



**Tourism
Midwest
Victoria**

2024 – 2033

Moorabool Shire Local Area Action Plan

Acknowledgement of Country

Moorabool Shire Council respectfully acknowledges the Traditional Owners of the land which includes the Wurundjeri Woi Wurrung, Wadawurrung and Dja Dja Wurrung people. We pay our respects to the Elders past, present and emerging.

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The development of this plan was funded by the Victorian Government.

All images have been sourced from Tourism Midwest Victoria's image library and Moorabool Shire Council.

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Image credit: justamelbournemama



Part 1: Executive Summary



Moorabool Shire is situated approximately 80 km northwest of Melbourne. The Shire encompasses a diverse and picturesque landscape, featuring a mix of rural and semi-urban areas, historic towns, and natural beauty. It is known for its quality produce, historic charm, diverse towns, and proximity to Melbourne, which makes it an appealing destination for both residents and visitors.

As a newly formed Visitor Economy Partnership (VEP), Tourism Midwest Victoria in collaboration with Moorabool Shire Council (MSC) has developed this Local Area Action Plan (LAAP). The LAAP has been developed to align directly under the regional Sustainable Destination Management Plan (SDMP). The SDMP seeks to:

- unite a new tourism region in times of unprecedented economic uncertainty;
- pursue growth while balancing the differing needs and wants of industry, visitors and residents; and
- adopt a sustainable approach to tourism development creating lasting benefits for Midwest communities.

This LAAP focuses on MSC specific recommendations to help guide the Shire’s visitor economy over the next ten years and Figure 1: Visitor profile snapshot 2023 (September YE)¹

reflects the needs of First Peoples’, community, industry, and Council.

Our current visitor snapshot

In 2023, the Shire attracted 532,000 visitors who collectively injected just under \$58 million into the Shire’s economy.

Despite grappling with the effects of the COVID-19 pandemic, the Shire has demonstrated resilience. Visitation in 2023 (based on September Year End data) exceeded pre-pandemic levels, driven by a domestic visitor market actively seeking an accessible regional destination.



532,000

Trips in 2023

- 81% domestic day trip
- 18% domestic overnight
- 1% international overnight



\$57.7 m

Spend in 2023

- 56% domestic day trip
- 44% domestic overnight
- 0.7% international overnight



3.0 nights

Average Length of Stay

¹ National and International Visitor Survey, Tourism Research Australia. Based on three-year averages, with the exception of COVID-19 impacted data from 2020 to 2023.



Our visitor economy in 2033

The Shire's visitor economy is projected to experience ongoing growth, both domestically and internationally, with a robust forecast outlook extending to 2033 (see Table 1).

Table 1: MSC forecasts²



Total spending in the Shire is forecast to reach \$110 million by 2033

Visitor spending in the Shire is projected to be 109% above the pre-pandemic level by 2033, generating an additional \$57.1 million in spend (up from \$52.4 million in 2019).

Total spending in the Shire has already surpassed pre-pandemic levels due to a combination of latent demand for travel and inflationary pressures.



Total visitors to the Shire are projected to reach 753,000 by 2033³

Growth to the region is projected across all visitor markets. Domestic visitors are projected to continue to account for the largest share of visitors in the region, with an estimated 598,000 domestic day trip visitors and 151,000 domestic overnight visitors expected in 2033.

The growth outlook for international visitors has strengthened based on state inbound forecasts, with high growth expected in key markets such as China, India and Southeast Asia. The recovery of Victoria's international overnight visitor market is anticipated to be stronger than Australia's overall. This is due to the state's unique market mix of visitors which has a strong growth profile, including large shares of Chinese and Indian visitors.

² Tourism Forecasts for Victoria, Department of Jobs, Skills, Industry and Regions (https://tourism.vic.gov.au/_data/assets/pdf_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf)

³ Ibid

Our strategic framework

Table 2 outlines the strategic framework that has guided the development of the SDMP and LAAPs and, in particular, the product development and opportunities analysis. It demonstrates the deliberate alignment that has been sought with state government strategies, which is specifically demonstrated in the alignment between the Experience Victoria 2033 Product Priority categories and the Tourism Midwest SDMP Product Pillars.

Table 2: Strategic framework guiding the Sustainable Destination Management Plan



Our plan on a page

This Moorabool LAAP aligns closely with the SDMP's strategic framework (see Figure 2), including SDMP's the vision, audiences, aspiration and positioning. The targets, however, identified in Figure 2 are for the Shire specifically.

Figure 2: Our plan on a page

OUR VISION

In the best possible way, this region is never what you expect. Here, the past, present, tradition, and creativity collide in positively unexpected and harmonious ways to create a distinct cultural offering and offbeat charm that leaves visitors beguiled and entertained in equal measure.

OUR VALUES

- We will support sustainable tourism growth.
- We will create our future by leaning into our past and our present.
- We will embrace the contrast of our region and own it, without judgement or fear.
- We will champion creative agitation, inspiration, and ideas for change to advance our region's reputation as a destination.
- We will promote collaboration and inclusivity, and encourage the respectful exchange of ideas.

OUR PRODUCT PILLARS

- First Peoples
- People and place
- Creative energy
- Nature at your fingertips
- Signature experiences

OUR WAY OF WORKING

- Sustainability
- Accessibility
- Inclusivity
- First Peoples engagement and partnerships
- Community wellbeing

Tier 1 targets - 2033

Tier 2 targets - 2033



● What we strive for

Growth in First Peoples' tourism representation.	Growth in community support for the visitor economy.	An increase in tourism businesses with sustainability accreditation.	An increase in the number of businesses to complete accessibility training.	Growth in industry financial contributions to regional marketing.	An increase in ATDW listings.	Growth in industry upskilling workshops.
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Priority local projects

While the SDMP focuses on regional-level initiatives, this LAAP concentrates on those that are within MSC or that fall across the broader Tourism Midwest Victoria region and will require local input for their implementation.

During the LAAP process, a wide variety of initiatives were identified for the Shire. To ensure the LAAP is implementable and realistic, the following are suggested as the priority local projects. These projects have been identified, workshopped, and discussed with community and council. Once these projects are underway, consideration can be given to rolling out additional projects identified.

Project 1: Destination branding exercise

Undertake a destination branding exercise for the Shire to grow a much clearer destination awareness. Feedback received indicates that currently, the visitor market struggles to understand the value and brand proposition of the Shire.

The brand work should be developed by a professional destination brand developer with strong industry involvement to help ensure buy-in. At this stage, a logical focus for the branding would be the Shire's agritourism and nature-based product.

Type	Demand initiative
Actions	<ol style="list-style-type: none"> 1. Commission the development of destination branding for the Shire to achieve stronger brand awareness of the region. This should be done in close collaboration with tourism operators to ensure buy-in.

Project 2: First Peoples' Art Gallery Development

While there is a strong desire to profile First Peoples more clearly in the tourism narrative of the region, it is important that this is guided and led by the First Peoples across the Shire and broader region. This will ensure that the narrative and experiences created are authentic and unique and that First Peoples are comfortable with the story being shared and undertaken at a time when they are ready to do so.

As identified in the Shire's Visitor Economy Strategy, there is potential to explore the establishment of a First Peoples art gallery through a strong collaboration with Traditional Owners. Such an initiative could establish a fresh arts hub within the Shire, tapping into the rich cultural heritage of the area. Additionally, it would offer a unique attraction distinct from galleries in neighbouring regions.

Type	Supply-side product
Actions	<ol style="list-style-type: none"> 1. Feasibility study for the development of a First Nations art gallery in Moorabool Shire, undertaken in partnership with Traditional Owners. 2. Identify potential grant funding streams that could be leveraged. 3. If the feasibility study is positive, determine a site and commission concept design work.

Project 3: Investment Attraction Strategy⁴

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

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

Type	Supply-side product
Actions	<ol style="list-style-type: none"> 1. Undertake an investment attraction strategy and prospectus focusing on gaps in tourism product such as accommodation and food related investment. 2. Deliver information on tourism development in rural areas, including planning-related guidelines to assist investment.

Project 4: Farmgate Experience Development and Enhancement

The Shire is known for its farm and agri-based operators; however, it can be difficult at times for the visitor to access produce. The opportunity exists to work with farm and agri-based operators to promote value-adding to their operations via the establishment of farm gates, tastings, and other on-farm experiences in Moorabool Shire.

Farmgate experiences offer visitors a chance to connect with the rural environment, gain insights into agricultural processes, and appreciate the efforts involved in food production. They promote local food systems, highlight the importance of sustainable agriculture, and support local farmers and producers.

Type	Supply-side product
Actions	<ol style="list-style-type: none"> 1. Engage farm and agri-based operators to gauge interest in value-adding to their operations via the establishment of farm gates, tastings, and other on-farm experiences. 2. Identify potential grant funding streams that could be leveraged. 3. Work with operators to enhance and develop business offerings to become 'visitor ready', through delivery of industry training and exploration of funding opportunities for business upgrades.

Figure 3: Existing pick-your-own produce in MSC



⁴ Moorabool Shire Visitor Economy Strategy, page 70.

Project 5: Activation of the Shire’s Key Walking Trails

The Shire is home to several State parks and forests and offers a large variety of walks and hikes for all levels. While these walks are fantastic assets to have, the opportunity to further activate them exists. Activation of 1 – 2 of the Shire’s major trails (such as the popular Lerderderg Track) could include the following.

- Develop a concept plan for a multi-day hike through Lerderderg, connecting Blackwood and Bacchus Marsh. Partner with Parks Victoria to explore the opportunity for temporary accommodation (e.g. glamping).
- Working with private/commercial tour operators to understand what additional infrastructure development may be required to support them operating on the trail.
- Work with hiking tour operators to encourage them to offer guided tours on some trails. These operators enhance the overall experience by providing insights into the local flora, fauna, history, and culture. Additionally, they often provide services such as transportation, gear rental, and packaged tours to make hiking more accessible and convenient for visitors.
- Develop marketing campaigns targeting outdoor enthusiasts, adventure seekers, and nature lovers to promote the hiking trails. Utilise various channels such as social media, websites, travel blogs, and tourism brochures to showcase the unique features and experiences offered by the trails.
- Partner with local accommodations, F&B providers, and other tourism-related businesses to create trekking packages or deals that combine trail experiences with other activities or services, such as accommodation packages, meal deals, or discounts on local attractions.
- Investigate the development of trekking events, festivals, or challenges to attract visitors and generate interest in the trails. These events could include guided hikes, trail running races, nature walks, workshops, or outdoor festivals featuring local food, music, and culture.
- Look to gauge interest by private providers to offer educational programs or workshops focused on topics related to hiking, outdoor skills, conservation, and sustainable tourism practices on the trails. These programs can enhance the visitor experience and foster a deeper connection to the trails and the natural environment.

Type	Supply-side product
Actions	<ol style="list-style-type: none"> 1. Develop a concept plan for a multi-day hike through Lerderderg, connecting Blackwood and Bacchus Marsh. 2. Engage in discussions with private/commercial tour operators to understand what additional infrastructure development may be required to support them operating on the trail. 3. Engage hiking tour operators to encourage them to offer guided tours on some trails. 4. Develop a marketing campaign targeting outdoor enthusiasts, adventure seekers, and nature lovers to promote the hiking trails. 5. Partner with local accommodations, F&B providers, and other tourism-related businesses to create trekking packages. 6. Investigate the development of trekking events, festivals, or challenges on one or more trails. 7. Gauge interest by private providers to offer educational programs or workshops on the trails.

Figure 4: Walking trails in MSC



Project 6: Bacchus Marsh and Ballan Key Township Activation Strategies

The opportunity exists to enhance the aesthetic appeal and functionality of both Bacchus Marsh and Ballan’s streetscapes and public spaces to create a more inviting and enjoyable environment for locals and visitors.

Consideration to developing a Township Activation Strategies for each town should be given. This could investigate initiatives such as more landscaping, adding pedestrian-friendly features like walkways and benches, installing decorative lighting, improving signage, upgrading wayfinding, and revitalising historic buildings or landmarks.

These enhancements aim to make the town more attractive to tourists, encouraging them to explore and spend time in the area, thereby boosting local businesses and economic activity.

Type	Supply-side product
Actions	<ol style="list-style-type: none"> Undertake township activation strategies for Bacchus Marsh and Ballan with consideration of streetscaping, art installations, lighting installations and placemaking improvements.

Figure 5: Bacchus Marsh town centre



Figure 6: Ballan town centre



Image credit: Garden of St Erth - Tony Evans



Part 2: Introduction



Overview and process for developing our plan

Tourism Midwest (TMV), in collaboration with Moorabool Shire Council (MSC or Council), has developed this ten-year Local Area Action Plan (LAAP). It has been completed concurrently with the broader regional Tourism Midwest Victoria Sustainable Destination Management Plan (SDMP) which covers the local government areas (LGAs) of Ballarat, Pyrenees, Moorabool as well as parts of Hepburn, and Golden Plains Shires.

This LAAP is informed by independent research and analysis, the Moorabool Shire Visitor Economy Strategy, as well as consultation with industry representatives, community groups, businesses, local government staff, councillors and government stakeholders.

Preparing our plan

The following investigations and inputs were undertaken or reviewed to inform this LAAP (Figure 7).

Figure 7: LAAP methodology



A collaborative approach

To develop this LAAP and the SDMP, wide engagement occurred with the local tourism industry, First Peoples, residents and government agencies. Visitor perceptions were also examined via online sentiment assessment.

These perspectives and research have shaped the priorities and actions identified as part of this work.

The input received from a wide variety of stakeholders was invaluable. Table 3 provides a summary of those consulted.

Table 3: Consultation summary

	<p>First Peoples – Barengi Gadjin Land Council, Wadawurrung Traditional Owners Aboriginal Corporation, Dja Dja Wurrung Clans Aboriginal Corporation and Eastern Maar Aboriginal Corporation were consulted via 1:1 engagement. Each organisation also provided feedback on the draft SDMP.</p>
	<p>Tourism industry – A series of industry and community workshops were held in each local government area throughout the project. Approximately 150 industry representatives and community members were met with. Industry representatives came from a broad mix of sectors, including accommodation, attractions, hospitality and transport.</p>
	<p>Government agencies – Visit Victoria, Regional Development Victoria, Parks Victoria, and the Department of Jobs, Skills, Industry and Regions.</p>
	<p>Community – A community survey was circulated, with 201 responses received. The findings of the survey are included in Appendix 2.</p>
	<p>Local government authorities – These included CEOs, councillors and members of executive leadership teams. Workshops were also held in each local government area, with staff from various departments in attendance.</p>
	<p>Investors and developers – One-on-one meetings and interviews with developers and investors.</p>
	<p>Other RTBs/VEPs – Bendigo Regional Tourism and Grampians Tourism.</p>

Phrases and concepts to know

There has been a considerable shift in how destinations view and interact with visitors to ensure tourism benefits the community more broadly. As a result, new concepts and terminology have been introduced to outline the procedures required to achieve these benefits. These are outlined in Table 4. A glossary has also been included in Appendix 2.

Table 4: Terms to know

Term	Description	Relevance to the LAAP
Sustainable tourism	Sustainable tourism aims to minimise the negative impacts of tourism on the environment, society and economy. It involves practices that seek to preserve natural resources, protect cultural heritage and support local communities. It often follows principles such as reducing carbon footprints and promoting conservation efforts.	This LAAP adopts a sustainable approach to tourism, seeking to identify mechanisms to mitigate any negative impacts tourism may have on the region's economy.
Regenerative tourism	Regenerative tourism goes beyond sustainability by actively working to restore and enhance the destination. The goal is to contribute positively to the environment and communities and includes initiatives such as reforestation projects, wildlife conservation and community development programs.	This LAAP has been guided by a regenerative tourism approach to decision-making, governance and implementation. The underlying objective is for the region to be left in a better state than it was before sustained tourism development and growth.
Stewardship	Stewardship refers to the responsible and sustainable management of natural and cultural resources by those involved in the tourism industry. Stewardship involves taking care of and preserving the environment, local communities and cultural heritage to ensure that the impact of tourism is positive and sustainable.	This LAAP sees stakeholders involved in tourism in Midwest Victoria as stewards and caretakers of the region's environment, community and culture.
Value of the visitor economy	Measuring the value of the visitor economy involves a range of qualitative and quantitative assessments, incorporating economic, social, environmental and cultural data.	This LAAP acknowledges that the value of the visitor economy cannot simply be measured through economic measures – there are a host of social, cultural and environmental benefits that can be created from a sustainable visitor economy. This plan therefore adopts a range of qualitative and quantitative targets to measure success.
Climate action	Climate action in the context of tourism refers to efforts and initiatives taken within the industry to mitigate and adapt to climate change.	The LAAP's recommendations include strategies and measures aimed at reducing the environmental impact of tourism activities and making the sector more resilient to the challenges posed by climate change. This was highlighted as a key desired outcome by several stakeholders.
Visitor economy ecosystem	The visitor economy ecosystem represents the interconnected and interdependent stakeholders that contribute to, and are influenced by, the tourism industry within a specific geographic area or destination.	This LAAP seeks to continue to strengthen the many relationships already in place and facilitate the development of new connections and collaborations.
Visitor economy	The visitor economy refers to the economic activities and benefits generated by visitors to a particular destination. It encompasses a broad range of industries and services that cater to tourists, including accommodation, transportation, attractions, entertainment, food and beverage, retail and various other tourism-related activities.	This phrase is used throughout this LAAP to emphasise the economic significance of tourism and related businesses in the Shire, particularly the role of tourists (including those visiting for a holiday, visiting friends and relatives, business, education etc) in supporting economic growth and job creation.

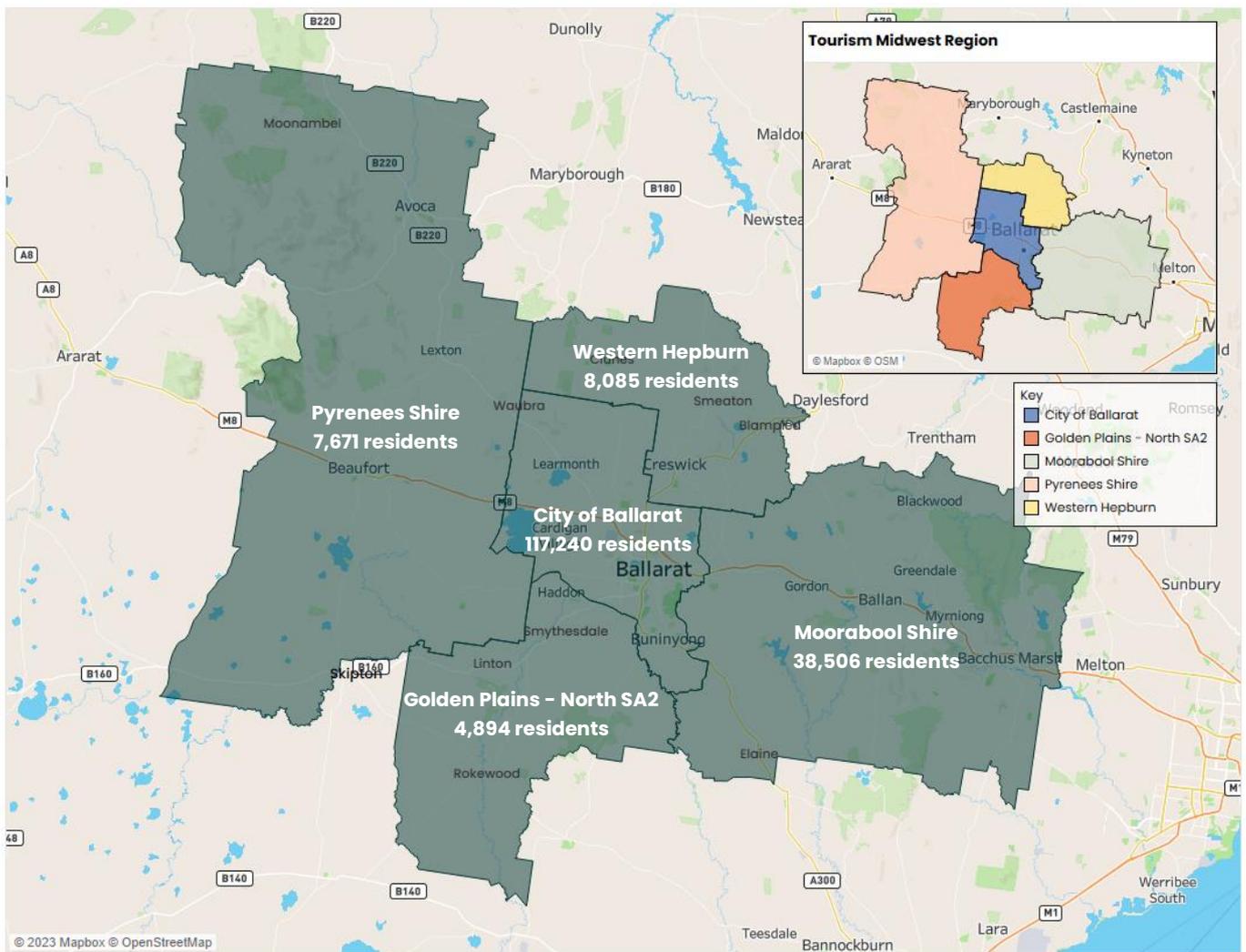
About the Tourism Midwest Victoria region

Victoria’s Midwest is situated approximately 1.5 hours from Melbourne, providing access to a market of just over five million people. It includes the local government areas (LGAs) of Ballarat, Moorabool and Pyrenees as well as parts of Hepburn and Golden Plains (see Figure 8).

