience seekers market segments.

Other key considerations for marketing Macedon Ranges include:

- **Strengthen the Macedon Ranges brand with particular focus on its nature-based and 'makers' credentials.**
- **Building awareness of product strengths and experiences while leveraging on the iconic attractions of Hanging Rock and Mount Macedon.**
- **Ongoing resourcing for development of engaging and dynamic content shared through all streams of digital and social media.**
- **Improvement in cross promotion between businesses and surrounding shires.**
- **Development of thematic marketing materials and itineraries that targets niche areas of interest.**

- **Continue to strategically assess the provision of visitor information services to meet future need and align with consumer demand and trends.**

5.3. VISITOR SERVICING

Visitor servicing at all stages of the visitor journey remain relevant, but no more so than through digital and social media channels. The shire's official tourism website visitmacedonranges.com and social media streams will become increasingly important and will require increased resourcing to reach target audiences and remain relevant.

Staff, volunteer and industry training in digital technology will be important to, as will be working with DMT and Visit Victoria to ensure digital assets are developed in collaboration to remove fragmentation and provide a consistent digital information experience.

The rise in use of digital technology has gone hand in hand with the decrease in walk in visitors to Visitor Information Centres across Victoria, and at the time of this document the visitor servicing model is being reviewed both at state and local government level.

There is considerable importance in defining the role of Visit Victoria, DMT and Council in marketing the products across the Macedon Ranges. There is a need for a high-level strategic marketing plan that assesses and defines these priorities and actions.

Visitability refers to the level of infrastructure and services provided to support the visitor experience. The Macedon Ranges has strong visitability credentials with a good freeway and rail network linking to Melbourne for the western villages and also provision of a network of visitor information services. There is however a need for further strategic assets to support visitation, which are explored below.

Strategic considerations to improve visitability include:

- Review of visitor information services with a focus on improving the visitor information centre experience.

- Public transport is limited in some parts of the shire and there are no public transport links to the key destinations of Hanging Rock and Mount Macedon. Council would play a key advocacy role for delivery of such transport service.
- The quality and availability of public toilets affects the visitor experience. A review of public toilets should be considered.
- Visitors have an increasing expectation of consistent network coverage while traveling. Council should continue to advocate for improvement to mobile and NBN blackspots.
- Marketing campaigns aimed at the international and baby boomer markets to stimulate weekday and off season visitation.
- Regular promotions to showcase local business.
- Continue to develop themed itineraries and experiences, including a Macedon Ranges short walks guide.
- Ensure signage at Council managed bushland reserves is a consistent high quality.

5.4. MARKETING

There are many regions around Melbourne that offer competing visitor experiences focused on food and wine, art and crafts, and the outdoors. Many of these regions have more sophisticated visitor experiences and product. The Yarra Valley and Mornington Peninsula have developed significantly over the past 10 years and the spa and wellness branding of the Daylesford and Macedon Ranges region is no longer the key competitive advantage it used to be.

Marketing is vitally important to the Macedon Ranges tourism industry and it is critical that the Macedon Ranges has clear messaging to its target market and establishes a point of difference over other regions close to Melbourne.

Strategic considerations for marketing include:

- Work with DMT to develop and build a strong brand awareness built around the theme of 'makers' and nature-based experiences.
- Product awareness amongst visitors is generally low. There are many opportunities to improve the awareness of outdoor experiences, food and wine, and workshops.
- Continue to develop and enhance the performance of visitmacedonranges.com as the Shire's official tourism website, and encourage industry participation for PR opportunities and listing of events.
- Build product and brand awareness through dedicated social media campaigns.
- Actively promote to residents to increase activity by locals and the VFR market.

6. STRATEGIC DIRECTIONS

6.1. INTRODUCTION

This section of the report summarises the key strategic considerations based on the product strengths, issues and opportunities identified throughout the report. It then provides the priority directions and their associated objectives from which the action plan is developed.

Key strategic considerations for Macedon Ranges Visitor Economy include:

1. **Sustainable tourism management.** It is widely identified throughout project consultation that sustainable tourism management is a key consideration for the Macedon Ranges community and businesses. This means that infrastructure needs to be improved in key locations to support peak visitation and that visitors are encouraged to disperse from key destinations across the shire to provide them with a more engaging and rounded experience of the Macedon Ranges offer.
2. **A strengthening of the Macedon Ranges brand.** The key brand attributes for Macedon Ranges need to be reinforced through all marketing, social media and visitor services. This includes a focus on makers, nature based experiences close to Melbourne, artisan villages and food, wine and beer experiences.
3. **Growth in yield.** Macedon Ranges Shire Council has a large proportion of its visitor base day tripping to the shire. This results in lower yield visitation when compared to other destinations such as Daylesford. Proximity to Melbourne and gaps in the accommodation offer is a major reason for the low level of overnight visitation.
4. **Investment in product, experiences and supporting infrastructure.** The Macedon Ranges has high quality tourism assets and villages that drive visitation to the region. There is however a need for further investment in these assets to improve the way visitors experience the region. An example of this is improved infrastructure at nature-based assets, investment in tracks and trails and visitor accommodation.
5. **Low weekday visitation.** Macedon Ranges has clear peaks in visitation that align with weekends and holiday periods and low levels of weekday visitation. There is a need to explore product development and marketing that can attract weekday markets such as baby boomer retirees and international visitors.
6. **Connected and cohesive industry.** Delivery of tourism product development in Macedon Ranges needs to consider the wide range of stakeholders required to create a strong and cohesive industry. This includes tourism industry members who collaborate and communicate, partnerships with RTB's and alignment with Visit Victoria marketing opportunities.
7. **Facilitating investment.** The Macedon Ranges Shire Council has one of the more complex planning systems to ensure the protection of the unique environment and attributes of the region. This was noted as a key issue facing businesses wishing to develop tourism product. Clear guidelines and a facilitative environment will assist business development.