The region is home to an estimated population of 176,000. About two-thirds of residents live in the City of Ballarat (66%). However, the region is experiencing significant population growth (increasing to over 225,000 residents by 2036), with the City of Ballarat and Moorabool Shire both projected to experience strong resident population growth rates.⁵

Each of these areas brings its own assets and features which, when brought together, help make Midwest Victoria a truly special destination.

Figure 8: SDMP scope



⁵ The City of Ballarat’s population is projected to grow by 27,000 residents (+23%) and Moorabool Shire’s population is forecast to increase by 18,000 residents

(+47%) (<https://www.planning.vic.gov.au/guides-and-resources/data-and-insights/victoria-in-future>)

Image credit: Mamma Knows West



About Moorabool Shire

Geography

Moorabool Shire is situated approximately 1 hours drive northwest of Melbourne. The LGA covers an area of just over 2,110 square kilometres⁶ and is home to an estimated population of 38,500 residents (as of 2022)⁷. Figure 9 outlines the geographic scope covered by this LAAP.

The Shire is strategically located close to the major generating population centre of Greater Melbourne, providing access to a population catchment of over 5.1 million residents which provides significant leverage opportunities.

The Shire's economy is diversified and reflects a mix of industries that contribute to its economic stability and growth. Key sectors for the Shire include agriculture, tourism, manufacturing, retail and services and health and aged care.

Many of the Shire's towns and buildings date back to the heady days of the 19th-century gold rush and stand as living testaments to a bygone era.

The rich soil and favourable climate of the Shire have made it a hub for agriculture, with bountiful harvests, from vineyards producing exceptional wines to orchards yielding fresh, local produce.

The rolling hills and fertile valleys provide a stunning backdrop for outdoor activities. Venture into the Lerderderg State Park or Brisbane Ranges National Park to witness the untouched beauty of the region. From bushwalking to birdwatching, the outdoors beckons with opportunities to reconnect with nature.

The Shire encompasses several towns and localities, with Bacchus Marsh being the largest and the administrative

centre. Other notable towns and areas include Ballan, Gordon, Balliang, Elaine, and Blackwood, among others. Each town carries its unique charm and history.

Some of the Shire's major visitor experiences include:

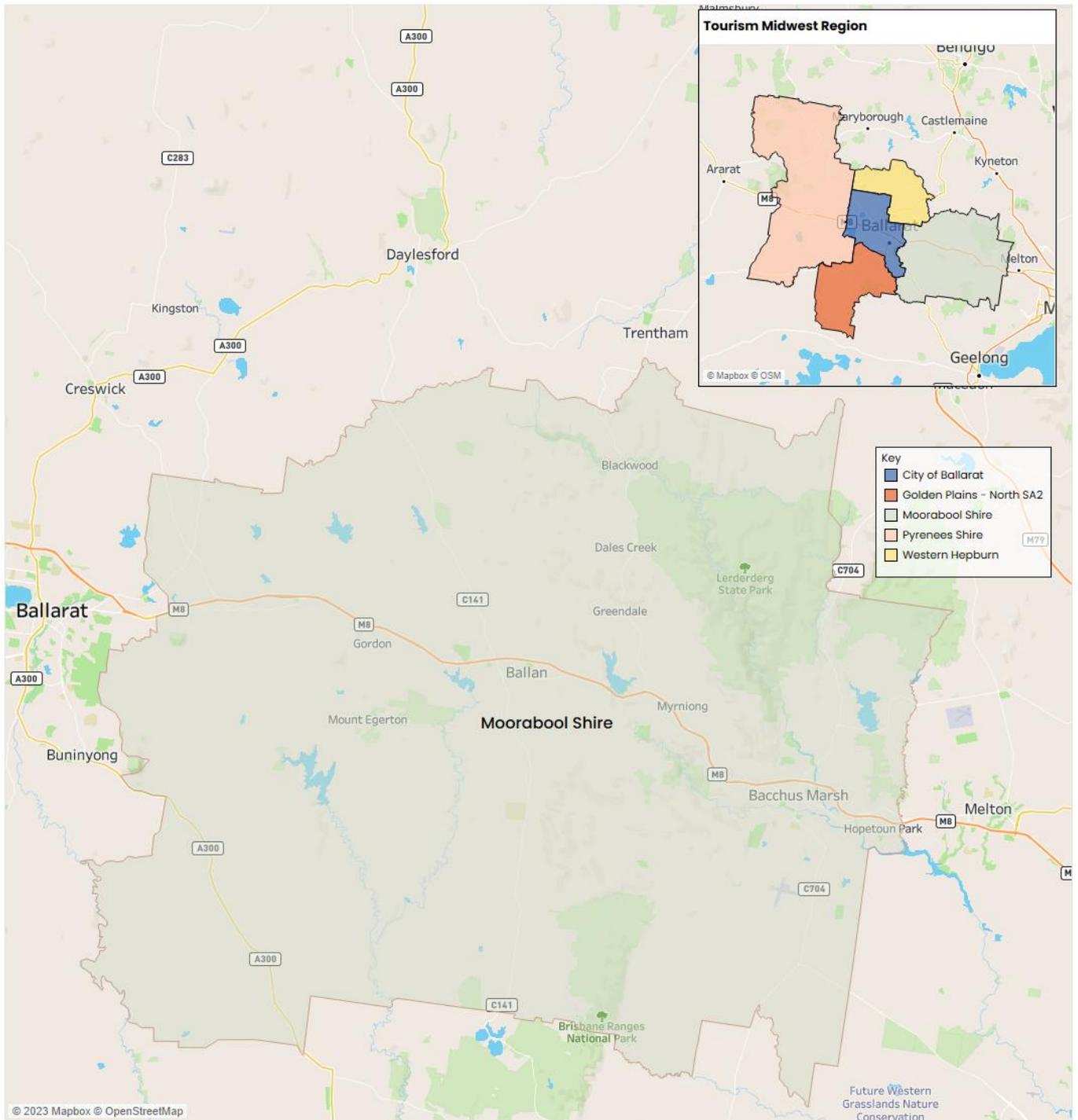
- **Bacchus Marsh:** Known for its orchards and fresh produce, Bacchus Marsh is a great place for visitors to taste local fruits. Explore the Lerderderg Gorge and the Avenue of Honour, a tribute to Australian soldiers.
- **Lerderderg State Park:** This park offers an array of outdoor activities, from hiking to camping. The park is known for its rugged terrain and the Lerderderg River, making it a great spot for a wilderness adventure.
- **Ballan:** Offers historical charm, where Victorian-era buildings and historical landmarks reflect the region's prosperous past. Ballan also offers the Ballan Autumn Festival which is held in March each year.
- **Kyral Castle:** is a unique tourist attraction and historical theme park located in Leigh Creek. It is often described as Australia's only medieval-themed adventure park and offers visitors a journey back in time to the days of knights, dragons, and feudal castles. It offers a range of activities, entertainment, historical displays, accommodation, and special events.
- **Blackwood:** Enjoy the natural beauty of Blackwood and use it as a base for exploring the Lerderderg State Park. This scenic town offers outdoor activities, historic sites, and serene landscapes.

⁶

<https://profile.id.com.au/moorabool/about#:~:text=Moorabool%20Shire%20encompasses%20a%20total,a%20large%20portion%20being%20forest>

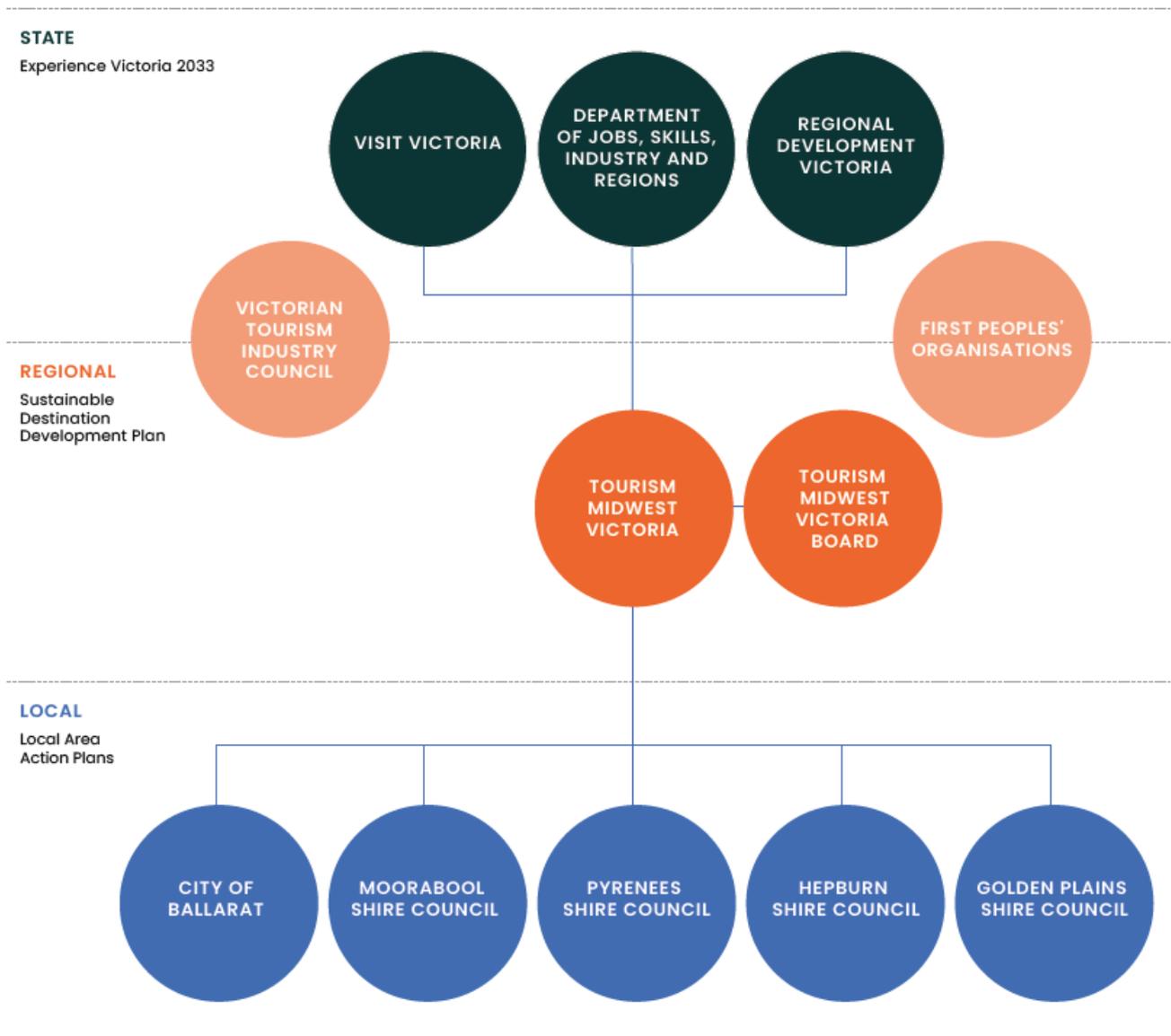
⁷ <https://profile.id.com.au/ballararat>

Figure 9: LAAP Scope



Governance

Figure 10: Tourism governance summary



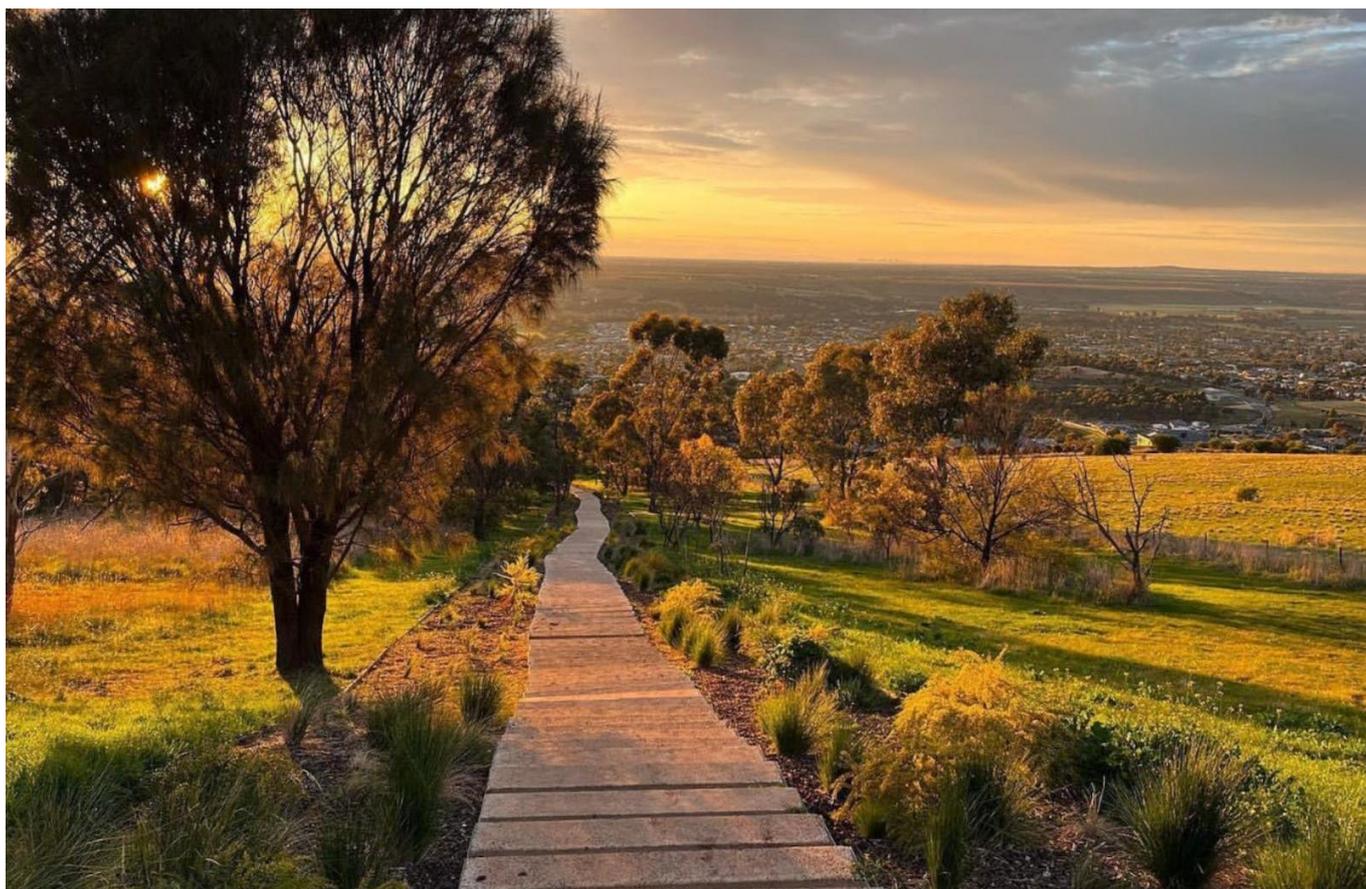
Roles and responsibilities

Outlined in Table 5 are the roles and responsibilities of these stakeholders in a tourism and destination management context.

Table 5: Roles and responsibilities

Stakeholder	About	Key roles/responsibilities
Visit Victoria	Visit Victoria is the state's official tourism and events agency. Visit Victoria plays a crucial role in promoting the state as a premier tourism destination and driving economic growth through tourism-related activities.	<ul style="list-style-type: none"> ▪ Destination marketing. ▪ Guiding regional positioning and development. ▪ Supporting industry development. ▪ Event attraction and support. ▪ Developing collaboration and partnerships to support tourism development. ▪ Distributing research and insights. ▪ Promoting and implementing sustainable tourism practices.
Department of Jobs, Skills, Industry and Regions	<p>The Department of Jobs, Skills, Industry and Regions (DJSIR) is focused on growing Victoria's prosperity and building the productive capacity of the state's economy and increasing participation. This is done by creating more opportunities for people through skills and jobs; helping businesses and industries to thrive; and building vibrant communities and regions. DJSIR works closely with Visit Victoria.</p> <p>Tourism and events are one of DJSIR's areas of focus. Within this, it is responsible for strengthening the profile of the visitor economy across government and influencing strategic reforms and economic outcomes for the sector.</p>	<ul style="list-style-type: none"> ▪ Undertaking research. ▪ Providing policy, strategy and industry development advice to the Victoria Government and industry on the visitor economy. ▪ Providing governance support and advice to several entities that market the state and secure events. ▪ Managing large-scale tourist attractions, precincts, facilities and entertainment venues in Victoria.
Regional Development Victoria	Regional Development Victoria (RDV) is responsible for supporting and facilitating economic and social development in regional areas of Victoria.	<ul style="list-style-type: none"> ▪ Managing funding streams and grant programs, such as the Regional Tourism Investment Fund. ▪ Business investment. ▪ Industry support. ▪ Advocacy.
Victorian Tourism Industry Council	The Victorian Tourism Industry Council (VTIC) is an industry association that represents the interests of the state's tourism operators and businesses.	<ul style="list-style-type: none"> ▪ Industry advocacy. ▪ Policy development (at a state and national level). ▪ Industry support and development. ▪ Networking and collaboration. ▪ Education and training. ▪ The provision of research data and insights.
First Peoples' organisations	<p>First Peoples' organisations care for Country, and each have their own culture, language, beliefs and practices.</p> <p>Acknowledges this, tourism and the visitor economy have a role to play in promoting culture and building understanding of, respect for, and learning from First Peoples' stories and traditions.</p> <p>More will be done to support the self-determination of First Peoples' as they develop visitor economy products and build Midwest's profile in the market.</p>	<ul style="list-style-type: none"> ▪ Cultural heritage management and services ▪ Welcome to Country and traditional ceremonies ▪ Cultural education ▪ Corporate education ▪ Cultural consultation ▪ Land management ▪ Language and naming.
Tourism Midwest Victoria	Tourism Midwest Victoria (TMV) is the Visitor Economy Partnership which covers the midwestern region of the state. It provides strong leadership and links between communities, all tiers of government and industry. TMV has a skills-based board that	<ul style="list-style-type: none"> ▪ Destination management planning. ▪ Destination development. ▪ Crisis planning and response management. ▪ Industry support and strengthening.

Stakeholder	About	Key roles/responsibilities
	comprises senior local government representatives and industry.	<ul style="list-style-type: none"> ▪ Advocacy on behalf of industry and local government. ▪ Destination marketing and regional conversion. ▪
Local government	In Victoria, local government plays a key role in supporting the visitor economy. The five local government areas in Midwest Victoria all deliver services that contribute significantly to the development and growth of the region's visitor economy.	<ul style="list-style-type: none"> ▪ Delivery of the LAAP for Moorabool and ongoing monitoring and updating as initiatives get activated ▪ Local tourism promotion and marketing. ▪ Provision of visitor information services, often via visitor information centres. ▪ Development and maintenance of tourism-related infrastructure including facilities such as parks, recreational areas, signage and amenities that enhance the visitor experience. ▪ Event support. ▪ Industry training. ▪ Community engagement to ensure tourism development aligns with community values and aspirations. ▪ In times of crises or emergencies, local government often plays a role in coordinating responses and providing support to the tourism industry. ▪ Regulatory functions related to tourism, including land use planning, zoning and permitting for tourism-related developments.



About Victoria’s Visitor Economy Partnerships

The Visitor Economy Recovery and Reform Plan released in April 2021 outlined the transition from Regional Tourism Boards (RTBs) to Visitor Economy Partnerships (VEPs). Under this new model, each VEP will:

- Have a clear sense of purpose and defined responsibilities;
- Encourage local and industry leadership, with senior local government, industry and skills-based board membership;
- Include all regions, with boundaries co-designed and agreed in collaboration with local government authorities;
- Leverage benefits of scale; and
- Have local ownership and flexibility with the broad geographic coverage to deliver region-wide initiatives.

Core responsibilities

The VEP framework provided by the Victorian Department of Jobs, Skills, Industry and Regions (DJSIR) very clearly outlines the core responsibilities of the VEPs, which include to:

- Deliver enhanced leadership and collaboration at a regional level.
- Tailor industry strengthening support to address regional needs.
- Encourage increased community support for tourism.
- Facilitate enhanced visitor dispersal and experiences.

- Undertake collaborative destination marketing and regional conversion.
- Provide insights and investor connections that inform a strengthened pipeline and product development.
- Provide regional context and insights to inform government policy development, decision making and investment priorities.
- Ensure continued crisis preparedness and support relative to the visitor economy.

Core benefits

The VEP framework also outlines the four core benefits of the VEP model, which include:

- | | |
|---|---|
|  | Official recognition, increased clarity and collaboration with the government |
|  | A more transparent funding model |
|  | Enhanced operational support |
|  | Access to data, insights and tools to track outcomes |

Key features

VEPs need to include the following essential elements and align with other VEPs across the state.

- Ensure clear roles and responsibilities including developing a sustainable destination management plan for the region. The SDMP should be reviewed and updated in three years.
- Establish solid governance with a broad skills-based board and a legal organisation with a clear constitution.
- Encourage regional collaboration by engaging stakeholders.
- Establish a sustainable organisation with strong financial and people management abilities, as well as business acumen.
- Recognise the advantages of a regional approach and scale over LGA or town-based institutions.
- Working with LGAs and local communities to develop Local Area Action Plans (LAAPs) that are specific to each town or area in the region. These LAAPs are also being developed concurrently with this SDMP.
- Ability to work across supply and demand, including product development, industry development and marketing.

About the Tourism Midwest Victoria VEP

The VEP for the region covers the City of Ballarat, the shires of Pyrenees, Moorabool, Golden Plains (south of Ballarat to Rokewood) and Hepburn (Creswick and Clunes).

Designed to strengthen and grow Midwest Victoria's visitor economy, TMV is the conduit between the five local government areas, the state government and the tourism industry. It supports its industry partners through business initiatives, the creation of visitor economy experiences and tourism products, and marketing and industry development.

Core responsibilities

The work of TMV is divided into three key areas:

Sustainable destination management

TMV's primary objective is to cultivate the region as a sustainable and thriving tourist destination, focusing on:

- Amplifying the economic and social benefits that tourism brings while proactively managing its potential impacts.
- Empowering the community to embrace the benefits of tourism and contribute to making the region an exceptional place to live, explore and share with others.
- Supporting businesses and entrepreneurs with industry programs to ensure visitors have an unforgettable experience and continue to return.

Marketing

TMV is dedicated to promoting the region as a must-visit travel destination every day of the year. Through strategic and targeted marketing efforts, TMV aims to boost the region's visitor economy and reshape perceptions. TMV's objective is simple: inspire visitors to love the region, just as the locals do.

Advocacy

TMV represents the region's industry across all levels of government. TMV are advocates for its Industry Partners and works tirelessly to bring lasting benefits to the broader community. TMV champions Midwest Victoria, ensuring the region's voice is heard and progress is achieved.

Strategic context

Alignment to strategic policy and direction is critical to the success of each LAAP (and the broader Tourism Midwest Victoria SDMP). These documents (see Table 6) provide a

range of findings and strategic directions relevant to the development of the region and local visitor economy.

Table 6: Strategies of relevance

Strategy	What is it?	How it has been aligned to this LAAP?
Moorabool Visitor Economy Strategy	The Shire's Visitor Economy Strategy (VES) was prepared to provide a strategic and unified direction for the development of a strong visitor economy between 2023 and 2027.	The strategic themes and projects that were identified in the VES align with the project opportunities identified for the Shire in this LAAP. Projects identified in this LAAP have aligned with each one of the themes identified in the VES including: Branding, Marketing and Resourcing, Enabling the Visitor Economy, Nature and Outdoors, Arts, Culture and Activation, Events and Food, Farmgate and Ferments. Part 5 of this LAAP specifies this alignment.
Experience Victoria 2033	The Victorian Government's strategic plan to shape the future of Victoria's visitor economy over the next 10 years. Experience Victoria's Product Priorities and Settings are outlined in Appendix 3.	There are several product priorities and settings that have been identified as both current and emerging strengths of the Shire. These are included in Appendix 3.
Destination Victoria Brand Strategy Playbook	The reference point defining what makes Victoria and its regions different and compelling. The Destination Victoria Brand Strategy playbook (see Appendix 4) was developed as a tool to define Victoria's overarching brand as well as its various sub-regional brands and the strategy behind these. A key objective of the playbook is to ensure the brand messaging for the state and each sub-regional destination is unique and compelling.	This LAAP has aligned with the Destination Victoria Brand Strategy by aligning the themes and product development opportunities in the LAAP with the state's sub-regional brand pillars.
Creative State 2025	Creative State 2025 is an integrated strategy to address longstanding and new challenges facing the creative industries and to grow their contribution to our society, economy and culture. Supported by a four-year budget of \$288 million, it is a strategy designed to enrich the lives of all Victorians.	Creative State 2025 builds on Victoria's strengths, tackles pressing and systemic challenges facing creative future collaboration and investment. With Creative Energy and People and Place product pillars of this SDMP, there is alignment through striving to improve equitable access to creative experiences and careers; and investment in new and established innovative creative products and experiences.
Central Highlands Regional Economic Development Strategy (REDS)	Developed by Regional Development Victoria, the REDS identify the strategic directions to further drive growth and prosperity in regional Victoria.	The REDS identifies five strategic directions based on the opportunities emerging from the region's endowments, industry specialisation and socioeconomic context. Of these five, the most pertinent is Strategic Direction – "continue to grow and develop the visitor and creative economies". Critical visitor and creative precincts identified in the REDS and that strongly align with this plan include: <ul style="list-style-type: none"> • The regional city of Ballarat, with its burgeoning creative scene and goldfields heritage, including Sovereign Hill; • The Pyrenees wine region; and • First Nations culture.
National Agritourism Strategy 2030	This strategy provides direction and toolkits for primary industries and producers to diversify and sustain their core business by offering products to visitors. It is a roadmap for farmers to unlock new business opportunities and encourage jobs for regional communities.	The strategy identifies six priorities that underpin the sector's growth. These strategic priorities demonstrate the opportunity for areas within the region to grow their profile as an agritourism destination and support producers to enable agritourism growth. Sustainable and inclusive farm diversification. <ul style="list-style-type: none"> • Community capability and capacity building with a focus on regional employment. • Develop new, high-quality, distinctly Australian agritourism experiences. • Promote the sector responsibly, with an alignment to food and drink. • Encourage genuine collaboration and enduring partnerships. • Provide sector leadership to support inclusive growth.

Our current product offering

Attractions and experiences

Moorabool Shire offers visitors a captivating blend of natural beauty, rich history, agri-tourism experiences and charming rural landscapes, making it an enticing destination for exploration and relaxation.

The primary appeal of the Shire currently relates to its high-quality orchards, agri-tourism experiences, and nature-based assets and experiences.

Emerging strengths for the Shire include building on its paid (commissionable) product offer and expanding on its First Peoples product offering.

Areas for enhancement and further development include, in particular, the supply of regional accommodation, and visitor economy supporting infrastructure.

Supply Assessment

The following audit is primarily based on an extensive 'data scraping' exercise that leveraged the following sources⁸: Tourism Midwest's database; the ATDW; TripAdvisor; Google Travel; and Google Maps.

Because the tourism sector is so far-reaching, there are many products, experiences and assets that can be considered tourism-based. This audit, has, however, focused on those which are considered primary tourism experiences, that is, those which are marketed and positioned as "things to do" when visitors travel to the region. Those products/experiences that are primarily utilised by the local community have, therefore, been excluded.

Figure 11 illustrates the findings of the attractions audit and demonstrates the following.

- Based on the audit findings, there are 51 tourist attractions and experiences in the Shire.
- Of these attractions, the most common type comprises Natural Areas and Trails (57%) supporting this as an existing product strength for the Shire, followed by Historic Sites and Museums (25%).
- The majority of products and experiences are clustered around the towns and villages of Bacchus Marsh and Ballan.
- A top-line assessment of free versus paid products was undertaken. This demonstrated that an estimated 78% of the Shire's tourism products are free versus 22% being

paid (compared with Ballarat, for example, which has 55% free and 45% paid products). While having 'free things to do' in a region is an important part of a region's product mix, greater economic benefit tends to be generated through commissionable tourism experiences. This is because of visitor spending on the product, the ability for wholesalers to package products is greater and the ability to reinvest in the product is greater.

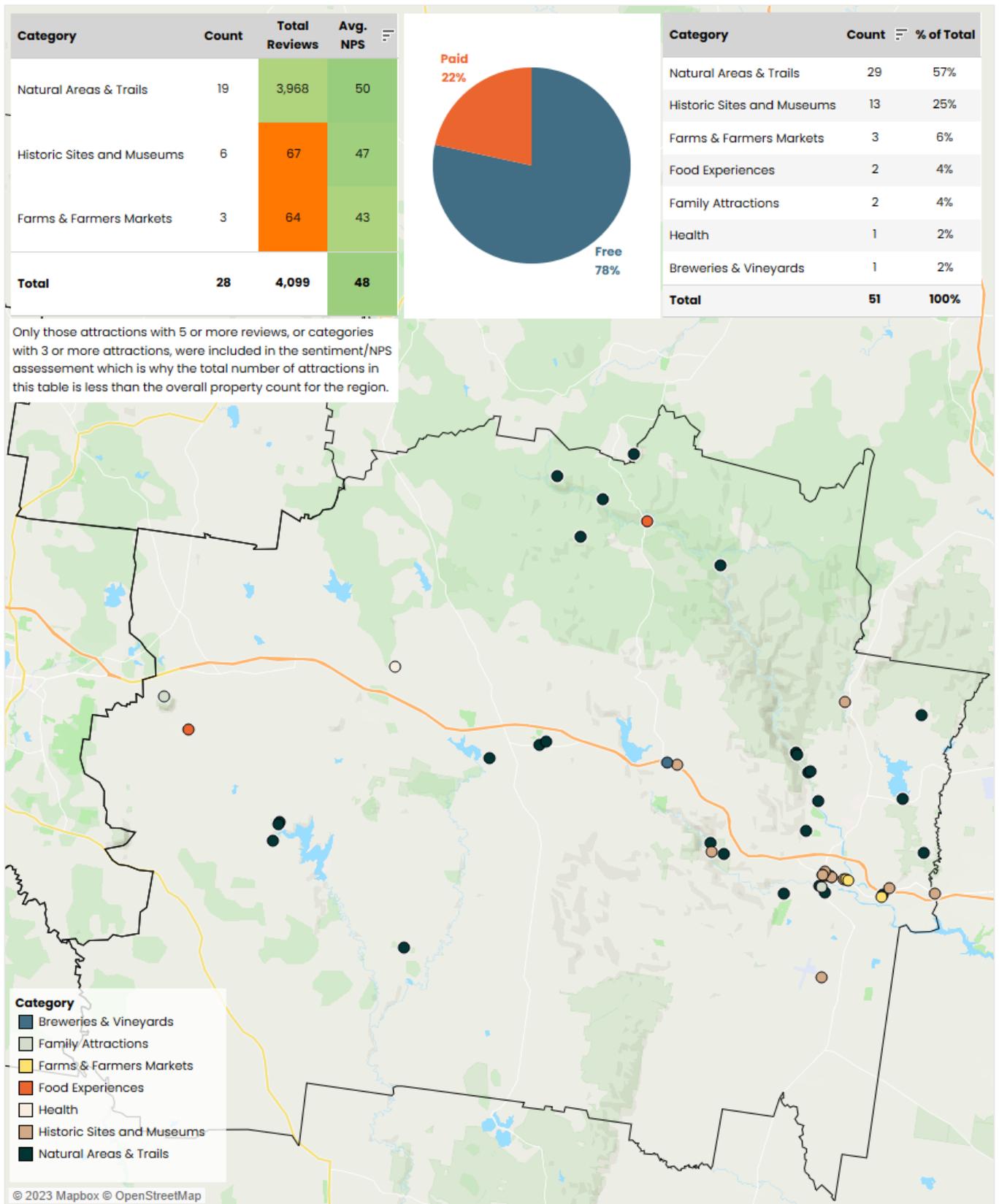
Sentiment Assessment

A sentiment assessment was also completed on products that had more than five reviews available and where there were more than three products in a category (see Appendix 5 for an overview of how net promoter scores [NPS] are calculated). As a result of a smaller sample size, the sentiment assessment results were limited, however, it did demonstrate the following.

- The Shire's experiences/attractions product receives an overall NPS of +48, based on 4,099 reviews.
- The product category that receives the highest average NPS score is Natural Areas and Trails, with a solid NPS of +50. This is based on 3,968 reviews across 19 different orators.
- The product category with the lowest average NPS is Farms and Farmers Markets. However, the score of +43 is still in the range of a good NPS.
- Paid product has a higher average NPS (+56) than free products (+48) reflecting consumer willingness to pay for products that are of a high enough quality/standard.

⁸ It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online. The audit was conducted over the period June – September 2023.

Figure 11: Moorabool Shire Attractions Audit



Accommodation

The Shire's accommodation supply is dominated by boutique properties, many of these being short-term holiday rentals. This has an impact on the ability to attract overnight visitors and results in economic leakage, as many visitors can only come as day travellers.

For the Shire to reduce economic leakage and derive stronger benefits from the visitor economy, there is a need to stimulate investment into existing accommodation stock and to introduce new accommodation properties. It needs to be recognised that most regions throughout Victoria are competing to attract new or refreshed forms of accommodation products which is seen as a clear product gap.

Supply Assessment

An accommodation audit was completed for the Shire. The audit revealed the following (Figure 12).

- The Shire's accommodation mix is dominated by Boutique Accommodation (43%) and Campgrounds (30%).
- The Boutique Accommodation product excludes some Airbnb properties as there is no way to eliminate dual listings across websites, however, a separate audit of Airbnb indicates that there are 1,776 Airbnb properties throughout the Midwest region – 8% (138) of which are in the Moorabool Shire. These Airbnb properties have an annual occupancy rate of 55%.⁹ While Airbnb accommodation is an important component of the region's accommodation mix, the dominance of this accommodation typology has created several challenges where the mix of resident housing, Airbnb stock and commercial accommodation appears to be out of kilter.
- The Shire has a limited amount of bookable unit stock. Usually, this stock is supplied by motels, hotels, and resorts but the Shire has a limited number of these properties. Feedback indicated that as a result, the Shire experiences leakage with visitors travelling for day trips and staying overnight in other areas that offer a greater mix of accommodation.
- There is a need to encourage the development of more accommodation in the Shire, including:
 - farmstays
 - smaller-scale boutique resorts and hotel properties
 - destination-style accommodation including glamping and eco-pods
 - upgrading and improving existing accommodation and motel stock
 - enhancements to caravan/holiday parks

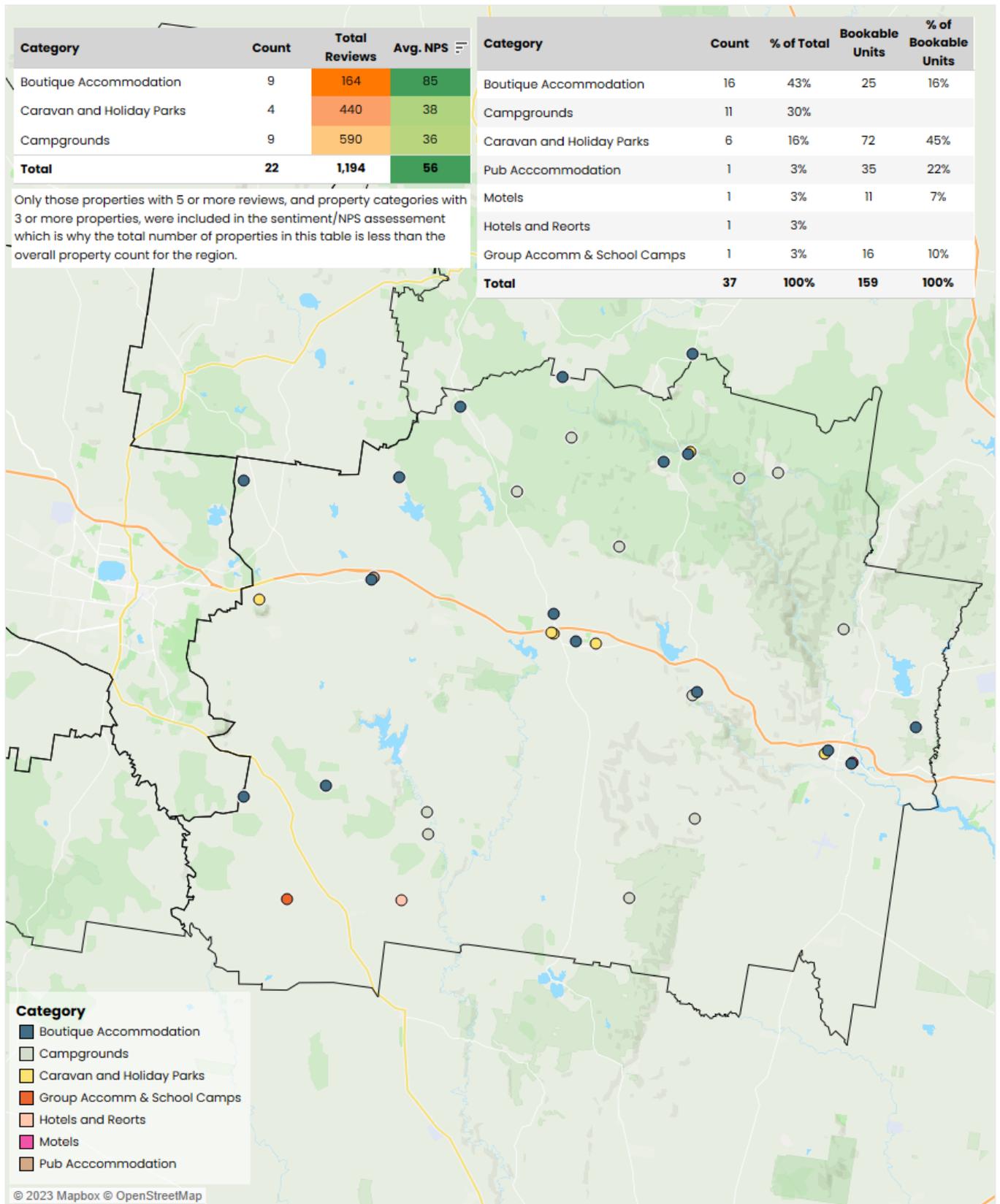
Sentiment Assessment

A sentiment assessment was also completed on products that had more than five reviews available and where there were more than three products in a category (see Appendix 5 for an overview of how net promoter scores [NPS] are calculated). As with this attractions sentiment assessment, this was limited due to the smaller sample size, however, the results that were able to be obtained indicate the following.