6.2. DIRECTION A: PROMOTION AND BRAND AWARENESS

Analysis of the product and experience offer of the Macedon Ranges highlights that the overarching competitive advantage of the region is in 'makers' and 'nature based tourism'.

Makers is an overarching term for the artisan food, wine, produce and art delivered across the Macedon Ranges. The makers theme is strengthened by the region's most significant event, the Lost Trades Fair, and the growing popularity of artisan workshops.

Nature and the outdoors is one of the key motivators to visit the region, buoyed by the iconic landmarks of Hanging Rock and Mount Macedon that will continue to drive tourism to the region. There are many other opportunities including other nature reserves, parks and gardens that need to be promoted through marketing and visitor information services.

Improved destination marketing and product awareness will assist in encouraging visitor dispersal and growing yield.

STRATEGY 1 **Build awareness of the Macedon Ranges brand as a destination for authentic experiences, rejuvenation in nature, and makers' culture.**

STRATEGY 2 **Deliver visitor information services at all stages of the visitor journey to inspire and connect visitors to experiences.**

6.3. DIRECTION B: DEVELOPMENT OF PRODUCT STRENGTHS AND INVESTMENT IN EMERGING OPPORTUNITIES

The Macedon Ranges has product strengths in nature-based tourism, food, wine and ferments and festivals and events. It also has emerging tourism products of weddings, Aboriginal cultural heritage experiences, wellness, mineral springs and visitor accommodation.

Enhancement of products and experiences is the responsibility of both public and private sectors.

STRATEGY 3 **Enhance the quality and distribution of nature-based tourism experiences.**

STRATEGY 4 **Improve presentation and visitor amenity of artisan villages.**

STRATEGY 5 **Promote and develop quality food, wine and ferments experiences.**

STRATEGY 6 **Develop and grow the positive impacts of events and festivals.**

STRATEGY 7 **Support development of the emerging tourism products and experiences (weddings, Aboriginal cultural heritage experiences, wellness, mineral springs, agritourism and accommodation).**

6.4. DIRECTION C: ADVOCACY, INDUSTRY COLLABORATION AND BEST PRACTICE DELIVERY

A strong and cohesive industry is critical for the creation of a visitor friendly destination. Collaboration amongst industry improves the opportunity for businesses to refer and market complementary products and experiences, which can lead to improved visitor yield.

There is a need to continue with network development and training of the tourism industry, and to leverage from existing knowledge to build a strong and connected industry.

Furthermore, there are collaborative marketing opportunities that can be explored. Strong relationships with industry partners including DMT, Visit Victoria and local industry associations will assist in effective communication and marketing of the region's strengths and creation of clear messaging.

STRATEGY 8 **Improve industry professionalism and development.**

STRATEGY 9 **Advocate on behalf of the visitor economy and promote industry collaboration.**

6.5. PRIORITIES

The Visitor Economy Reference Group has highlighted the following as key priorities for delivery within the Macedon Ranges Visitor Economy Strategy. Implementation of these projects should be considered within the annual action plan.

INVESTMENT PROJECTS

Investment projects that are supported as priorities by the Macedon Ranges Visitor Economy Reference Group are identified below. These include a mix of both private and public sector investment for delivery:

- Enhancement of the visitor experience at Hanging Rock, to be recognised as a world-class visitor destination featuring Aboriginal cultural heritage experiences and interpretation.

- Investigate options for the Centre for Rare Arts and Forgotten Trades.
- Deliver the Daylesford to Woodend Rail Trail.
- Consider development and investment for Kyneton Mineral Springs.

SHORT TERM PROJECTS

Other priority short term projects that do not require substantial levels of approvals and investment, however will require some resources for delivery including the following:

- Reinforce the makers and nature-based brand of Macedon Ranges with up to date promotional materials.
- Investigate opportunities to further develop the region's culinary events, such as Macedon Ranges Wine and Food, Budburst Festival, farmers' markets and encourage participation in the Melbourne Food and Wine Festival.
- Advocate on behalf of the visitor economy to build awareness of its broader benefits to the local community, and promote industry collaboration through networking, engagement and communication.
- Continue to provide support and develop clear guidelines to assist tourism businesses navigate the planning process.
- Product packaging for domestic and international operators.
- Farm gate trail (food, wine, cider, beer, distillery, flowers, hemp).
- Garden path trails (open gardens, botanic gardens, parks, nurseries and all things horticultural).
- Review the Macedon Ranges Visitor Accommodation Opportunities Study 2010 to determine relevance and accommodation opportunities.
- Develop regional conference market by tapping into existing product in the east corridor.
- Boost the region's profile as a destination for country weddings.

7. ACTION PLAN

PROJECT TITLE	LEAD	OTHER STAKEHOLDERS	TIMEFRAME (YEAR)
DIRECTION A DIRECTION A: PROMOTION AND BRAND AWARENESS			
STRATEGY 1 Build awareness of the Macedon Ranges brand as a destination for authentic experiences, rejuvenation in nature, and maker's culture.			
ACTION 1.1 Continue working collaboratively with Daylesford Macedon Tourism and Visit Victoria to grow brand awareness.	MRSC DMT	Visit Victoria	Ongoing
ACTION 1.2 Enhance functionality and promotion of the 'what's on' page to be the comprehensive register of all events and festivals in the shire. <ul style="list-style-type: none"> Update and further develop website to increase visitor engagement, including blog, visitor newsletters, and itineraries. Develop the 'what's on' page better promote and list all events and festivals. 	MRSC	DMT	Short Term
ACTION 1.3 Develop marketing strategies to promote local businesses and events, disperse visitors, and encourage visitation during off-peak times.	MRSC	DMT	Short Term
ACTION 1.4 Expand use of social media to build brand awareness and encourage visitors to website.	MRSC	DMT	Short Term
STRATEGY 2 Deliver visitor information services at all stages of the visitor journey to inspire and connect visitors to experiences.			
ACTION 2.1 Continue to produce and update the Official Visitor Map, Ride Guide and Visitor Guide.	MRSC	DMT	Short Term