- The Shire's commercial accommodation product receives an overall NPS of +56, based on 1,194 reviews. This falls within the 'good' range for NPS scores (based on Stafford's work completing accommodation audits throughout the country).
- The category that received the highest average NPS score is Boutique Accommodation with a very high score of +85. Caravan and Holiday Parks and Campgrounds both received average scores of +38 and +36 respectively.

⁹ AirDNA

Figure 12: Moorabool Shire Accommodation Audit¹⁰



¹⁰ Note, bookable unit stock for caravan parks reflects bookable cabins only. It does not include camping sites as for most locations, this data was not available.

Gap analysis

Based on the product audit, consultation findings and site visits, the following product gaps have been identified (Table 7). These have been linked to the Product Pillars identified in Figure 18 on page 42.

Importantly, by recognising these gaps, opportunities for product development have been identified.

Table 7: Moorabool Shire product gap analysis

Product pillar		Product gaps and challenges	Product opportunity
First Peoples culture	Traditional Owners storytelling	<ul style="list-style-type: none"> Currently, First Peoples' stories are underrepresented throughout the Shire. 	<ul style="list-style-type: none"> To incubate First Peoples' product and grow representation through partnerships and appropriate product inclusions. To ensure all product development starts with a First Peoples' first approach. Develop an art gallery focused on First People's art and craft.
	A Sense of Place	<ul style="list-style-type: none"> Currently, significant historic buildings and streetscapes lack storytelling and activation. 	<ul style="list-style-type: none"> Showcase compelling history. Encourage adaptive reuse. Develop township activation strategies for Bacchus Marsh and Ballan.
People and Place	Arts and Creatives	<ul style="list-style-type: none"> Current core arts and cultural attractions require investment to meet visitor expectations and industry standards. 	<ul style="list-style-type: none"> Elevate arts and culture to drive visitation and dispersal. Development of an arts trail linking key products and towns.
	Gastronomic Excellence and Agri and Growers	<ul style="list-style-type: none"> A coordinated approach to leverage the Shire's gastronomic story consistently. Farmgate experiences are not available consistently for the visitor. 	<ul style="list-style-type: none"> Ensure the Shire's excellence in gastronomy is recognised through continuous investment. Establish a recognised strength in food provenance. Work with producers to enhance the Shire's farmgate product offer.
Nature at your fingertips	High Usage Trails and Iconic Views	<ul style="list-style-type: none"> The Shire has some high-quality nature-based products including two of the state's more popular walks. But there is a need to strengthen the quality of supporting infrastructure such as trail heads, car parks, viewing platforms, directional and interpretative signage 	<ul style="list-style-type: none"> Leverage proximity to Melbourne, promoting Nature at your fingertips for the less confident regional traveller. Be known for niche trail products that are more than just entry-level. Work with private providers to further activate and profile the Shire's key works. Regular maintenance program for trails to maintain their quality Advocate to Parks Victoria for ongoing investment into parks-based infrastructure.
Enablers	Visitor servicing	<ul style="list-style-type: none"> Visitor servicing does not meet the needs of today's traveller. 	<ul style="list-style-type: none"> Proactive visitor servicing methods enhance visitation and length of stay throughout the Shire and broader region. More online visitor information support
		<ul style="list-style-type: none"> Lack of accessible transport options. 	<ul style="list-style-type: none"> Advocate for transport and connectivity through the Shire and broader region.
		<ul style="list-style-type: none"> Town centres are not compelling enough for visitors. 	<ul style="list-style-type: none"> Beautification of town centres with consideration of night-time economy, outdoor dining, connectivity, wayfinding and storytelling, and parking for those towing caravans etc.

Product pillar	Product gaps and challenges	Product opportunity
Accommodation	<ul style="list-style-type: none"> Shortage of accommodation both in terms of quality, quantity and value proposition. Largely B&B and holiday home properties. 	<ul style="list-style-type: none"> Undertake an Investment Attraction Strategy to facilitate private-sector tourism investment in the Shire¹¹
Hospitality (cafés, restaurants)	<ul style="list-style-type: none"> In some areas, basic hospitality is unavailable or limited. 	<ul style="list-style-type: none"> Encourage consistent hospitality such as cafes, and weekend produce markets; availability is meeting visitor expectations via food and beverage operating rosters (to ensure something is always open) and offering industry upskilling programs.
Infrastructure	<ul style="list-style-type: none"> Directional and interpretive signage need improvements through the Shire. 	<ul style="list-style-type: none"> Undertake directional and interpretive signage audit for the Shire. Develop walking, cycling and driving circuits and trails to encourage longer lengths of stay and higher spend levels
Events	<ul style="list-style-type: none"> There are limited destination-driving events that grow brand, yield and length of stay. 	<ul style="list-style-type: none"> The Shire requires events/activations that take place over longer periods and activate after-hours to encourage staying longer in the Shire. Demarcation needs to be established between community and visitor-driving events through a strategic framework.
Marketing	<ul style="list-style-type: none"> Brand positioning that profiles the Shire as a sub-region of Midwest Victoria and showcases its strengths as an agri-tourism and nature-based recreation destination. 	<ul style="list-style-type: none"> New brand positioning to be considered for the Shire which aligns with wider Midwest regional positioning. A regional approach to be established to grow our reputation.
Planning and advocacy	<ul style="list-style-type: none"> Challenging for investors and developers to facilitate planning and land use arrangements across the Shire. 	<ul style="list-style-type: none"> Enable tourism infrastructure growth through advocacy to state and local government to address barriers and support investment in the Shire.

¹¹ As per Theme 2 (Enabling The Visitor Economy) Priority Project - Investment Attraction Strategy in the Shire's VES.

Our current visitor profile

Figure 13: Total Visitation and visitation by visitor type, 2014–2023¹²



In 2023, Moorabool Shire received an estimated 532,000 visitors, up 48% from 2021.

Historically, the largest source market for the Shire has been the domestic day trip market, comprising 81% of all visitors over the period assessed. This is likely because of the Shire’s proximity to Greater Melbourne.

While the day trip market forms an important component of the visitor economy, it typically is relatively low-yielding, accounting for 54% of visitor spending in the LGA in 2023. Domestic day trippers, on average, spent \$74 in the Shire, compared with domestic overnight visitors who spent 3.5 times this amount at \$259 per trip. Higher spending by overnight visitors is generated generally because of additional spending on accommodation, food and beverage, transport, attractions etc.

A key objective of this LAAP, as noted during the consultation phase, is to grow visitor spending and visitor yield. To achieve this, the Shire will need to focus on:

- encouraging investment into upgrading existing accommodation stock and the development of new accommodation;
- developing new, visitor-ready, and bookable experiences and products;
- enhancing infrastructure to support the development of the visitor economy generally including adequate town and site car parking, public toilets, signage, and wayfinding, picnic sites and stopping areas, visitor viewing platforms etc;
- creating bookable packages to support longer lengths of visitor stays;
- developing evening-based visitor products to encourage overnight stays and a thriving night-time economy; and
- introducing all-weather products (attractions and experiences) for times of inclement weather.

¹² Based on 3-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

Visitor forecasts

The Shire's visitor economy is projected to experience notable growth, both domestically and internationally, with a robust growth outlook extending to 2033.

Domestic visitor demand is projected to be softer than previously expected due to household budget pressures and strong pent-up demand for outbound travel.¹³

International visitor growth is anticipated to be strong, with visitation to the region expected to return to pre-pandemic levels by 2024. This is due to Victoria's strong profile in the Chinese, Indian and Southeast Asian markets, and the region's prominence as a VFR-friendly destination.

Supporting data for these forecasts are included in Appendix 6.

Table 8: MSC forecasts¹⁴



Total spending in the Shire is forecast to reach \$110 million by 2033

Visitor spending in the Shire is projected to be 109% above the pre-pandemic level by 2033, generating an additional \$57.1 million in spend (up from \$52.4 million in 2019).

Total spending in the Shire has already surpassed pre-pandemic levels due to a combination of latent demand for travel and inflationary pressures.



Total visitors to the Shire are projected to reach 753,000 by 2033¹⁵

Growth to the region is projected across all visitor markets. Domestic visitors are projected to continue to account for the largest share of visitors in the region, with an estimated 598,000 domestic day trip visitors and 151,000 domestic overnight visitors expected in 2033.

The growth outlook for international visitors has strengthened based on state inbound forecasts, with high growth expected in key markets such as China, India and Southeast Asia. The recovery of Victoria's international overnight visitor market is anticipated to be stronger than Australia's overall. This is due to the state's unique market mix of visitors which has a strong growth profile, including large shares of Chinese and Indian visitors.

¹³ Tourism Forecasts for Victoria, Department of Jobs, Skills, Industry and Regions (https://tourism.vic.gov.au/_data/assets/pdf_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf)

¹⁴ Tourism Forecasts for Victoria, Department of Jobs, Skills, Industry and Regions (https://tourism.vic.gov.au/_data/assets/pdf_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf)

¹⁵ Ibid

Visitor Servicing Overview

MSC, like many councils around Australia, is primarily responsible for providing physical brick-and-mortar information centres around the Shire, in addition to offering other tangible elements of visitor servicing (such as signage) as well as some elements of digital marketing.

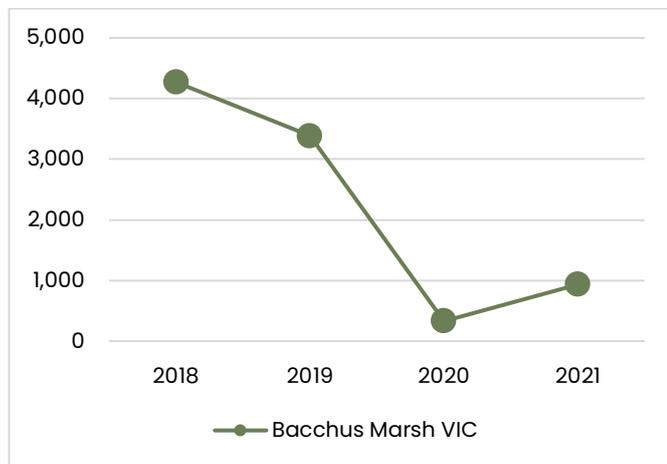
Visitor Information Centres

The Shire has an accredited VIC in Bacchus Marsh (see Table 9). Figure 14 provides a summary of visitation to the VIC from 2018 – 2021.

Table 9: About the VIC

Location
Bacchus Marsh Visitor Information Centre
215 Main St, Bacchus Marsh
Open Monday – Friday 9 am – 5 pm, Saturday – Sunday 10 am – 4 pm (closed some public holidays including Christmas Day and Good Friday)

Figure 14: Visitation to VIC, 2018 – 2021¹⁶



¹⁶ Provided by Council. Bacchus Marsh VIC was incomplete likely due to COVID-19 closures, with 2020 only containing one month worth of data (Jan 2020). The VIC was also closed for extensive periods in 2021.

Digital Content

Websites

The Shire is the only LGA that does not currently have a standalone destination website. It is noted, however, that it is a key priority of the Moorabool VES to develop a website to actively promote the Shire as a visitor destination.

The MSC website does provide a subpage (see Figure 15)¹⁷ that provides basic visitor information and the Shire is also profiled on the Visit Ballarat website under the Beyond Ballarat tab (see Figure 16).¹⁸ The tourism operator and events listings on the TMV website are extracted from the Australian Tourism Data Warehouse (ATDW).

Figure 15: Moorabool Shire’s visitor information website

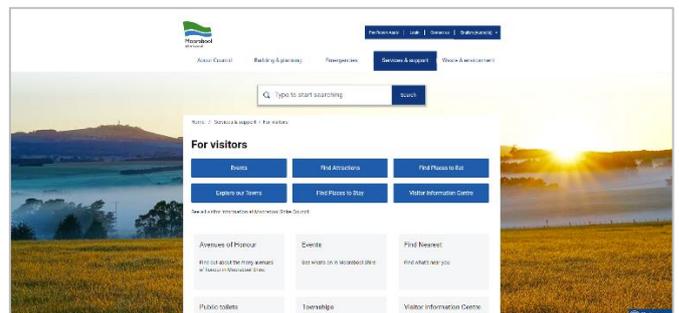


Figure 16: Visit Ballarat Moorabool Shire’s Sub-Page



¹⁷ <https://www.moorabool.vic.gov.au/Services-and-support/For-visitors>

¹⁸ <https://www.visitballarat.com.au/things-to-do/beyond-ballarat/moorabool/>

Social Media

Social media accounts on Facebook for Moorabool are not tourism-focused but rather are community and council-focused. There is also no Instagram, Twitter, TikTok or Pinterest account specifically for the Shire.

Content for the Shire is also generated via Visit Ballarat's social media accounts which have stronger engagement/reach and extend across a larger range of platforms.

Signage and Wayfinding

Wayfinding (directional) and interpretive signage are varied across the Shire and this fragmentation was noted by many stakeholders.

Wayfinding for tourism attractions i.e., brown & white directional road signs, are approved and managed by Vic Roads.

Several businesses have signage through the Vic Roads Tourism signage program.

A recommendation of the regional DMP is to undertake a region-wide signage audit to ensure that a cohesive approach to tourism signage (direction and interpretive) is applied throughout the Midwest region.

Printed Collateral

There appears to be limited printed collateral directly profiling Moorabool Shire and its towns and villages.

There is some collateral for individual towns/villages, such as the tourism maps organised by The Ballan & District Chamber of Commerce. The maps focus on the townships of Ballan, Gordon, and Blackwood. 40,000 maps were produced as 200-page desk pads in two separate editions.

Figure 17: Tourism Map





Part 3: Who are our audience segments?

Our community and the visiting friends and relatives market

The Moorabool Shire community holds the key to attracting the visiting friends and relatives (VFR) market. As hosts and trusted referrers, local residents have the greatest influence on how long their visitors choose to stay and how they spend their time and money. The VFR market is a significant market for the region, comprising 35% of all travel to Midwest Victoria¹⁹. Visiting a friend or relative is the second most common motivator for travel, after leisure-based travel.

To ensure the best possible experience for the VFR market, it is important the community takes pride in their region, is satisfied

with the pace and level of tourism development and understands the range of products and experiences on offer.

The following research was undertaken in June 2022.²⁰ While its sample was City of Ballarat residents, many of the findings are pertinent to the broader region (including MSC).

Importantly, the VFR market is identified in the Shire’s VES as an “existing and emerging market”²¹ for the Shire driven by the Shire’s “rapid population increase [which] will drive the growth of the VFR market to the region.”²²

Table 10: Visiting friends and relatives host and visiting friends and relatives market characteristics

VFR Host Market	VFR Market
 <ul style="list-style-type: none"> ▪ VFR hosts play a highly influential role in the destinations visited and the activities undertaken by VFR. Given the role of hosts, opportunities exist to market to local communities that influence visitor activities. ▪ Mature hosts are more at ease with centring a visit around their home. There’s an expectation that visitors are motivated by seeing ‘me’ and thus welcoming them in-home is tied to being a good host. By contrast, younger people are more likely to feel visitors want to make more of their visit and that sitting at home may feel too personal. ▪ Those with visitors coming from further afield/longer-term/less frequently are more focused on making a special effort. Hosts are compelled to ‘impress’ visitors by doing something out of the ordinary. ▪ High volume hosts (those who hosted >10 visitors in the past year) tend to be more socially outgoing. By contrast, some less outgoing hosts may find it more challenging to know where to take visitors (e.g. for dinner/drinks). ▪ VFR travel drives dispersion and spending – it encourages the VFR host market to try something new. ▪ Events are a major motivator for VFR visits, typically initiated by hosts rather than visitors. (e.g. not the visitor finding the event and inviting the host). ▪ VFR hosts are often more adventurous in their city because of their visitors (e.g. being pushed to do something different). 	 <ul style="list-style-type: none"> ▪ Those visiting family: <ul style="list-style-type: none"> ○ Tend to be older people. ○ Tend to be friends and family groups travelling with children. ○ Spend more nights staying in the homes of relatives or friends. ○ Are more likely to go shopping and spend money on transport, souvenirs and gifts. ▪ Those visiting friends: <ul style="list-style-type: none"> ○ Tend to be younger. ○ Spend more nights in commercial accommodation. ○ Tend to travel alone or in groups without children. ○ Tend to spend more on food and drinks, and at pubs and nightclubs. ▪ There is an increasing trend towards VFRs using commercial accommodation. People are going away on trips less often and want to make their break as stress-free and independent as possible while still enjoying social connections. ▪ VFR visitors tend to come without a plan (and this appears to be more common in the region than in other destinations). ▪ Local knowledge is felt to be particularly valued. It’s not always obvious what to do in the region compared to other destinations.

¹⁹ Based on a 10-year average, September YE.

²⁰ Visiting Friends, Visiting Relatives Research Report | June 2022, Quantum Market Research

²¹ Moorabool Shire Visitor Economy Strategy, page 32.

²² Ibid

Our visitors

Our audiences – a summary

We ask visitors to leave their preconceptions behind and open themselves up to all the region has to offer.

Midwest Victoria's, and therefore Moorabool Shire's, target audience segments are as follows: Active Regional Explorers; Table 11 provides information on these markets.

The markets that have greater applicability to the Shire and which share characteristics with the existing, emerging and growth target markets identified in the Shire's VES, include the following:

Table 11: Midwest Victoria and Moorabool Shire's target audience segments

Regional Fledglings	Mature Tastes
 <p>VES Alignment: Adult Couple Market</p> <p>Profile:</p> <ul style="list-style-type: none"> Make more frequent day and short overnight trips than other segments. More likely to consider the region in scope for a day trip (if metro-based). Are flexible to consider and convert to visiting the region (as well as other destinations). Young singles/couples or may travel as groups of friends. Metro-based and urbanised tastes. Follow emerging trends, not their parents' example. <p>What the market wants:</p> <ul style="list-style-type: none"> Explore through visitor-oriented producers, events/festivals, local operators etc. Food and wine focus and have the budget to support it. Lighter touch in the outdoors, may camp or bushwalk but it's principally a social endeavour. By far, the most compelling expression of the Midwest region is as a short weekend getaway with a full and interesting itinerary. Travel often, mostly on short weekend breaks or day trips. Emphasis on Airbnb-type accommodation. Trips are commonly based around a half-day hike/bushwalk. Modern dining, wineries, craft beer, music events/festivals, novelty and intrigue. 	 <p>VES Alignment: Touring and Grey Nomad Market</p> <p>Profile:</p> <ul style="list-style-type: none"> More often mature (40+) no kids, kids no longer dependent or kids left home. Relaxed budget, though not necessarily high spend. Overnight travellers, typically couples but sometimes with friends. <p>What the market wants:</p> <ul style="list-style-type: none"> Value taking it easy and relaxing over a packed itinerary. Self-identify as a foodie, make planned dining arrangements and seek out produce. Visitation is centred around townships, not nature. Schedule a handful of overnight trips per year, tending to be preplanned rather than spontaneous. More likely to be led by a female decision-maker. Modern food and wine offerings (but in the comfort zone). Spending time in picturesque settings (but limited proactive engagement e.g. art gallery). Brochures, information centres etc support online research. Higher-end accommodation and booked dining are a must-have starting point. Mature Tastes may look to operators (who specialise in their demographic) to suggest an itinerary. More than any other segment, Mature Tastes feel they know the destination and it's essential to inform them that here's more to the region's towns than just the main street.

²³ Target Audience Segmentation, December 2020, Quantum Market Research

Active Regional Explorers



VES Alignment: Sporting Market

Profile:

- Skew younger, often at the family life.
- Metro Melbourne suburbs.
- Educated, curious and enthusiastic.
- Engaged across channels, travel extensively and widely, and participate in a broad range of activities.
- Spend the most per night and spend more nights away than any other segment.
- They are also the most likely to consider and convert to visiting the Midwest (as well as other destinations).

What the market wants:

- Seek out enriching experiences; aspire to more than just 'relaxation'.
- Don't conform to one trip 'type', they arrange different itineraries to suit different needs.
- Take weekend and extended trips, typically touring to cover more than one activity.
- Above average spend, prioritise recreation in their household budget. Can include VFR spend.
- Engage in one or more outdoor pursuits, often cycling, fishing, or getting into National Parks.
- When they travel, they like to stay active and the majority like to experience the local culture and see nature.

Family Heartland



VES Alignment: Family Market

Profile:

- Aged 30-49, with one or more kids under 16.
- A mix of metro and regional audiences.
- High household income and spending (a marker of life stage, not luxury).

What the market wants:

- Busy working parents, balancing multiple commitments, seeking a break.
- Conceptualise travel as a 'holiday', which is arranged and looked forward to in advance.
- Expect kids' activities - conventional child-oriented fun.
- May travel with other families; certainly prioritise kids hanging out with other kids.
- Self-contained accommodation, including managed camping and holiday parks.
- Tend toward regional centres and larger townships 'with more to do'.
- Looking for days out, attractions and traditional family fun.
- Side trip into nature or national parks, but not the focus.
- Separate 'art' from 'culture'. Particularly in this segment, 'art' is actively off-putting. Its presence in the mix inhibits the region from conveying a compelling cultural proposition.
- Promote the holiday vibe. Family Heartland need to believe that other families like theirs are having a great time in the region and they'll likewise feel entertained. Family fun-oriented accommodation will be core to this e.g. with a pool/jumping pillow).

Domestic Culturally and Linguistically Diverse (CALD) Visitors



VES Alignment: Accessible Tourism Market

Profile:

- Reflects the large culturally diverse communities living in greater Melbourne.

What the market wants:

- Keen to explore culture and nature but with social connections to local similar community groups (VFR, social groups).
- They may try a variety of niche products and are not yet focussed on one specific niche area, such as wine tourism.
- Trips are generally short and aligned to weekends or public holidays along with culturally significant periods such as the Lunar New Year or international visitation patterns.
- Word-of-mouth and social media feedback from others in the same cultural group is often a major motivator for encouraging regional visits (this includes where to go, how long to stay, where to access food etc).
- They will often find top tourist locations to visit via online websites and niche social media platforms that rank where best to go and what to do.
- Preference for family-friendly and ticketed visitor attractions rather than off-the-beaten-path experiences, remote nature walks or unstructured travel.
- Different cultures vary in their degree of flexibility and spontaneity when planning a trip, and this may often come down to the size and composition of the travel party and how familiar a local host is with the destination.
- Getting fresh air and scenery are must-haves when leaving the city.
- They seek highly accessible nature where the car park, footpath etc are all within proximity for day use.
- Sitting in formalised nature (lakeside picnic sites, botanical gardens etc) is sought-after.
- Stopping to look at the scenery and visiting easily accessible lookouts is desirable.
- Marketing to specific CALD audience segments requires a tailored approach that takes into account their unique information gathering and product preferences, acknowledging there is significant diversity within these communities and between cultural groups.

International High Value Travellers



Profile:

- Victoria's key international markets for demand-driving marketing activity are High Value Travellers (HVTs). HVTs are empowered and increasingly knowledgeable about the world around them.
- HVTs can be leisure tourists, working-holiday makers, visiting friends and relatives, or business travellers.
- In focusing on these key target markets, we aim to attract key groups that will deliver high yields and benefit the region.

What the market wants:

- They want to experience everything from the local cuisine to the natural surroundings.
- HVTs view knowledge about a destination as fundamental to an enriching travel experience.
- HVTs prefer authentic holidays where they experience the local culture and everyday life.
- They will pay for quality experiences, especially if these are unique and able to be visited as part of a smaller group.
- They want to visit iconic sites and have meaningful experiences, whether via guided tours or self-guided.
- Overnight visitors need quality accommodation options or they visit as day trippers.



Part 4: What will our future look like?

Our vision, aspiration and values

The following aligns directly with the vision and values developed for the SDMP and which align with this LAAP.

Our vision

In the best possible way, this region is never what you expect. Here, the past, present, tradition, and creativity collide in positively unexpected and harmonious ways to create a distinct cultural offering and offbeat charm that leaves visitors beguiled and entertained in equal measure.

Our values

- We will support sustainable tourism growth
- We will create our future by leaning into our past and our present.
- We will embrace the contrast of our region and own it, without judgement or fear.
- We will champion creative agitation, inspiration, and ideas for change to advance our region's reputation as a destination.
- We will promote collaboration and inclusivity, and encourage the respectful exchange of ideas.

Table 12: Our values explained

1	<p>We will support sustainable tourism growth.</p> <p>We are dedicated to establishing a sustainable and thriving future for our community by fostering responsible tourism growth and mindful development practices.</p>
2	<p>We will create our future by leaning into our past and our present.</p> <p>By understanding and respecting our unique heritage, culture and characteristics, we aim to create a future that both preserves and builds upon the essence that defines Victoria's Midwest.</p>
3	<p>We will embrace and own the contrast of our region.</p> <p>We are committed to acknowledging and celebrating the diverse and distinctive elements of Midwest Victoria. We will embrace these unique contrasts, whether they be cultural, geographical or experiential, without passing judgment or yielding to fear of differences.</p>
4	<p>We will champion creative agitation, inspiration and ideas for change to advance our region's reputation as a destination.</p> <p>We are committed to creativity, forward-thinking strategies and embracing our differences to grow the region's profile. We adopt a proactive and dynamic approach, acknowledging that positive change often arises from creative thinking and a willingness to challenge the status quo.</p>
5	<p>We will promote collaboration and inclusivity and encourage the respectful exchange of ideas.</p> <p>We recognise that the success of our visitor economy is inherently linked to the collaborative efforts of our various stakeholders, including First Peoples' organisations, local communities, businesses, government entities and visitors.</p>

Our success targets

Our stakeholders are dedicated to realising the full benefit of the visitor economy.

To ensure we're on the right track of developing a "sustainable destination that enhances communities," a series of targets have been developed across the categories of economy, industry, community, culture and environment to measure our success.

Some of these targets can be more easily measured than others. Those targets that measure the value of the visitor

economy using established metrics are indicated in Table 13. These targets are forecast based on third-party datasets such as Tourism Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS)

There are also a variety of targets that are not so easily measured but which we will strive to achieve as a destination (these are summarised in Table 14). These targets will require the development of some new indicators that will be resourced, activated and reported on going forward.

Measuring the value of the visitor economy

Table 13: Our success targets (measuring the value of the visitor economy)

	Measure	Target Type	Source/Benchmark	Current (2023)	Goal (2033)
Tier 1 Targets		Visitation	Visitor numbers to the Shire (day and overnight, domestic and international) as per the NVS & IVS.	532k	753k
		Visitor spend	Spend by visitors in the Shire as per the NVS & IVS.	\$57.7m	\$110m
Tier 2 Targets		Ratio of day to overnight visitors	Number of day to overnight visitors as per the NVS & IVS data.	0.23	0.26
		ALOS	Visitor nights data divided by visitation data collected from the NVS & IVS	3.0	3.6
		Spend per visitor	Total visitor spend data divided by total visitation data captured from the NVS & IVS	\$108	\$146
		Employment	Tourism employment data from Remplan and Economy ID (sourced from Tourism Satellite account)	420	462

What we strive for

Table 14: Our success targets (what we strive for)

Target	Target type
 Growth in First Peoples' tourism product and business representation	Culture
 An increase in the number of businesses with sustainability accreditation	Environment
 Growth in community support (social license) for the visitor economy	Community
 Increase in the number of businesses who have completed the Quality Tourism Framework Accessible Tourism module	Industry
 Growth in industry financial contributions to regional marketing	Industry, Economy
 Increase in the number of tourism businesses listed on the Australian Tourism Data Warehouse (ATDW)	Industry
 Growth in industry participation in TMV upskilling opportunities	Industry

Our direction and focus areas

What will we be known for?

Midwest Victoria and Moorabool Shire will be known for consistently providing an exceptional and brilliantly unexpected experience. We will do this by delivering products across five curated product pillars.

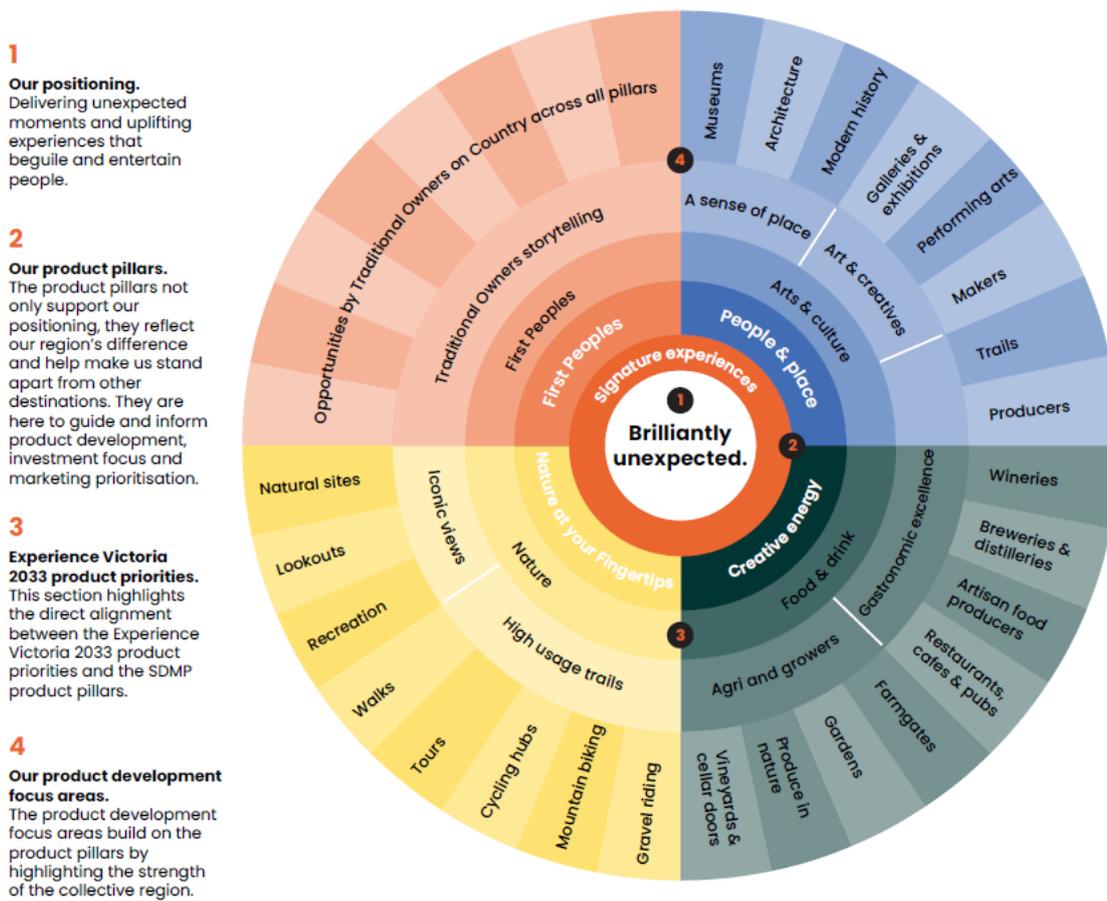
Figure 18 encapsulates the direction for the region that has emerged through the SDMP and LAAP planning processes.

This serves as a pivotal reference to ensure alignment across the region, guiding forthcoming initiatives in planning, marketing and product development.

The strength of the Shire lies in its strong current focus on farmgate and pick-your-own produce experiences and its highly accessible nature-based experiences, particularly walking trails.

This also supports the broader Midwest region and avoids having a vanilla flavour across the region. The Shire's tourism product aligns well with two of the State Government's tourism product pillars of nature attractions and food and drink.

Figure 18: Our direction and focus areas



Enablers		
<p>PRODUCT DEPENDENCIES</p> <ul style="list-style-type: none"> Accommodation Transport and connectivity Hospitality 	<p>SUPPORT ACTIVITIES</p> <ul style="list-style-type: none"> Visitor servicing Marketing Industry training and development 	<p>GUIDING PRINCIPLES</p> <ul style="list-style-type: none"> Inclusivity Accessibility Sustainability Community wellbeing

Positioning²⁴

Time-made and ever-changing; the Midwest Victoria region is a *Brilliantly Unexpected* blend of culture, history and creativity.

Product pillars

Our product pillars not only support our proposition, but they reflect our region's differences and help make us stand apart from other destinations. Our product pillars are here to guide and inform product development, investment focus and marketing prioritisation.

Signature experiences

Signature experiences are those that are unique to Midwest Victoria and deliver those *Brilliantly Unexpected* experiences the region wants to be known for. These experiences enhance and nurture the region's cultural, artistic and events landscape to further cement our reputation as a dynamic and contemporary destination.

First Peoples Culture

These products and experiences acknowledge, celebrate and elevate First Peoples' participation, history and culture (past and present). They uplift First Peoples' stories and leverage First Peoples' involvement to add value and depth to our visitor economy.

Five First Peoples groups have Country across Midwest Victoria:

- Barengi Gadjin Land Council
- Wadawurrung Traditional Owners Aboriginal Corporation
- Dja Dja Wurrung Clans Aboriginal Corporation
- Wurundjeri Woi Wurrung Cultural Heritage Aboriginal Corporation
- Eastern Marr Aboriginal Corporation.

Feedback from these groups indicates a desire to find tourism development opportunities to support local employment and to particularly find partnership opportunities in parks for guided tours, storytelling and potential for onsite accommodation and related products etc.

People and Place

To counter the region's heavy reputation for 'gold' history, this pillar is designed to tell the entirety of the region's story after settlement – a story woven through its people and enmeshed in place.

²⁴ In 2023, the City of Ballarat undertook a major piece of strategic work with Melbourne-based brand agency Us+Us to support create an integrated brand identity that established a clear and compelling articulation of our identity, values, and why people should choose our region over other destinations. The strategy and all associated future marketing is intended to reveal Ballarat and its surrounds as a desirable, distinct and multifaceted destination, and to positively reframe how the region is perceived by locals and visitors alike.

Wording from the Ballarat Place Brand Strategic Playbook has been used to shape the SDMP and this LAAP.

Creative Energy

A reflection of our people and what they do best, this pillar showcases the region's creatives, gastronomic innovators, artisan tradespeople, and producers and growers.

Ballarat's diverse range of food and drink wholesalers and retailers, along with the Pyrenees 'wineries and Moorabool's produce growers, highlight the strength of this pillar and the opportunity to continue to expand the range and quality of these experiences.

Midwest Victoria will continue to capitalise on its creative energy pillar which underpins diverse businesses and experiences throughout the region.

Nature at your Fingertips

Midwest Victoria will capitalise on its highly accessible nature-based experiences including bushwalks, mountain and gravel bike trails, and horse riding.

All of the LGAs within Midwest Victoria have nature-based experiences that are easily accessible and offer the potential for expanded trails and tracks to allow walkers, trail runners, cyclists and riders to undertake nature-based experiences that cut across multiple LGAs.

Enablers

The enablers are supporting elements that are important for the development of a sustainable visitor economy. These are not necessarily "ribbon cutting" development projects but include elements such as industry training, marketing, supporting accommodation and hospitality.

Product development focus areas

The product development focus areas are more detailed and build on the strengths of the broader region, linked directly to the product pillars.

This positioning and marketing for Ballarat builds on the latest major research studies to position the city as a highly appealing visitor destination with its strong food and drink offering, its range of major cultural and sporting events, and building on the theme of offering *Brilliantly Unexpected* experiences.

Although it would not be the responsibility of TMV to fund a regional positioning exercise for all the LGAs, it is important that effective linkages are made to this new strategic brand identity to support visitor dispersal across the LGAs along with illustrating the complimentary products and experiences which exist across the Midwest to make it a stronger and more cohesive visitor destination.

Our way of working

The following outlines how we will deliver this LAAP and tourism across the areas of sustainability, accessibility, inclusivity, First Peoples engagement and partnerships, and community wellbeing.

Table 15: Our way of working

Area	How we will deliver this
<p>Sustainability</p> 	<p>Promoting sustainable practices is an essential outcome of this LAAP. This includes identifying ways to minimise negative impacts on the environment, communities and cultures. For the Shire, this will include the following:</p> <ul style="list-style-type: none"> ▪ Encouraging operators to implement sustainable practices including energy-efficient technologies, waste reduction strategies and measuring carbon emissions. ▪ Involving local communities in tourism planning and development to ensure that concerns and needs are understood. ▪ Encouraging wildlife conservation efforts and responsible wildlife viewing. ▪ Ensuring there is respect for local customs and traditions among visitors and cultural sensitivity. This may require providing cultural education and awareness programs to visitors to promote responsible and respectful behaviour. ▪ Implementing strategies to manage and limit the number of visitors in sensitive or ecologically important areas (i.e. carrying capacities). ▪ Developing educational programs for visitors to raise awareness about the environmental, social and cultural impact of their visit. It will also involve providing information on responsible tourism practices and encouraging eco-friendly behaviours. ▪ Encouraging visitors to support local businesses, including locally-owned food and drink providers, makers, creators and retailers. This helps in distributing economic benefits more evenly within the community. ▪ Encouraging the use of sustainable transportation options, such as public transport, cycling, walking and a potential hop-on, hop-off bus. It also involves supporting eco-friendly initiatives like electric vehicles and offsetting carbon emissions through relevant programs. ▪ Encouraging operators to apply for recognised sustainability certifications and standards, such as EcoTourism Australia, EarthCheck, or Rainforest Alliance (by way of example only). Certification programs can help verify and communicate a commitment to sustainable practices. ▪ Encouraging operators to implement effective waste management practices, including recycling and reducing single-use plastics. And encouraging visitors to minimise their waste and educating them on proper disposal methods. ▪ Encouraging or providing ways for visitors to offset their carbon footprint through contributions to carbon offset programs. ▪ Regularly monitoring and evaluating the environmental, social and economic impacts of tourism activities through the Sustainable Tourism Indicators Research. It also involves using this data to make informed decisions, adjust strategies and continually improve sustainability efforts.
<p>Accessibility</p> 	<p>Encourage stakeholders (public and private) to offer experiences, facilities and services that are accessible and enjoyable for individuals of all abilities. This may include:</p> <ul style="list-style-type: none"> ▪ Investing in accessible infrastructure (e.g. the installation of ramps, elevators, accessible bathrooms and other features); ▪ Introducing adaptive technologies (such as audio guides, sign language interpretation services and apps with navigation assistance); ▪ Offering accessible information; and ▪ Collaborating with advocacy groups. <p>This will support the region in becoming a destination of choice for all visitors.</p>

Area

How we will deliver this

Inclusivity



Creating more inclusive experiences involves actively addressing the needs and preferences of a diverse range of visitors. This includes (but is not limited to) people with a disability, those from various cultural backgrounds, LGBTQIA+ visitors and older travellers.

Ways in which the Shire will seek to be an inclusive destination will include:

- Providing a destination that is accessible to people with a disability. This includes education around hidden disabilities, such as recognising the 'sunflower lanyard'.
- Providing cultural sensitivity training for industry to enhance their awareness and understanding of diverse cultures, traditions and customs. This will help in providing respectful and inclusive experiences for visitors from various backgrounds.
- Offering information, signage and services in multiple languages to cater to international visitors. Ensuring the visitors we portray in our marketing materials reflect the diversity of our visitors and the community.
- Developing and promoting events and activities that are inclusive and cater to a wide range of interests and abilities (including options for families, seniors, individuals with disabilities, and various cultural backgrounds).
- Consider the implementation of policies that demonstrate inclusivity and respect for LGBTQIA+ visitors.
- Ensuring that facilities and services are inclusive and respectful of diverse gender identities, including encouraging the availability of all-gender restrooms.
- Promoting diversity in Midwest Victoria's tourism workforce, so that industry can better understand and meet the needs of a wide range of visitors.

First Peoples engagement and partnerships



The region's First Peoples' will guide us to develop and promote tourism experiences that deepen visitor awareness of their living culture and connection to Country. We will ensure this is undertaken at a pace that is acceptable by each First Peoples' group in Pyrenees Shire noting that each group has a different priority for tourism development.

We will:

- Support self-determined First Peoples' plans and priorities.
- Partner with First Peoples' to deliver product in the region.
- Maintain engagement and support with First Peoples' across the region.