ACTION 2.2	Undertake a visitor information services review with a particular focus on the Visitor Information Centres.	MRSC	DMT	Short Term
ACTION 2.3	Complete an audit of tourism and wayfinding signage and develop signage strategy.	MRSC	DMT	Short Term
DIRECTION B DEVELOPMENT OF PRODUCT STRENGTHS AND INVESTMENT IN EMERGING OPPORTUNITIES				
STRATEGY 3	Enhance the quality and distribution of nature-based tourism experiences.			
ACTION 3.1	Promote and expand the diversity of nature-based experiences. <ul style="list-style-type: none"> Maintain quality information for outdoor activities (hiking, horse riding and cycling). Audit all reserves and trails to create a comprehensive list of nature-based experiences. Develop a parks, gardens and short walks brochure. 	MRSC	Parks Victoria DELWP	Ongoing
ACTION 3.2	Enhance the visitor experience at Council's bushland reserves. <ul style="list-style-type: none"> Continue to implement Council's bushland reserve environmental management plans. Continue Council's program of nature tours, events and walks. Install consistent place identification, interpretive signs and passive recreation infrastructure in Council managed bushland reserves. 	MRSC		Medium
ACTION 3.3	Enhancement of open gardens program.	MRSC	Mount Macedon & District Horticultural Society	Medium Term
ACTION 3.4	Extend and enhance the mountain biking offer. <ul style="list-style-type: none"> Undertake options and feasibility study for enhancement to the MTB network. 	MRSC Gisborne and Wombat Mountain Bike Clubs Parks Victoria	DELWP	Short Term
ACTION 3.5	Grow the Macedon Ranges as a key cycling destination. <ul style="list-style-type: none"> Work with Cycling Victoria and event organisers to increase the number of cycling events. Continue to develop the Macedon Ranges Ride Guide. 	MRSC	Cycling Victoria, Event operators, Macedon Ranges Cycling Club DMT	Ongoing

ACTION 3.6 Increase number of cycle friendly tourism businesses. <ul style="list-style-type: none"> Provide assistance to businesses to become cycle friendly. Investigate the establishment of a cycle friendly business accreditation program similar to that operated by Tourism North East. 	MRSC	Macedon Ranges Cycling Club BATA's	Short Term
ACTION 3.7 Progress the Daylesford to Hanging Rock Rail Trail. <ul style="list-style-type: none"> Work with Hepburn Shire to attract funding for delivery of the Daylesford to Hanging Rock Rail Trail. 	MRSC Hepburn Shire	DMT RDV	Medium Term
ACTION 3.8 Continue to develop horse riding opportunities.	MRSC Parks Victoria	DELWP	Medium Term
STRATEGY 4 Improve presentation and visitor amenity of artisan villages.			
ACTION 4.1 Improve the amenity of the artisan villages. <ul style="list-style-type: none"> Identify streetscaping and township improvement works that will improve visitor amenity. 	MRSC	RDV	Short Term
ACTION 4.2 Continue to support arts and cultural events and the Macedon Ranges Art Trail and the Daylesford Macedon Ranges Open Studio Program.	MRSC	Daylesford Macedon Ranges Open Studios Macedon Ranges Art Trail	Ongoing
ACTION 4.3 Work with Bendigo and Castlemaine Galleries to investigate opportunities to leverage off major exhibitions.	MRSC	Visit Victoria Creative Victoria City of Greater Bendigo Mount Alexander Shire Council.	Ongoing
ACTION 4.4 Consider a night time projection art festival across the artisan villages in the Macedon Ranges.	MRSC	Visit Victoria Creative Victoria	Medium Term
ACTION 4.5 Manage high visitation at Macedon and Mount Macedon during autumn.	MRSC		Short Term
STRATEGY 5 Promote and develop quality food, wine and ferments experiences.			
ACTION 5.1 Encourage membership and promotion through Daylesford Macedon Produce.	MRSC DMT		Ongoing

ACTION 5.2	Investigate opportunities for food and beverage trails.	MRSC MRVA Macedon Ranges Agribusiness Forum	TMR	Medium Term
ACTION 5.3	Support cross promotion of local art, food and wine across the Macedon Ranges and boost networking within local villages. • Encourage galleries to support local produce and wines for openings and wineries to showcase local art.	MRSC TMR	MRVA DM Produce	Ongoing
ACTION 5.4	Further develop the region's culinary events, such as the Macedon Ranges Wine and Food Festival, Budburst and farmers' markets.	MRVA Event operators MRSC	DMT Visit Victoria	Ongoing
ACTION 5.5	Encourage local food and wine business to expand existing opening hours to cater for tourism markets (e.g. weekends/public holidays).	MRSC TMR BATAs		Ongoing
STRATEGY 6	Develop and grow the positive impacts of events and festivals.			
ACTION 6.1	Develop an events strategy to guide the future direction for events and festivals in the shire, including options for development and support of events of regional significance.	MRSC	DMT	Medium
ACTION 6.2	Develop a calendar of events to be promoted on visitmacedonranges.com and other channels.	MRSC		Short Term
ACTION 6.3	Create a clear and consistent internal process for booking public parks and reserves for weddings and other private events.	MRSC		Short Term
ACTION 6.4	Support the growth and promotion of makers' workshops and markets.	MRSC	Industry	Ongoing
STRATEGY 7	Support development of the emerging tourism products and experiences (weddings, Aboriginal cultural heritage experiences, wellness, mineral springs, agritourism and accommodation).			
ACTION 7.1	Work with Traditional Owners as part of Council's Reconciliation Action Plan to explore potential for low impact Aboriginal cultural tourism experiences.	MRSC Traditional Owners		Short Term