Community wellbeing



The growth of the visitor economy can have both positive and negative impacts on community well-being. A sustainable tourism approach, as adopted by this LAAP, aims to maximise the positive contributions while minimising any adverse effects. We will seek to enhance community well-being through the following:

- Consistent and ongoing engagement - An engaged community actively participates in, and benefits from, tourism. Inclusive decision-making processes, local input in tourism planning and opportunities for community members to share their knowledge and traditions contribute to community wellbeing. This LAAP ensures there is engagement with the community at a local and regional level on an ongoing basis.
- Preservation of culture - There needs to be a focus on the preservation and promotion of local cultures, traditions and heritage. Tourism should respect and celebrate the cultural identity of the community. First Peoples must be consulted concerning any initiatives about their community, traditional knowledge and living culture. Support infrastructure development - Well-planned tourism development can lead to improved infrastructure that benefits both residents and visitors. This includes better roads, public spaces, healthcare facilities and utilities, enhancing the overall wellbeing of the community. There are several supporting infrastructure projects in the pipeline for the region (and some currently underway) that should be linked to the tourism sector and actively promoted as such.
- Education and awareness - Community well-being is enhanced when residents are educated about the benefits and challenges of tourism. An awareness program is required in the region to help residents understand the importance of the sector and sustainable tourism practices.



Part 5: Our action plan

Priority local projects

While the SDMP focuses on regional-level initiatives, this LAAP concentrates on those that are within MSC or that fall across the broader Tourism Midwest Victoria region and will require local input for their implementation.

During the LAAP process, a wide variety of initiatives were identified for the Shire. To ensure the LAAP is implementable and realistic, the following are suggested as the priority local projects. These projects have been identified, workshopped, and discussed with community and council. Once these projects are underway, consideration can be given to rolling out additional projects identified.

Project 1: Destination branding exercise

VES Theme Alignment: Branding, Marketing and Resourcing

Undertake a destination branding exercise for the Shire to grow a much clearer destination awareness. Feedback received indicates that currently, the visitor market struggles to understand the value and brand proposition of the Shire.

The brand work should be developed by a professional destination brand developer with strong industry involvement to help ensure buy-in. At this stage, a logical focus for the branding would be the Shire's agritourism and nature-based product.

Project 2: First Peoples' Art Gallery Development

VES Theme Alignment: Arts, Culture and Activation

While there is a strong desire to profile First Peoples more clearly in the tourism narrative of the region, it is important that this is guided and led by the First Peoples across the Shire and broader region. This will ensure that the narrative and experiences created are authentic and unique and that First Peoples are comfortable with the story being shared and undertaken at a time when they are ready to do so.

As identified in the Shire's VES, there is potential to explore the establishment of a First Peoples art gallery through a strong collaboration with Traditional Owners. Such an initiative could establish a fresh arts hub within the Shire, tapping into the rich cultural heritage of the area. Additionally, it would offer a unique attraction distinct from galleries in neighbouring regions.

Project 3: Investment Attraction Strategy²⁵

VES Theme Alignment: Enabling The Visitor Economy

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

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

²⁵ Moorabool Shire Visitor Economy Strategy, page 70.

Project 4: Farmgate Experience Development and Enhancement

VES Theme Alignment: Food, Farmgate and Ferments

The Shire is known for its farm and agri-based operators; however, it can be difficult at times for the visitor to access produce. The opportunity exists to work with farm and agri-based operators to promote value-adding to their operations via the establishment of farm gates, tastings, and other on-farm experiences in Moorabool Shire.

Farmgate experiences offer visitors a chance to connect with the rural environment, gain insights into agricultural processes, and appreciate the efforts involved in food production. They promote local food systems, highlight the importance of sustainable agriculture, and support local farmers and producers.

Project 5: Activation of the Shire's Key Walking Trails

VES Theme Alignment: Nature and Outdoors

The Shire is home to several State parks and forests and offers a large variety of walks and hikes for all levels. While these walks are fantastic assets to have, the opportunity to further activate them exists. Activation of 1 – 2 of the Shire's major trails (such as the popular Lerderderg Track) could include the following.

- Develop a concept plan for a multi-day hike through Lerderderg, connecting Blackwood and Bacchus Marsh. Partner with Parks Victoria to explore the opportunity for temporary accommodation (e.g. glamping).
- Working with private/commercial tour operators to understand what additional infrastructure development may be required to support them operating on the trail.
- Work with hiking tour operators to encourage them to offer guided tours on some trails. These operators enhance the overall experience by providing insights into the local flora, fauna, history, and culture. Additionally, they often provide services such as transportation, gear rental, and packaged tours to make hiking more accessible and convenient for visitors.
- Develop marketing campaigns targeting outdoor enthusiasts, adventure seekers, and nature lovers to promote the hiking trails. Utilise various channels such as social media, websites, travel blogs, and tourism brochures to showcase the unique features and experiences offered by the trails.
- Partner with local accommodations, F&B providers, and other tourism-related businesses to create trekking packages or deals that combine trail experiences with other activities or services, such as accommodation packages, meal deals, or discounts on local attractions.
- Investigate the development of trekking events, festivals, or challenges to attract visitors and generate interest in the trails. These events could include guided hikes, trail

running races, nature walks, workshops, or outdoor festivals featuring local food, music, and culture.

- Look to gauge interest by private providers to offer educational programs or workshops focused on topics related to hiking, outdoor skills, conservation, and sustainable tourism practices on the trails. These programs can enhance the visitor experience and foster a deeper connection to the trails and the natural environment.

Project 6: Bacchus Marsh and Ballan Key Township Activation Strategies

VES Theme Alignment: Enabling The Visitor Economy

The opportunity exists to enhance the aesthetic appeal and functionality of both Bacchus Marsh and Ballan's streetscapes and public spaces to create a more inviting and enjoyable environment for locals and visitors.

Consideration to developing a Township Activation Strategies for each town should be given. This could investigate initiatives such as more landscaping, adding pedestrian-friendly features like walkways and benches, installing decorative lighting, improving signage, upgrading wayfinding, and revitalising historic buildings or landmarks.

These enhancements aim to make the town more attractive to tourists, encouraging them to explore and spend time in the area, thereby boosting local businesses and economic activity.

Figure 19: Bacchus Marsh town centre



Figure 20: Ballan town centre



Priority local project action plan

Table 16 provides the plan for actioning the various priority projects in this LAAP. The actions are non-exhaustive and will continually need to be updated and refreshed over time. Importantly, these local priority LAAP projects have been determined by Moorabool Shire based on input into the regional SDMP, and strategic directions already undertaken by MSC into the local visitor economy.

The timeframes included in the action plan reflect the following:

- Short term: 2024 – 2026.
- Medium term: 2026 – 2030.
- Long term: post 2030.

Table 16: Priority project action plan

Sub-Theme	Recommended Actions	Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
Destination brand positioning exercise	<ol style="list-style-type: none"> 1. Undertake regional audience segmentation research 2. Develop a sub-destination positioning framework 3. Commission a digital asset library 4. Develop an annual strategic marketing plan 	Support activities	<p>A greater understanding of sub-regional markets is achieved.</p> <p>Positioning work is commenced for other Midwest Victoria LGAs.</p>	\$150k ²⁶	TMV (coordination), LGA (funding)	Short-medium term
First People's Art Gallery Development	<ol style="list-style-type: none"> 1. Feasibility study for the development of a First Nations art gallery in Moorabool Shire, undertaken in partnership with Traditional Owners. 2. Identify potential grant funding streams that could be leveraged. 3. If the feasibility study is positive, determine a site and commission concept design work. 	First Peoples Culture, People and Place, Creative Energy	A feasibility study is completed for the gallery to prove viability.	\$150k for feasibility (subject to grant funding)	Traditional Owners, MSC	Medium - Long Term
Prepare an Investment Attraction Strategy to facilitate private-sector tourism investment in Moorabool Shire	<ol style="list-style-type: none"> 1. Undertake an investment attraction strategy and prospectus focusing on gaps in tourism product such as accommodation and food related investment. 2. Deliver information on tourism development in rural areas, including planning-related guidelines to assist investment. 	Product Dependencies	New tourism investment is generated in the Shire.	\$75k strategy and prospectus	MSC	Short Term

²⁶ Sourced via possible grant funding

Sub-Theme	Recommended Actions	Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
Farmgate Experience Development and Enhancement	<ol style="list-style-type: none"> Engage farm and agri-based operators to gauge interest in value-adding to their operations via the establishment of farm gates, tastings, and other on-farm experiences. Identify potential grant funding streams that could be leveraged. Work with operators to enhance and develop business offerings to become 'visitor ready', through delivery of industry training and exploration of funding opportunities for business upgrades. 	Creative Energy, People and Place	New and enhanced farmgate etc. product is introduced.	\$45k (subject to grant funding)	MSC, TMV and farm producers	Short Term
Activation of the Shire's Key Walking Trails	<ol style="list-style-type: none"> Develop a concept plan for a multi-day hike through Lerderderg, connecting Blackwood and Bacchus Marsh. Engage in discussions with private/ commercial tour operators to understand what additional infrastructure development may be required to support them operating on the trail. Engage hiking tour operators to encourage them to offer guided tours on some trails. Develop a marketing campaign targeting outdoor enthusiasts, adventure seekers, and nature lovers to promote the hiking trails. Partner with local accommodations, F&B providers, and other tourism-related businesses to create trekking packages. Investigate the development of trekking events, festivals, or challenges on one or more trails. Gauge interest by private providers to offer educational programs or workshops on the trails. 	Nature At Your Fingertips	<p>Trails are increasingly activated and used by commercial operators.</p> <p>Awareness of the Shire as a walking destination grows.</p> <p>The utilisation of the trails grows.</p>	Trail concept plans and feasibility \$95k	MSC, Parks Victoria	Short – Medium Term

Sub-Theme	Recommended Actions	Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
Bacchus Marsh and Ballan Key Township Activation	1. Undertake township activation strategies for Bacchus Marsh and Ballan with consideration of streetscaping, art installations, lighting installations and placemaking improvements.	Product Dependencies	Township activation strategies are developed and implemented	\$150k township strategies	MSC	Medium - Long Term

Regional projects identified in the SDMP requiring local input

As explained previously, there are several projects identified in the regional SDMP that will require local input to activate or support them. These projects are included in Table 17 and align directly with the SDMP.

The timeframes included in the action plan reflect the following:

- Short term: 2024 – 2026.
- Medium term: 2026 – 2030.
- Long term: post 2030.

TMV and the various councils of the region will need to agree on an equitable formula for funding the various regional DMP

projects which benefit all of the shires within the region. Consideration could be given to a per capita model to reflect the wide-ranging population/ratepayer base of the various shires within the Midwest region. There may also be other models which already exist and which apply to other industry sectors of the regional economy.

As all of the five councils that are fully or partially within the Midwest region are beneficiaries of the various SDMP regional projects identified, it is important that they share the costs and benefits expected to occur.

Table 17: Regional projects identified in the SDMP requiring local input

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
1.1	Advocacy	<ol style="list-style-type: none"> 1. Develop a SDMP Advocacy Plan with stakeholder identification, advocacy principles and advocacy priorities 2. Coordinate advocacy via TMV 	Support activities	The DMP is activated, reviewed and managed.	-	TMV, All LGAs	Short term
1.3	Crisis management	<ol style="list-style-type: none"> 1. Develop TMV Crisis Management Plan 2. Provide Industry Resilient Ready/Crisis Preparedness Program 	Guiding principles	<p>Plans are activated to appropriately respond to emergency, crisis and climate-related events.</p> <p>The industry is prepared and has mitigation strategies in place.</p>	\$25k	TMV, All LGAs	Annually
1.4	Funding	<ol style="list-style-type: none"> 1. Develop a Grants and Funding Strategy 2. Match priority projects to grant funding schemes 3. Determine specific project leads for grant applications 	Support activities	External funding is secured for Priority Projects identified in the SDMP Annual Action Plan.	\$50k	TMV, All LGAs	Short term
1.8	TMV resourcing	<ol style="list-style-type: none"> 1. Advocate for TMV centralised tourism model 2. Advocate for centralised resourcing 	Support activities	Improved resourcing for tourism is achieved.	\$50k in total (MSC, PSC, HSC, GPSC) \$150k from BCC specifically.	TMV, All LGAs	Short term

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
2.3	Commitment to sustainability	1. Demonstrate TMV's commitment to sustainability through the development of a Tourism Sustainability Plan (which incorporates sustainability benchmark research)	Guiding principles	Destination stakeholders lead the industry with positive impact policies, initiatives and actions.	\$40k	TMV, All LGAs	Medium – long term
2.7	Visitor servicing	1. Develop a Regional Visitor Servicing Strategy and Action Plan	Support activities	Visitor servicing is aligned across the region and to future trends.	\$50k	TMV, All LGAs	Short term
3.1	Arts, culture and heritage experience trail development	1. Audit and implement an arts, culture and heritage trail connecting various signature products throughout the region	Creative Energy, First Peoples Culture, People and Place	Signature arts, culture and heritage products throughout the region are better connected and promoted to drive visitor awareness, demand and dispersal.	\$85k	TMV, All LGAs	Medium – long term
3.2	Food and drink experience development	1. Audit and implement a food trail connecting signature food and drink experiences throughout the region 2. Regional Agritourism 'Visitor Ready' Program to support new and existing agritourism businesses to become visitor-ready	Creative Energy, People and Place	Awareness of the region as a high-quality food and drink destination grows, leveraging signature food and drink experiences.	\$100k	TMV, All LGAs, food and drink operators, Agri-Tourism operators	Medium term
3.4	Nature at your Fingertips experience development	1. Complete a tourism opportunities study to identify a signature eco-tourism experience that strengthens the brand identity 2. Ongoing investment in walking and cycling trails and shared pathways	Nature at your Fingertips, Creative Energy, Product dependencies	Experiences are developed that align with the Nature at your Fingertips pillar and assist in delivering our targets.	\$75k	TMV, All LGAs, Parks Victoria	Short – medium term

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
3.5	Night-time economy	1. Consider a TMV night-time economy plan that identifies intervention concepts for night-time economy precincts, understanding barriers to after-hours activity (including zoning and compliance)	Creative Energy, People and Place	The night-time economy is activated in selected precincts, helping to drive economic growth, enhance cultural and social experiences and create a more dynamic and inclusive community.	\$35k	TMV, All LGAs	Medium term
3.6	Planning frameworks advocacy and support	1. Undertake a Tourism Planning Zone Study 2. Undertake amendments to planning schemes where required	Support activities, Product dependencies	Barriers to tourism development are more clearly understood and a pathway to resolve these is worked towards.	\$150k	TMV, All LGAs	Medium – long term
3.7	Supporting self-determined First Peoples opportunities	1. Support self-determined First Peoples plans and priorities 2. Partner with First Peoples to deliver the product in the region 3. Maintain engagement with First Peoples across the region	First Peoples Culture, People and Place	Ongoing relationships built with First Peoples.	-	TMV, All LGAs, Traditional Owners	Medium term
3.8	Unique quality accommodation	1. Conduct a detailed regional accommodation audit including the supply of rooms/bookable units 2. Undertake a detailed Accommodation Opportunities and Investment Study with a supporting investment prospectus.	Product dependencies, People and place	Appropriately scaled accommodation that is driving demand for the destination and/or supporting longer visitor stays is developed.	\$45k	TMV, All LGAs	Medium term

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
4.1	Accessibility	<ol style="list-style-type: none"> 1. Complete a regional accessibility audit 2. Encourage tourism businesses to undertake training in accessibility needs (including how this can enhance revenue, via case study examples) 3. Develop a promotional campaign profiling the region as an accessible community and leisure destination. 	Product dependencies, Guiding principles	The region is positioned as one of Victoria's most accessible tourism destinations.	\$50k	TMV, tourism businesses	Ongoing
4.2	Connected public transport	<ol style="list-style-type: none"> 1. Investigate the development of a Hop-On/Hop-Off Transport Shuttle Business Case 2. Advocate for public and private transport connections 3. Undertake electric vehicle industry advocacy 	Product dependencies, Guiding principles	A connected transport network is available, enabling visitors to travel to destinations with or without a private vehicle.	\$65k	TMV, All LGAs, attraction operators	Short - medium term
4.4	Events infrastructure	<ol style="list-style-type: none"> 1. Complete Regional Events Facility and Assets Audit 2. Undertake Regional Business Events Venue Feasibility Study 	Product dependencies	Identification of suitable viable event venues.	\$100k	TMV, All LGAs	Medium -longer term
4.5	Integrated transport planning	<ol style="list-style-type: none"> 1. Influence and provide advice on Local Government Integrated Transport Plans 	Product dependencies, Guiding principles	More aligned transport planning resulting in visitors being able to get to and around the region without a car or paid tour.	n/a	TMV, All LGAs	Ongoing
4.6	Investment attraction	<ol style="list-style-type: none"> 1. Create a TMV Investment Attraction Strategy and Prospectus 2. Continue major project masterplan and funding advocacy 3. Advocate for increased worker attraction in the region 	Support activities	Private and public sector investment into priority projects identified within this SDMP.	\$85k	TMV, All LGAs	Short term

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
4.9	Signage and wayfinding	<ol style="list-style-type: none"> 1. Complete a Regional Wayfinding and Signage Strategy and Framework 2. Implement and complete the Goldfields Gateways Project 3. Incorporate digital storytelling and visitor servicing into new signage and wayfinding projects 	Product dependencies	Visitor and local navigation and interpretation of the region are improved.	\$100k	TMV, All LGAs	Medium term
4.10	Tracks and trails	<ol style="list-style-type: none"> 1. Develop a Regional Tracks and Trails Network Masterplan (inclusive of walking, cycling, horse-riding and high-usage trails) 	Product dependencies, Nature at your Fingertips	Tracks and trail planning are integrated and coordinated moving forward.	\$80k	TMV, Parks Victoria, All LGAs	Medium term
5.1	Destination-driving events	<ol style="list-style-type: none"> 1. Develop a region-wide Tourism Events Strategy 2. Promote opportunities for food, produce and drink events. 3. Develop a program that promotes local produce and farmers' markets 4. Identify arts and culture-based events that can occur across the region. Focus on those that can run for longer periods and activate the night-time economy 5. Support literary & cultural events 6. Develop a major cycling event. 	Signature Experiences, Creative Energy, People and Place, Nature at your Fingertips	Destination-driving events are growing the profile of Midwest Victoria and delivering on our product pillars.	\$200k	TMV, All LGAs	Medium term

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
6.1	Enhancing capacity to deliver meaningful experiences	<ol style="list-style-type: none"> 1. Review and action the Grampians Workforce Development Strategy 2. Including affordable housing. Workforce attraction, desirability of careers in industry and calibre of workforce 3. Consider a Workforce Planning Promotional Campaign 4. Investigate the development of a food and beverage roster. 5. Offer annual TMV product development programs 	Support activities	Workforce availability to meet demand and any seasonality changes.	\$100k	LGAs Industry State Givt TMV	Short-medium term



Part 6: Appendices

Appendix 1 Survey – Local Insights

38 Responses

- A survey was distributed over 5 weeks to the community and industry throughout the Tourism Midwest region.
- The survey received **201** responses in total.
- Moorabool Shire generated **38** responses in total.
- Overall, the sample size for the total Tourism Midwest Region was robust, achieving a 95% confidence level and a 7% margin of error
- The sample size for the Moorabool Shire Survey was also robust, achieving a slightly lower confidence level of 85% and a 12% margin of error.

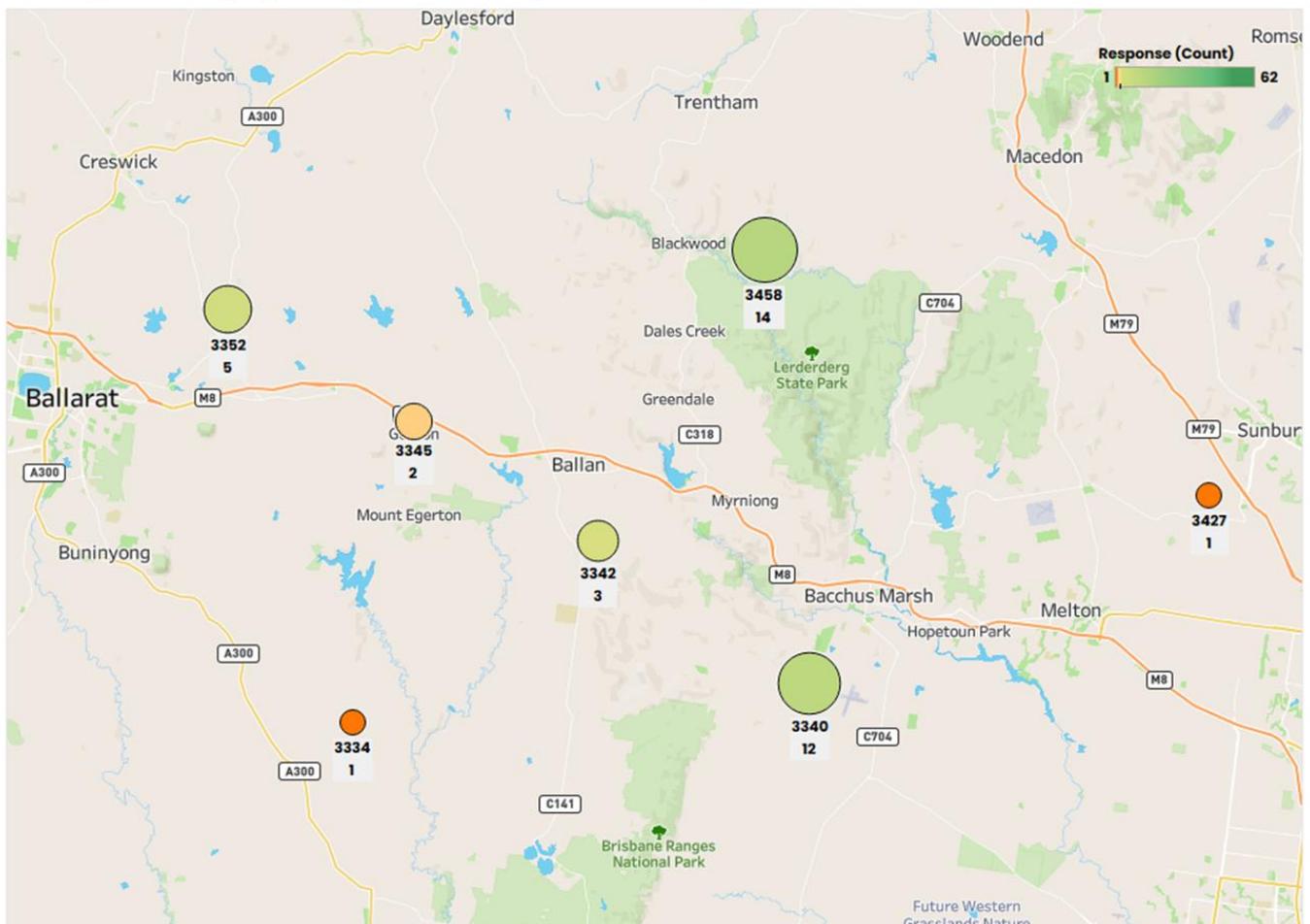
Question 1

What Council area do you primarily associate with?

Question 2

- A good representative spread of post codes was achieved
- Understandably major towns got a greater share
- We will continue to engage with communities and industry throughout the process to encourage wide involvement
- Considering that several LGAs felt their industry and community were over-surveyed in recent times, the response rate and spread is impressive

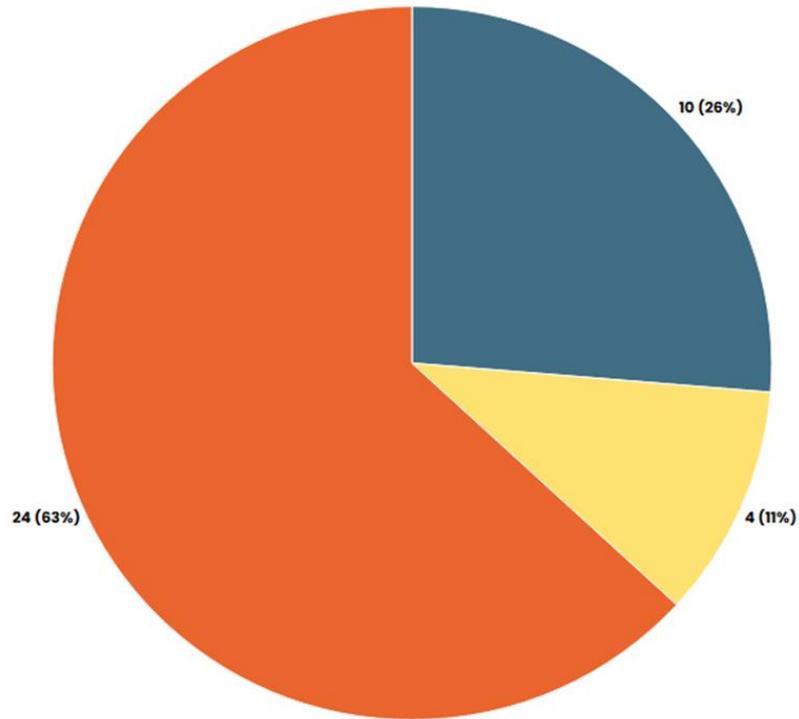
2. What postcode do you primarily associate with? (Moorabool Shire)



Question 3

- A much higher proportion of community responses compared with other areas
- But a third were business representatives

3. In what capacity are you completing this Survey? (Moorabool Shire)



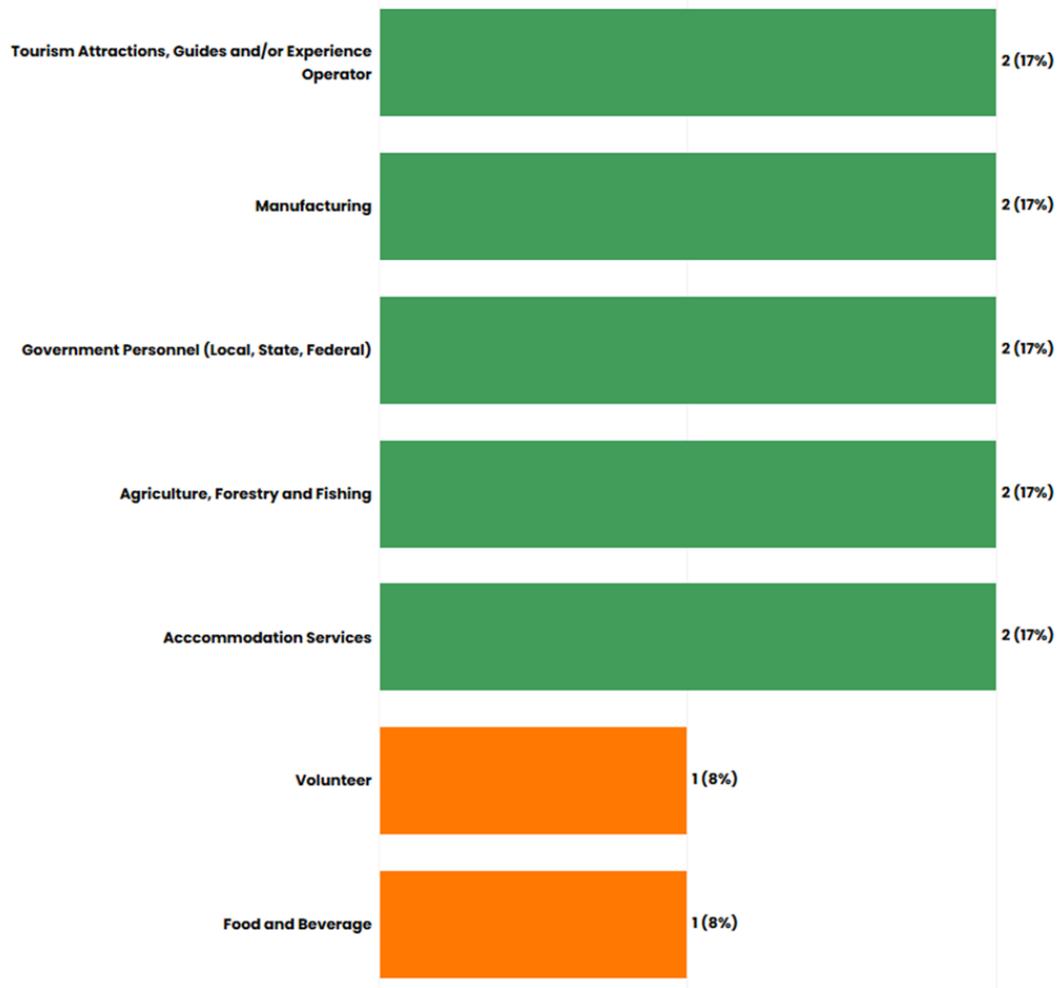
Response

- Business representative (and also as a resident in the region)
- Business representative (but not a resident in the region)
- Interested community member or volunteer

Question 4

- A much higher proportion of community responses compared with other areas.
- But a third were business representatives.

4. What best describes your business/organisation (Moorabool Shire)



Question 5

- Responses indicate the importance of social media in promoting businesses
- 12% promote via digital marketing and 9% via online business directory
- Only 3% of businesses are listed on the Australian Tourism Data Warehouse. Good to get this increased
- 3% noted they also promote via the Tourism Midwest Partnership. Good to grow this

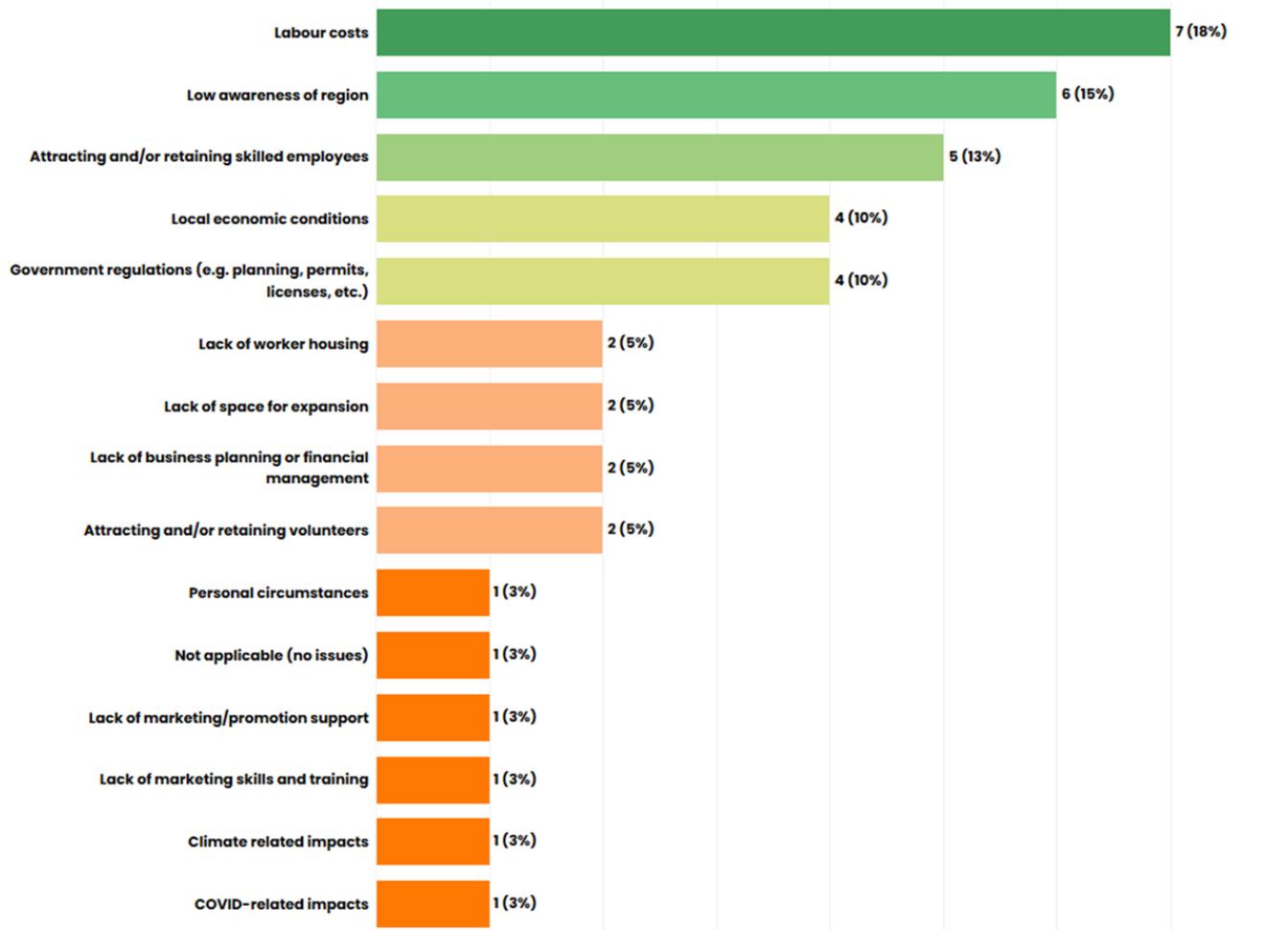
5. How is your business/organisation primarily promoted? Select all that apply. (Moorabool Shire)



Question 6

- Responses indicate the importance of social media in promoting businesses.
- 12% promote via digital marketing and 9% via online business directory.
- Only 3% of businesses are listed on the Australian Tourism Data Warehouse. Good to get this increased.
- 3% noted they also promote via the Tourism Midwest Partnership. Good to grow this.

6. What issues is your business/organisation facing? Select all that apply. (Moorabool Shire)



Question 7

- Unlike the other areas improved way-finding was the major key outcome noted
- Similar to other areas support for smaller towns was high on the list
- Many want to see new attractions established
- Town centre improvements were noted
- An increase in annual visitation also rated highly

7. What are the key outcomes that this Destination Management Plan should focus on? Select all that apply. (Moorabool Shire)



Question 8

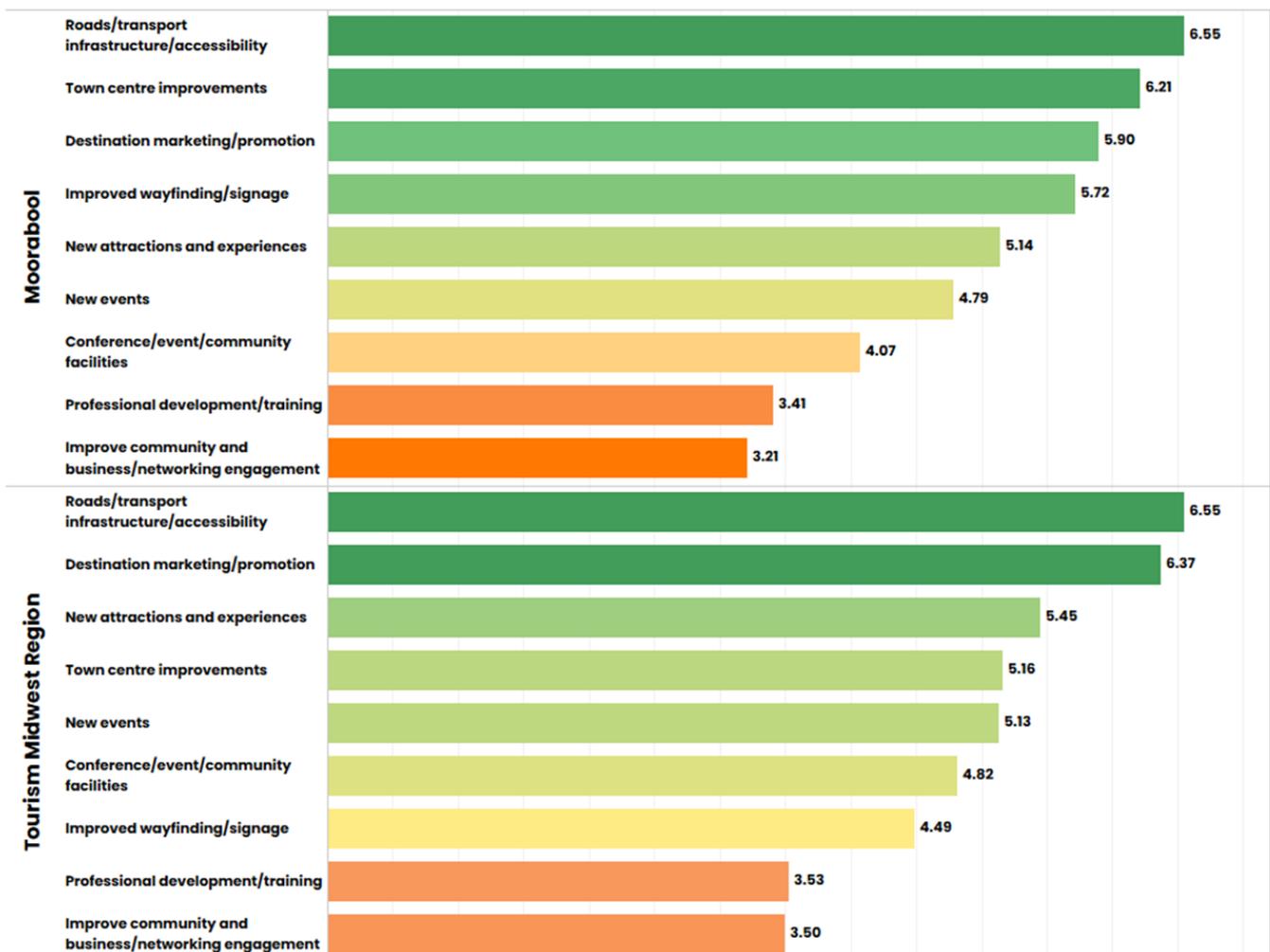
8. If there was one project that deserved priority over others to improve tourism to the region, please provide details below, including a preferred location (Ballarat)

- More accommodation in Bacchus Marsh
- More dining options in Ballan
- Placemaking and Wayfinding
- Signage and promotion of the towns
- Suitable venues for business events within Bacchus Marsh.
- Greater artistic displays within the whole region.