ACTION 7.2	Review and improve interpretive information and acknowledgement of Traditional Owners at key tourism locations.	MRSC Traditional Owners		Ongoing
ACTION 7.3	Work with Wurundjeri Tribe Council to investigate opportunities for Aboriginal cultural heritage experience at Wil-im-ee Mooring (Mount William).	MRSC Wurundjeri Tribe Council		Medium Term
ACTION 7.4	Encourage investment proposals at the Kyneton Mineral Springs to provide an improved visitor experience.	MRSC	RDV	Ongoing
ACTION 7.5	Review the Accommodation Opportunities Study 2010 to identify gaps in accommodation market and opportunities for investment.	MRSC		Short Term
ACTION 7.6	Investigate the opportunity for temporary camping to increase accommodation during events.	MRSC		Medium Term
ACTION 7.7	Compile and promote a register of all wedding venues in the shire, including niche venues such as small community halls, wineries, parks and gardens.	MRSC		Medium Term
ACTION 7.8	Investigate regulatory mechanisms to better support appropriate agritourism experiences.	MRSC		Short-medium Term
	<ul style="list-style-type: none"> Identify current policy issues and potential solutions through Council's review of the Farming Zone and Rural Conservation Zone. 			
DIRECTION C ADVOCACY, INDUSTRY COLLABORATION AND BEST PRACTICE DELIVERY				
STRATEGY 8	Improve industry professionalism and development			
ACTION 8.1	Deliver training and networking events.	MRSC TMR	DMT	Ongoing
STRATEGY 9	Advocate on behalf of the visitor economy and promote industry collaboration.			
ACTION 9.1	Advocate for the visitor economy within the Macedon Ranges.	TMR DMT	MRSC	Ongoing

<ul style="list-style-type: none"> Undertake ongoing research to track and monitor the visitor economy in the Macedon Ranges. 			
ACTION 9.2 Continue to collaborate and inform the tourism industry. <ul style="list-style-type: none"> Prepare a regular operator newsletter to communicate to industry. Undertake an annual networking function. 	MRSC DMT	TMR	Ongoing
ACTION 9.3 Assist business development. <ul style="list-style-type: none"> Provide support with becoming a tourism provider in the Macedon Ranges. Develop clear information regarding planning policy and regulations. Development clear decision guidelines to facilitate tourism experiences that are in keeping with the significant landscape, environmental and cultural values. 	MRSC	TMR	Ongoing
ACTION 9.4 Identify and advocate for transport initiatives to support and manage visitation.		MRSC	Medium Term

APPENDICES

APPENDIX A LITERATURE REVIEW

VICTORIA'S 2020 TOURISM STRATEGY, 2013- 2016

The tourism industry is recognised as an important economic driver for Victoria, worth an estimated \$19.1 billion to the economy and generating employment of more than 200,000 people (including both direct and indirect impacts). Victoria's 2020 Tourism Strategy provides a clear vision about how the tourism industry can increase its economic and social contribution to the State.

The Strategy is underpinned by the following:

- Increasing our focus on growth markets such as China in the short to medium term, and India, Malaysia and Indonesia in the medium to long term;
- Building stronger collaboration between the Victorian Government and the regions to ensure State wide priorities are met, whilst actively supporting the regional tourism industry to address local issues;
- Increasing the tourism benefit of major business events; and
- Identifying and realising key tourism investments.

VICTORIAN VISITOR ECONOMY STRATEGY, 2016

The Victorian visitor economy has been growing strongly in comparison to New South Wales and Queensland since 2010. The Victorian Visitor Economy Strategy 2016, prepared by the Victorian State Government highlights the key to this success is the diversity in product on offer in Victoria and recognises the need to strengthen this diversity.

The Strategy provides an ambitious goal to grow tourism expenditure across the State by 2024/2025 to \$36.5 billion and a strong focus to achieve this is by increasing visitor nights and encouraging international guests to explore regional Victoria.

The Strategy aims to support this growth through the following areas:

- Facilitating investment in tourism product and services;
- A focus on regional Victoria across all activities;
- Marketing activity that leverages all major visitor segments;
- A wider calendar of events that encourages visitor dispersal across Victoria;
- Visitor experiences tailored to the preferences of visitors from Asia; and
- Investing in key public infrastructure and roads.

PROTECTING VICTORIA'S ENVIRONMENT – BIODIVERSITY 2037

The Plan recognises that while Victoria's nature-based tourism industry is thriving and should be further promoted, it is also highly vulnerable to the future impacts of biodiversity loss. Tourism needs to be managed to ensure that sensitive areas do not receive too many visitors, and that such areas are well managed and resilient.

In regard to tourism, the Plan identifies the following relevant key points:

- By protecting and building the state's natural capital, we can enhance Victoria's ability to generate wealth and to compete on the world stage.
- Victoria will increasingly need to protect and utilise its environmental assets, including its world-class tourism attractions, to deliver co-benefits for the economy and environment, and to help communities become more liveable, resilient and climate adapted.

Point 5.3 of the Plan emphasises the economic importance of nature-based tourism, highlighting that the furthering of Victoria's reputation as a national leader in native wildlife and habitat recovery will be a beacon to interstate and international visitors keen to experience an abundance of unique Australian animals and plants.

Pertinent priorities to better care for and showcase Victoria's assets as world-class natural and cultural tourism attractions include:

- Work in collaboration with the community to ensure that Victoria's iconic natural assets keep offering opportunities to connect with nature and provide support to local economies;
- Develop policies and approaches to ensure that tourism to sensitive areas is sustainable and impacts are minimised; and
- Build on existing work to promote Victoria's environmental assets, at state-wide, regional and local levels, as world class natural and cultural tourism attractions.

DAYLESFORD AND MACEDON RANGES TOURISM REGION GOVERNANCE FRAMEWORK

The purpose of the governance framework is to set out the roles and responsibilities of all tourism stakeholders in the region to improve coordination, collaboration and cooperation between all organisations. As outlined in the framework the key responsibilities of Local Government is:

- To play a vital role in sustainability by fostering a vibrant local visitor economy, supporting businesses, encouraging entrepreneurs, delivering visitor information through VICs and the facilitation of planning and development for infrastructure;
- Encourage people in the region to explore and enjoy the local government area;
- Align consumer facing channels/collateral with regional brand, where appropriate;
- Delivery of consumer facing channels for local government areas;
- Visitor servicing;
- Internal marketing of benefits of tourism to communities and tourism experiences to maximise benefits from strong VFR market;
- Advisory role to new and existing tourism businesses;
- Targets regular communications to local government area stakeholders;
- Delivers business networking opportunities and 'buy local' programs;
- Industry workshops & training;

- Facilitates connections for business growth with relevant government and private sector stakeholders;
- Investment in product e.g. streetscapes;
- Acts as a regulating authority;
- Identifies and fosters business networks and associations;
- Operates an ongoing economic development and tourism department;
- VIC management;
- Funding to DMRT; and
- MRSC provides funding to TMR and other relevant tourism networks and projects.

DAYLESFORD AND MACEDON RANGES RTB, MARKET RESEARCH AND GAP ANALYSIS, MAY 2015

Colmar Brunton was commissioned by the Daylesford and Macedon Ranges Tourism Board (DMR RTB) to conduct market research to identify the markets perception of gaps in the region's tourism product. The report recognises the multiple offerings of the region including gourmet food and wine, cultural attractions and natural trails and parks. In regard to overcoming barriers, the report outlines the following is required:

- Promote breadth of experiences for next time;
- Raise awareness of breadth of offer beyond Daylesford and spas;
- Differentiate from generic 'regional' associations;
- Focus on families and children in broader area;
- Promote features such as mountains, waterfalls, lushness;
- Target special interest groups;
- Communicate distance from Melbourne (reference point). Affordable activities for families;
- How can region's water be enjoyed and help people cool off?
- Importantly, triggers to visit are about being close and escaping.

In terms of commonalities across visitor markets from Melbourne, there are two main activities that are recognised as gaps in the product offer in DMR, these include:

- A map containing colour-coded routes to explore the area yourself (i.e. chocolate drive or a winery drive); and
- A sampler basket including the best of local products.
- These gaps are further expanded on as follows:
- Patterns across Victoria markets indicate a need for products to assist with exploration of the region;
- About half of people are interested in a hot springs experience and this product has the greatest impact on consideration of visitation;
- About half of people are interested in hiking or bushwalking but the ideal experience encompasses a lot more than the hike or walk itself;
- A sampler basket product could facilitate exploration of the region and would encourage visitation to the area;
- Interest in a wineries/ breweries experience is strong and there is an almost equal interest in independent exploration and organised tours;
- Bike riding experiences appeal to a smaller, more niche market, but would still increase visitation to the region; and
- Art galleries also appeal to a smaller segment of the market. To create the ideal experience, the overall atmosphere is important- should be relaxed.

DAYLESFORD MACEDON RANGES TOURISM PRODUCT DEVELOPMENT PLAN

The Plan is currently being carried out by AEC group and an executive summary has been publicly released. The Plan outlines the desire to extend the successful regional brand positioning of the Daylesford Macedon Ranges region from Spa and Indulgence to Wellness and Rejuvenation. The five key priorities include:

- Wellness festival;
- Mineral springs infrastructure;
- Cycling suite of trails, events and experiences;
- Flagship wine centre; and

- Flagship mid-range, internationally branded hotel.

Further, in regard to Macedon Ranges the following prioritised opportunities have been identified:

- Music events at Hanging Rock;
- Mineral springs infrastructure around the region;
- Enhanced Hanging Rock experiences;
- Village art installations and streetscaping on Piper Street, Kyneton and High Street Lancefield;
- Flagship wine centre in Macedon Ranges;
- Megafauna and dinosaur experience in Lancefield;
- Cycling suite of trails, events and experiences across the region;
- Mountain bike tracks in Wombat Forest;
- Daylesford to Woodend Rail Trail;
- Hanging Rock to Woodend Trail;
- Velodrome redevelopment in Kyneton;
- Flagship internationally branded mid- range hotel in Macedon Ranges; and
- Campsite/ holiday park in Macedon Ranges.

MACEDON RANGES ECONOMIC DEVELOPMENT STRATEGY, THE WAY FORWARD 2009- 2019

The Macedon Ranges Economic Development Strategy recognises the important role that tourism plays in the sustainability of the shire. Tourism is highlighted as a major industry and employer in the shire that benefits local communities, business and townships, building on the region's strength in wine, food, arts and culture and the natural environment. The core focus of the Strategy lies in consolidating and building on the following relevant economic areas:

- An attractive environment in which to live, work and do businesses;
- Village life with unique vibrant and creative cultures;
- Viticulture and complimentary purposes;

- Sustainable tourism development;
- Encouraging more of a buy local culture;
- Proactive business development and attraction activities;
- Better maximise the strengths of economic activities i.e. tourism, environmental and cultural strengths; and
- Encourage higher levels of new business investment to compliment community cultures.