Question 9

- The biggest improvement noted was for road infrastructure and public transport
- Improve town centres and walkability, signage, parking, lighting, landscaping
- Followed by stronger destination marketing
- Improve wayfinding and signage
- Introduce new attractions and experiences
- Create new events

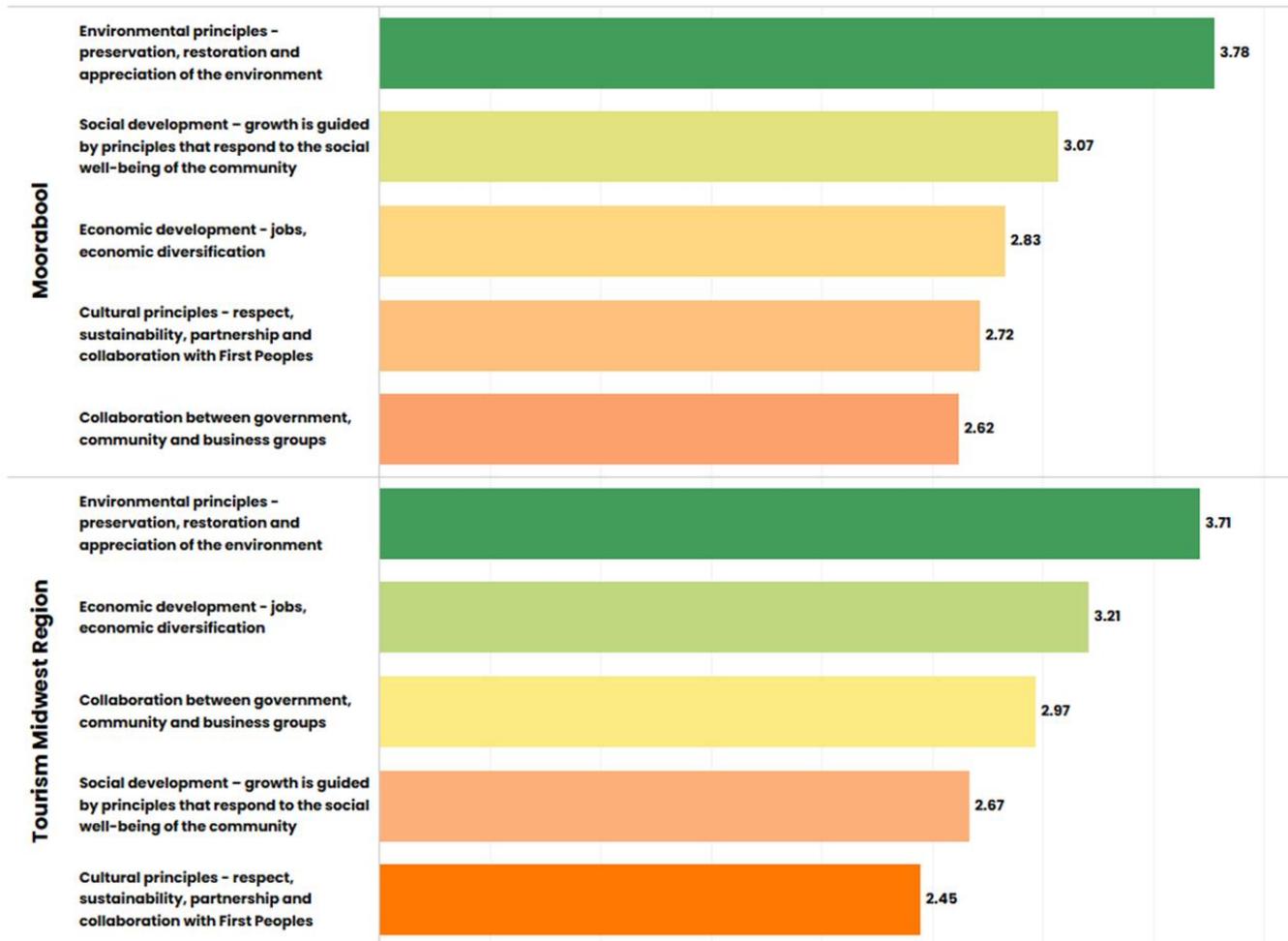
9. Please rank the items requiring attention in the region. (Moorabool & Tourism Midwest Region)



Question 10

- Environmental considerations rated highest which was the same for most areas
- Social development was rated more highly than other areas
- Economic development and jobs were next
- First Peoples partnerships and collaboration required
- Stronger collaboration between public, private and community stakeholders

10. Please rank what core values/guiding principles you think should guide sustainable tourism development in the Tourism Midwest. (Moorabool & Tourism Midwest Region)



Appendix 2 Glossary

BCC	Ballarat City Council
CALD	Culturally and Linguistically Diverse
CAPEX	Capital Expenditure
CBD	Central Business District
COVID-19	Coronavirus disease
DEECA	Department of Energy, Environment and Climate Action
DJSIR	Department of Jobs, Skills, Industry and Regions
DMP	Destination Management Plan
F&B	Food and Beverage
GDP	Gross Domestic Product
GPSC	Golden Plains Shire Council
HSC	Hepburn Shire Council
HVTs	High Value Travellers
IVS	International Visitor Survey
LAAP	Local Area Action Plan
MSC	Moorabool Shire Council
NPS	Net Promoter Score
NVS	National Visitor Survey
PCG	Project Control Group
PSC	Pyrenees Shire Council
RDV	Regional Development Victoria
REDS	Regional Economic Development Strategy
RTB	Regional Tourism Board
SDGs	Sustainable Development Goals
TMV	Tourism Midwest Victoria
TRA	Tourism Research Australia
UN	United Nations
VES	Moorabool Shire Visitor Economy Strategy
VEP	Visitor Economy Partnership
VFR	Visiting Friends and Relatives
VTIC	Victoria Tourism Industry Council
YE	Year End

Appendix 3 Experience Victoria 2033 Product Priorities and Settings

Figure 21: Experience Victoria 2033 Product Priorities and Settings²⁷

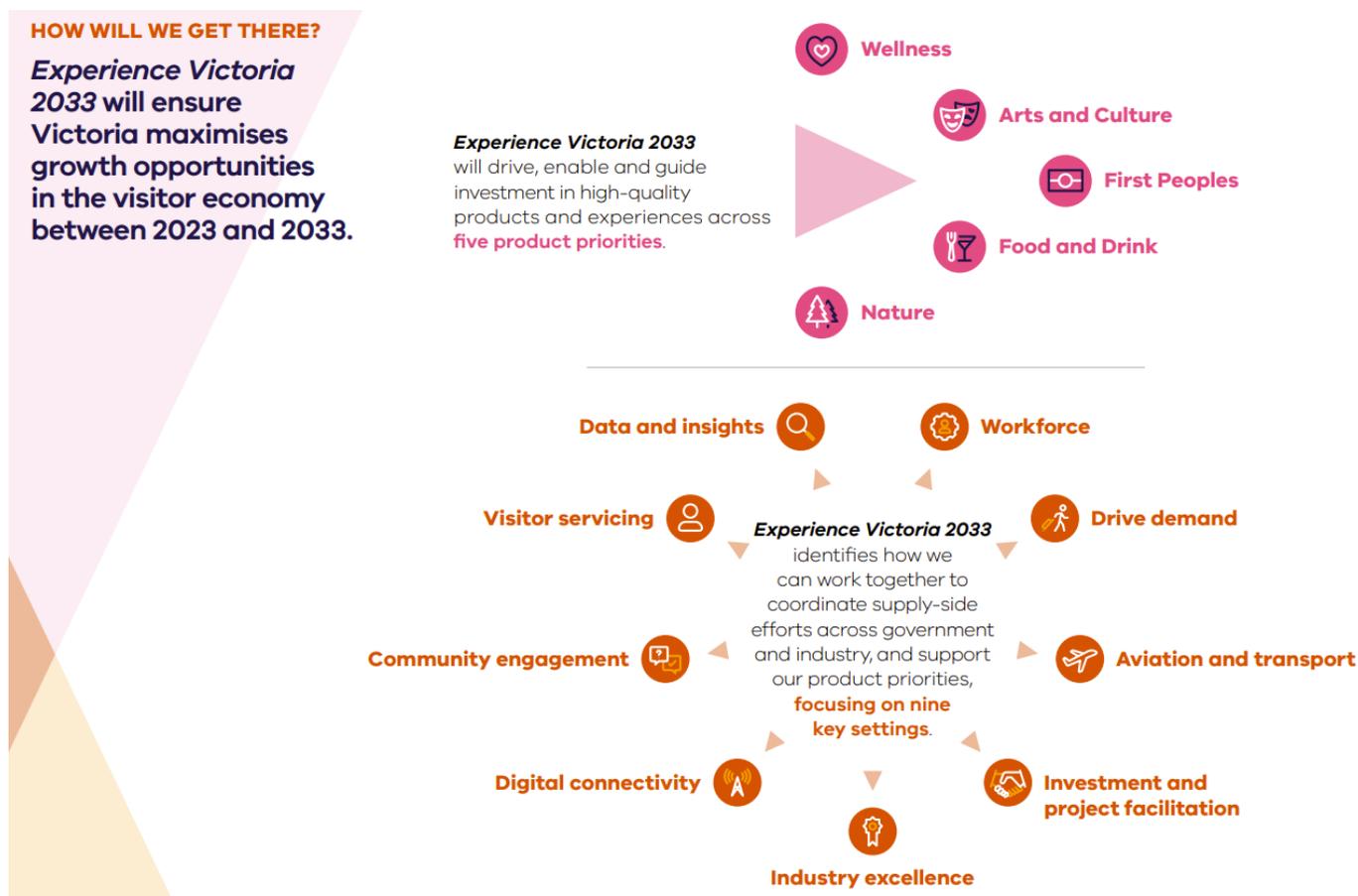


Table 18: Experience Victoria 2033 Product priorities and settings, and alignment with Midwest Victoria

Experience Victoria 2033 Product Priorities and Settings	Current Strengths for the Midwest	Emerging Strengths for Midwest	To be Worked On
Wellness		✓	
Arts and Culture	✓ (Culture & Heritage)	✓ (Arts)	
First Peoples		✓	
Food and Drink	✓ (Food)	✓ (Drink)	
Nature		✓	
Workforce	✓		
Drive Demand	n/a	n/a	n/a
Aviation and Transport		✓	
Investment and Project Facilitation			✓
Industry Excellence		✓	
Digital Connectivity		✓ (regional areas)	
Community Engagement	✓		
Visitor Servicing	✓		
Data and Insights		✓	

²⁷ Experience Victoria 2033, page 9.

Appendix 4 Visit Victoria Brand Playbook

Figure 22: Regional sub-brand framework – Goldfields²⁸

Regional sub-brand framework			
Goldfields			
Visitation drivers	Escape my everyday	Surprise and delight me	Spark my imagination
Victorian Masterbrand promise Goldfields sub-brand promise	Enrich every moment in Victoria's rich heartland		
Pillars	Nature at your fingertips <ul style="list-style-type: none"> Lakes Hikes and bushwalking trails Gardens 	Passion for quality <ul style="list-style-type: none"> UNESCO Creative City in the area of Craft and Folk Art, Ballarat UNESCO Bendigo city and region of gastronomy Premium food and drink experiences Wine region and cellar doors Artisans Attractions 	Storied culture <ul style="list-style-type: none"> Post-colonial history and architecture and early Chinese culture First Peoples cultural experiences Villages and towns Art galleries and cultural institutions
Proof points	<ul style="list-style-type: none"> Lake Wendouree, Lake Weeroona Mount Buninyong, Mount Alexander Regional Park, La Larr Ba Gauwa Mountain Bike Park The Goldfields Track Pink Cliffs Geological Reserve Rosalind Park 	<ul style="list-style-type: none"> Masons, Wine Bank of View, Percy and Percy, Long Paddock Cheese, Cabosse and Fève Chocolates, Hop Temple, Restaurant Lola, Mr Jones, Mitchell Harris Wine Bar Shiraz Republic, Vinea Marson, Balgownie Estate, Blue Pyrenees Estate, Michael Unwin Wines Lost Trades Fair, Bendigo Pottery, Wooten White Night, Winter Wonderlights 	<ul style="list-style-type: none"> Djaara Lights Bendigo, Ballarat, Castlemaine Heathcote, Bridgewater on Loddon, Harcourt, Talbot Bendigo Art Gallery, Art Gallery of Ballarat, Castlemaine Art Gallery The Great Stupa of Universal Compassion
Personality traits	Open-minded	Creative	Intriguing

²⁸ Destination Victoria Brand Strategy, page 24.

Appendix 5 NPS calculation

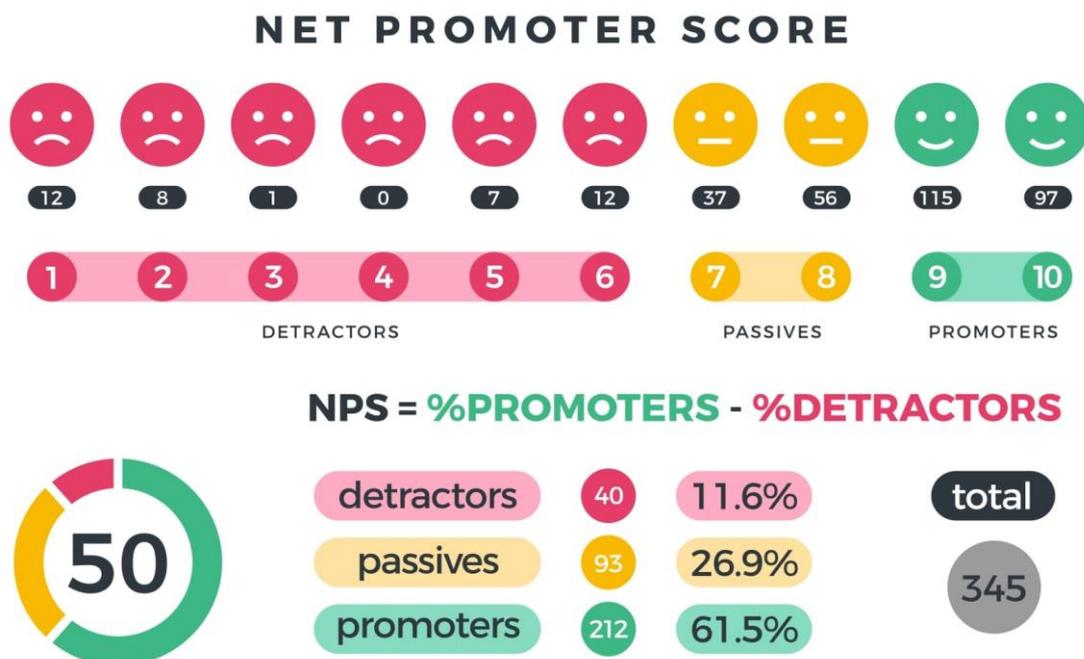
To undertake a top-line assessment of the quality of a region’s product offering, the Net Promoter Score (NPS) metric can be used. This is a measurement of consumer loyalty. In a tourism context, this translates to a visitor’s willingness to not only return for another stay but also make a recommendation to their family, friends and colleagues. NPS scores are reported with a number from -100 to +100, with a score above 30 considered good and a score above 50 considered excellent.

The NPS is calculated using a scale (see Figure 23):

- a score between 0-6 is considered unhappy customers who are unlikely to return and may even discourage others from staying with the provider
- a score between 7-8 being passives, meaning they are satisfied with the provider but not happy enough to be considered promoters
- a score between 9-10 is considered promoters who are typically loyal and enthusiastic customers and who are likely to return and strongly promote the provider.

Tripadvisor and Google²⁹ use a scale of 1-5 for consumer ratings on accommodation products. Converting this to the NPS scale means that a rating of 1-3 is considered “detractors” for the product, a score of 4 is the product’s “passives” and a score of 5 is the product’s “promoters”.³⁰ Only product with more than five reviews was included in the NPS assessment to ensure a robust sample size.

Figure 23: Net Promoter Score scale



²⁹ Booking.com has not been used to derive a NPS because it does not provide a scale of scores, but rather, only provides an overall score. Therefore, an NPS is unable to be calculated from Booking.com listings.

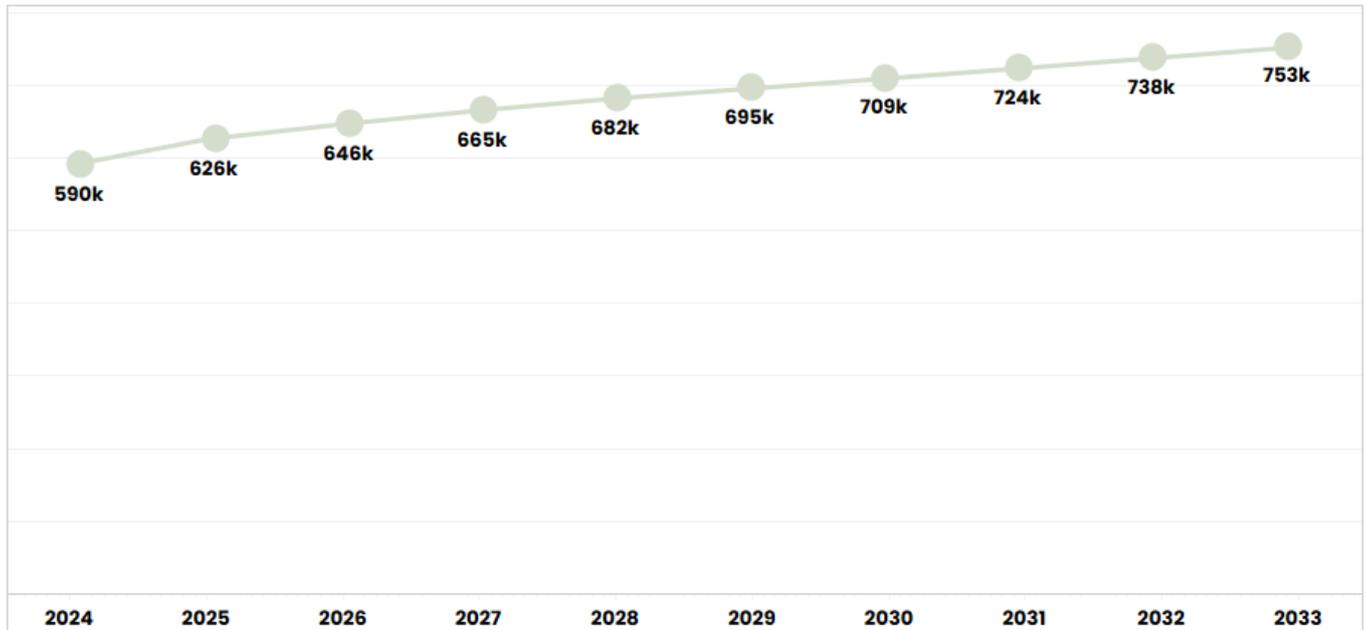
³⁰ <https://birdeye.com/blog/net-promoter-score-explained/>

Appendix 6 Visitor forecasts

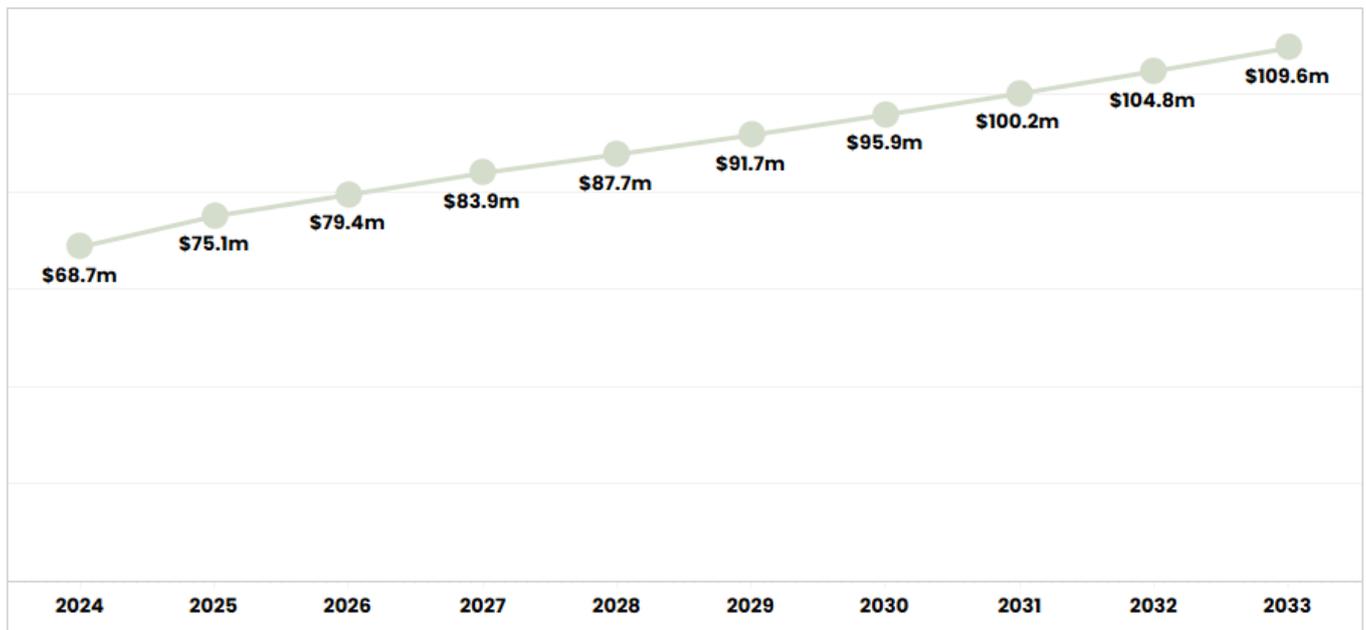
The following provides forecasts for visitor trips and spending to MSC from 2024 to 2033. The forecasts have been aligned with the tourism forecasts for Victoria³¹.

Figure 24: Visitor forecasts, 2024–2033³²

Visitor forecasts



Visitor spending forecasts



³¹ Tourism Forecasts for Victoria, Department of Jobs, Skills, Industry and Regions (https://tourism.vic.gov.au/_data/assets/pdf_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf)

³² Derived by Stafford based on historic data from Tourism Research Australia (National and International Visitor Surveys) and COVID-19 recovery forecasts.