MACEDON RANGES EVENTS STRATEGY 2010- 2013

The Macedon Ranges Events Strategy identifies that over 200 events of all types take place in the shire varying in size, duration and professionalism. Weaknesses identified in the strategy include:

- Very few major events;
- Many community events promote themselves as tourism events, which can be misleading to visitors;
- Limited large indoor event space for major exhibitions;
- Limited promotion of events;
- Unprofessionally managed events impacting on return attendance (both local visitation and that outside of the shire);
- Limited event infrastructure available locally for events;
- Lack of large conference facilities particularly for business events; and
- Some event organisers have limited understanding of Risk management practices.

The Strategy provides Council with a clear action plan to address the above weaknesses and outlines the following commitment to events.

Council will:

- Continue to provide an annual Community Funding Scheme for community-based events run by incorporated groups;

- Encourage events that are diverse and stimulating, inclusive, interesting and engaging;
- Provide advice to schedule events across the calendar year avoiding conflicts of similar events (both within and outside the region) to achieve a balanced annual calendar;
- Support events that encourage visitation to the Macedon Ranges;
- Support events that recognise and protect social and natural heritage and the environment;
- Support events that work towards becoming financially sustainable;
- Provide advice, leadership and support for event organisers;
- Develop and distribute a handbook and guidelines to assist with events management;
- Support events that bring the community together and follow the vision of the shire; and
- Support events that promote health and wellbeing.

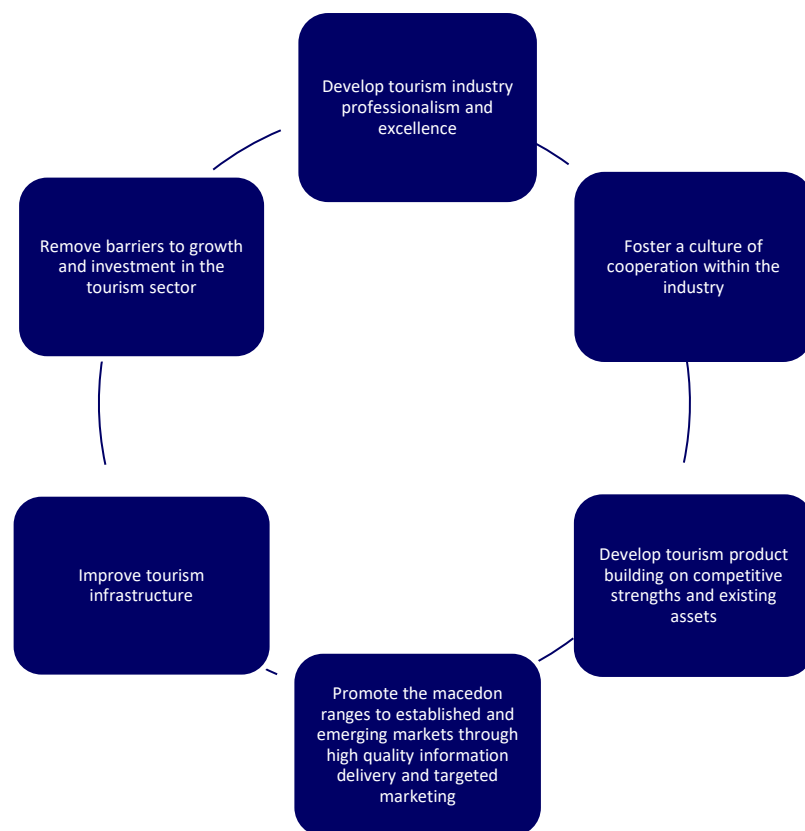
Council will not:

- Coordinate or support any event that Council does not have the capacity to adequately resource from either a financial or human resource basis; and
- Support events with no regard for the environment and sustainability practices.

MACEDON RANGES TOURISM INDUSTRY STRATEGIC PLAN JUNE 2011

Macedon Ranges Shire Council launched a strategic plan in 2011 that identified six strategic directions for the tourism industry. These strategies remain relevant today as core areas of our plan to 2021 and are represented in the diagram below.

STRATEGIC DIRECTIONS FROM THE MACEDON RANGES TOURISM STRATEGIC PLAN, JUNE 2011



MACEDON RANGES SHIRE COUNCIL PLAN (2017-2027) YEAR ONE

The vision for the Macedon Ranges Shire Council is “in partnership with the community, protect and enhance life across the Macedon Ranges”. This is supported by key priorities including priority 4, to “enhance the social and economic environment”. The aim of this priority is to “encourage economic vitality (tourism, agribusiness, buy local, local employment options)” and to “attract strategic

investment that is consistent with Council’s vision”. This will be achieved by increasing the opportunities for people to work locally; enhancing the economic impact of tourism in a way that is consistent with Council’s planning and environmental objectives; attracting strategic investment that aligns with Council’s vision; as well as identifying gaps in business diversity and encouraging new businesses.

MACEDON RANGES AGRIBUSINESS PLAN, 2013- 2018

It is important to note that agribusinesses in Macedon Ranges is undergoing a period of transition and most enterprises are continuously looking for opportunities to diversify. In regard to growth opportunities, the Plan recognises that

Macedon Ranges has a range of diverse products that require an identity to promote their niche value. Council has both experience (e.g. via tourism promotion) and networks (e.g. State and Commonwealth trade and development agencies) to support this. This can be achieved through supporting existing mechanisms (e.g. farmers’ markets) and increasing the local agribusiness presence in buy local campaigns and local business directories.

Strategy 13. Work with the market managers and the Victorian Farmers Market Association to identify ways to continue supporting the Farmers’ Markets within the shire.

MACEDON RANGES ENVIRONMENT STRATEGY, 2017

The Macedon Ranges Environment Strategy is a dynamic strategy with the vision for Macedon Ranges to be a place where Council leads by example and works with the community to maximise improved environmental outcomes in all aspects of life.

The actions from strategic directions and principles recognise the need to identify scope for enhancing environmental outcomes through Council policy, guidelines and processes and review them accordingly. Further, decision-making within Council should be in the context of a long term “planning horizon”, accounting for the cumulative environmental impact of individual decisions and actions.

MACEDON RANGES ARTS AND CULTURE STRATEGY, 2018- 2028

The vision for the Macedon Ranges Arts and Culture Strategy is that Macedon Ranges has cultural experiences that delight, engage and challenge locals and visitors.

Relevant key goals of the strategy include:

- Connect our community by interpreting and celebrating our region's stories; and
- Partnerships that inspire and support innovative arts and culture projects and activities.

It is an objective of the strategy to support local artists and arts-based businesses. There are also recommendations to work with the Kyneton Contemporary Art Triennial for future securing of that event.

A ten-year action includes supporting the Lancefield Megafauna Group to realise their vision of a permanent interpretive centre in Lancefield.

MACEDON RANGES WALKING AND CYCLING STRATEGY, 2014

The Strategy recognises the important role that trails play in nature- based tourism and the potential economic impact from commercial trail-based businesses and events. In regard to tourism trails the plan recognises the following issues and opportunities:

- Council participated in the Crossing Borders Tracks and Trails (2013) project, which was a joint initiative between Macedon Ranges Shire Council, Hepburn Shire, Central Goldfields Shire, City of Ballarat and State Government to investigate actions required to develop four iconic trail experiences in the region. One of the four projects was the Daylesford to Macedon Ranges Rail Trail. The report identified a number of social, recreational and economic benefits of each respective project, including the Daylesford to Macedon Ranges Rail Trail. The report outlined the steps required to successfully implement the project.
- Council is also currently undertaking further work to investigate the feasibility of establishing an off-road shared trail between Woodend and Hanging Rock.

- Council has also supported the development of a network of mountain bike trails in the Wombat State forest, managed by Department of Environment and Primary Industries, which attract significant visitation, events and tourism benefits. Opportunities to establish township based tourism trails, e.g. heritage trails, art trails etc, have been suggested.
- Determining the relative priorities for trail development continues to be an ongoing challenge for Council.
- Whilst the local economic benefits of tourism are acknowledged, discussions during consultation activities have consistently expressed a preference for the establishment of paths and trails that primarily benefit residents ahead of visitors.
- Council is currently in the process of developing a set of cycle tourism brochures and maps, highlighting key destinations and existing cycling opportunities in the shire. Similar brochures for walking already exist. These could eventually form the basis of an electronic application.
- Opportunities exist to ensure prioritisation for Council investment in tourism path and trail initiatives are guided by appropriate assessment criteria. The following table could be used as a guide to help determine the relative priority of future initiatives.

The following trail initiatives are listed in priority in order for consideration of possible Council support:

- Woodend to Hanging Rock shared trail;
- Gisborne to Riddells Creek off-road trail;
- Daylesford to Macedon Ranges Rail Trail; and
- Township specific heritage, arts or loop trails (as opportunities arise).

HANGING ROCK STRATEGIC PLAN, 2018

This plan recognises the importance of tourism and recreation objectives to reflect the broader role and significance of the precinct as achieved through key strategies:

- Manage sporting and recreational activities to reflect the role and significance of the Precinct.
- Support the continuing association of Hanging Rock as a place of gathering accessible to all visitors.
- Foster the tourism role of the Precinct in the region and state.

APPENDIX B PSYCHOGRAPHIC SEGMENTS SUMMARY

REGIONAL VICTORIA KEY TARGET MARKET⁷

Visit Victoria highlights the Lifestyle Leader segment as the key psychographic segment for Regional Victoria, with *Melburnians the key geographic target with a secondary audience of consumers within driving distance of regional Victoria (including those in New South Wales and South Australia)*.

This includes content tailored to multiple life stages including young people, singles, couples with no kids, families and retirees. Previous Tourism Victoria Domestic Segmentation⁸ highlighted that Lifestyle Leaders can be further differentiated by their varying passions, motivations, travel needs and behaviours, with the Lifestyle Leader population further segmented into four broad categories: Creative Opinion Leaders, Food & Wine Lifestylers; Enriched Wellbeing; and Inspired by Nature. Key characteristics of the Lifestyle Leaders segment are outlined below.

LIFESTYLE LEADERS

- Represent 30-40% of Australian population;
- Are progressive and aware of trends;
- Seek cultural experiences;
- Are socially connected; and
- Influence peers' opinions.

ROY MORGAN VALUES SEGMENTS⁹

The Roy Morgan Values Segments – are described as *an innovative system of market segmentation that goes beyond demographics and psychographics to explore the values, mindsets and attitudes that motivate consumer behaviour*.¹⁰

⁷ Visit Victoria, Wander Victoria Factsheet

⁸ Tourism Victoria, Melbourne Market Profile: Year ending December 2014.

⁹ Tourism Victoria, Understanding Visitor Needs and Expectation Factsheet; Roy Morgan Values Segment devised by Michele Levine of Roy Morgan Research and Colin Benjamin of the Horizons Network; Proportional approximates

Key segments as identified for the Macedon Ranges and a summary of their characteristics are outlined below.

VISIBLE ACHIEVEMENT

(Approximately 17% of the Australian population)

This pattern of thinking is associated with the proof of having made it up in the seemingly never ending social ladder. Personal recognition, higher incomes, job satisfaction and other tangible rewards of success such as travel, recreation and high-quality homes, vehicles and holiday location provide the very best of visible good living. Visible Achievement travels frequently and spends big on holidays. As with other purchases, they look for quality and value for money in their holidays. This segment is more likely to stay in luxury hotels and serviced apartments. Their holidays are a chance to spend time together as a family or as a couple doing activities such as visiting national parks, beaches, bushwalking and zoos or animal parks. They also enjoy holidays that provide the opportunity to enjoy food and wine as well as a leisurely round of golf.

TRADITIONAL FAMILY LIFE

(Approximately 20% of the Australian population)

This pattern of thinking personifies middle-ageing Australian home owners with relatively stable incomes that meet the needs of the smaller household. Energies revolve around the ideal of becoming grandparents or getting children to come home for visits or at least to keep in touch. Health and spirituality dominates a sense of meaning and purpose in life and being well-respected in the community is very important.

People from the Traditional Family Life segment are keen holiday tourers, reflected in their high tendency to use caravans and campervans and take longer than average holidays. A planned itinerary is a priority, hence their propensity to

based on Roy Morgan Single Source 2008; annual sample approximately 50,000 and Roy Morgan Holiday Tracking Survey January 2008 – December 2008; annual sample approximately 20,000.

¹⁰ Roy Morgan, <http://www.roymorgan.com/products/values-segments/about-values-segments>

undertake package tours and book through travel agents. They tend to stay in comfortable but good value accommodation, such as standard hotels and motels. Sightseeing is an important aspect of their holiday experience, with a greater tendency to visit museums, historical places, and gardens and parks. Visiting friends or relatives is also an important aspect of the Traditional Family Life's holiday experience.

SOCIALLY AWARE

(Approximately 14% of the Australian population)

*This pattern of thinking is usually associated with the highest socioeconomic group in the community. This **Mindset™ is the speciality of public servants, pressure groups, business analysts and politicians of all political colours. These "insatiable information vacuum cleaners" are addicted to finding out or trying anything that's new or different and persuading others to accept their opinions, priorities and lifestyle preferences. Socially Aware has the highest frequency of travel amongst the Values Segments, and spends big on holidays. They are highly likely to travel overseas, which reflects a high tendency to travel by air and hire a car. They tend to stay in rented accommodation, but also indulge in boutique accommodation such as bed and breakfasts and luxury hotels. On holiday, they like to experience cultural activities such as restaurants, food and wine, along with theatre performances, art galleries and museums. Socially Aware also enjoys outdoor and nature activities, as well as health resorts and eco-tourism experiences. This segment is also the most likely to use the Internet to book their holiday.*

TOURISM AUSTRALIA KEY INTERNATIONAL TARGET MARKET¹¹

Tourism Australia has adopted a psychographic segmentation approach to determine Experience Seekers as Australia's "ideal visitor segment", with the global campaign targeted at this segment, characteristics of this segment are outlined below.

INTERNATIONAL EXPERIENCE SEEKERS

- *Constitute around 30 to 50 per cent of all potential long-haul outbound travellers from key source markets;*
- *Are experienced international travellers;*
- *Seek out and enjoy authentic personal experiences they can talk about;*
- *Involve themselves in holiday activities, are sociable and enjoy engaging with the locals, are active in their pursuits and come away having learnt something;*
- *Are somewhat adventurous and enjoy a variety of experiences on any single trip;*
- *Place high importance on value and hence critically balance benefits with costs;*
- *Place high value on contrasting experiences (i.e. different from their day-to-day lives);*
- *Come from households that have higher than average household income;*
- *Are tertiary educated;*
- *Are open-minded and have an interest in world affairs;*
- *Are selective about their media consumption;*
- *Are opinion leaders within their peer and social groups; and*
- *Are not characterised by nationality, preferred holiday style/mode or age.*

¹¹ Tourism Australia, A Uniquely Australian Invitation, The Experience Seeker marketing experience factsheet.

APPENDIX C VISITOR ECONOMY REFERENCE GROUP

A project reference group has assisted with the development of this document. Membership of the reference group was targeted to include each of the shire's associations with an interest in the visitor economy, as well as industry stakeholders.

Jenny Stillman	Romsey Region Business and Tourism Association
Joe Leonello	Mt. Macedon and Macedon Business and Tourism Association
Peter Shaw	Mt. Macedon and Macedon Business and Tourism Association
Jason Sherrard	Business Kyneton
Dianne Padgham	Macedon Ranges Accommodation Association
Andrew Towner	Macedon Ranges Accommodation Association
David Rivers	Tourism Macedon Ranges
Adrian Gauci	Macedon Ranges Residents Association
Barbara Nixon	Macedon Ranges Vignerons Association
Will Jones	Industry stakeholder
Bryanna Sandercock	Industry stakeholder
Helen Cottew	Industry stakeholder

APPENDIX D REFERENCES

Macedon Ranges Visitor Economy Impact Study 2017
Tourism Research Australia Forecast Visitation to Victoria 2016 Issue
Victorian Visitor Economy Strategy 2016
Macedon Ranges Tourism Strategic Plan 2011
Macedon Ranges Environment Strategy
Macedon Ranges Arts and Culture Strategy 2018
Macedon Ranges Shire Council Plan (2017-2027)
Draft Macedon Ranges Statement of Planning Policy 2018
Macedon Ranges Walking and Cycling Strategy, 2014
Macedon Ranges Biodiversity Strategy, 2018
Hanging Rock Strategic Plan, 2018
Macedon Ranges Economic Impact Study 2009
Population and Visitor Estimator (PAVE) model
Australian Bureau of Statistics (ABS)
National Visitor Survey (NVS)
Tourism Satellite Accounts (TSA)

This strategy is our commitment that Council will work to grow the visitor economy, consistent with its Council Plan vision to work in partnership with the community to protect and enhance life across the Macedon Ranges.

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