DAYLESFORD MACEDON TOURISM DESTINATION MANAGEMENT PLAN

2024-2029

FOR THE SHIRES OF HEPBURN & MACEDON RANGES

SUMMARY

DAYLESFORD MACEDON TOURISM urban conomics tourism enterprise

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EXECUTIVE SUMMARY

KEY FINDINGS

The Daylesford Macedon Ranges region is serene and scenic, encompassing both Hepburn Shire and Macedon Ranges Shire.

The Daylesford Macedon
Ranges Destination
Management Plan has
been prepared to provide
a strategic and unified
direction to grow and nurture
a strong visitor economy in
the region over the next 5
years.

• Overnight visitor spend is almost 4 times more than daytrip spend.

• Daytrip visitors are spending the same as the State average, whilst overnight visitors are spending slightly more than the State average.

• Visitation is balanced across the two LGA areas.

• 2022 visitation exceeded 2019 visitation.

• Traditional accommodation is significantly overshadowed by short stay rentals.

Spring is the most popular time for day trip visitors yet it is the least popular
for overnight visitors alternatively winter is the lowest for daytrip visitors but
the highest season for overnight visitors.

• Overwhelmingly the strongest target market is adult couples at 52%.

 Emerging competitors in spa and wellness in other regions of Victoria are forcing the need to make improvements and diversify the product and experience offering in the Daylesford Macedon Ranges region.



VISION

THE DAYLESFORD MACEDON RANGES REGION IS RECOGNISED AS VICTORIA'S LEADING REJUVENATION DESTINATION.

This vision evolves and refreshes the wellness theme that the region has held for many years. Rejuvenation is **the act of making something newly fresh or full of energy**.

OBJECTIVES Drive regional dispersal Promote sustainable Facilitate partnerships and approaches to tourism by using an itinerary support emerging industry based approach to raise with consideration leaders. awareness of the region's of economic viability, product and experiences environmental protection and link townships and and social equity. products. Embrace the competitive Encourage a continuous Recognise that advantage of seasonality improvement approach to rejuvenation is an to generate dispersal, product and experiences individual experience return visitation and to development, prioritising and that visitors will seek capture new audiences. high quality and high-yield out products aligned to rejuvenation offering. their interests (e.g. food and beverage, wellness, nature, arts).

Daylesford Macedon Tourism DMP Summary

STRATEGIC PILLARS

Six strategic pillars and goals have been identified for the Destination Management Plan. These are the focus areas that will enable the region to achieve the vision and objectives.



Invest in Nature and Rejuvenation Product

Invest in competitive, demand driving rejuvenation products and nature experiences that will elevate the region's reputation and desirability.



Elevate Food and Drink

Deliver high-quality, contemporary and authentic regional food and drink experiences, and use this product to ignite an engaging night-time economy.



Develop Heritage and Culture Experiences

Showcase and celebrate local heritage and culture to provide a rich visitor experience.



Celebrate the Arts

Unearth the existing arts and creative offering to enhance the visitor experience within the region.



Strengthen Industry and Enhance Infrastructure and Connectivity

Mobilise industry by encouraging collaboration, whilst advocating the value of tourism, importance of infrastructure and need for connectivity to support the region.



Reinforce and improve the Daylesford Macedon Ranges region brand through strategic marketing and positioning.

TARGETS

The Daylesford Macedon Tourism Destination Management Plan looks to meet key targets over its 5-year lifespan. The plan sets the vision for the region to be recognised as the leading destination for rejuvenation. Many of the priority projects aim to convert day trip visitors (directly or indirectly) into overnight visitors, thus increasing the yield for the region.

To achieve and measure the success of this vision, DMT will use the following criteria:

Measure

Target over 5 year period



Level of investment in the visitor economy

Tracking the number of downloads and clicks to the online investment prospectus will be reported with a target of 100 downloads per year.

Assuming a success rate of 5% the region will strive for 5 new businesses each year.



Length of stay

Increase length of stay from 2.4 to 2.7 nights to meet the regional Victoria average length of stay.



Total visitation

Increase total visitation to 4.2 million visitors by 2029.

- Grow annual visitor numbers to the region by 3% to represent an additional 124,000 per annum
- Increase overnight visitation by 264,600 to represent a 5% increase per annum



Visitor spend

Increase value of visitor economy to \$1.12 billion by 2029.

- Increase day trip visitor spend from \$142 to \$236 by 2029
- Increase overnight visitor spend from \$538 to \$757 by 2029



Number of jobs

Increase number of tourism jobs in the region from 5,000 to 6,000 by 2029 to rectify jobs decline and meet the pre-COVID average annual growth rate of Victorian tourism jobs.



Visitor satisfaction

An annual visitor survey will be undertaken by the RTB/VEP with a total net promoter score of 25 in year 1 and annual results exceeding this by 10% year on year.

DESTINATION MANAGEMENT PLAN

Daylesford Macedon Tourism has developed a Destination Management Plan for the Daylesford Macedon region, to guide the growth of the visitor economy over the next 5 years (2024-2029). Urban Enterprise has been engaged to create the Destination Management Plan and Local Area Action Plans (LAAPs) for Hepburn Shire and Macedon Ranges Shire.

Daylesford Macedon Tourism (DMT) is the peak tourism organisation for the Daylesford Macedon Ranges region, responsible for providing overarching tourism strategy and services to guide development of the visitor economy. The Local Government Areas (LGAs) that comprise the Daylesford Macedon Ranges region are Hepburn Shire and Macedon Ranges Shire Council.

This Destination Management Plan (DMP) has been developed through the application of best practice principles. A rigorous process of research, in-depth stakeholder engagement and assessment was undertaken to inform the DMP. Through the stakeholder engagement the outcomes for the DMP were sought and industry confirmed they wanted to see improved visitor amenities, increased visitation, town centre improvements, promotion and marketing and improved wayfinding signage for visitors as outcomes of the DMP.







Daylesford Macedon Tourism DMP Summary







Proportion of Daylesford Macedon Ranges Region Visitor Market

Who They Are

Product

Adult Couples

52%

- Solo Couples
- Queer Couples
- CALD Couples

- Food & Beverage
- Wellness
- Accommodation
- Arts & Creative
- Nature

Groups
Without
Children
24%

- Girl Weekends
- Couples travelling with other couples
- Interest groups (cyclists, bikies)
- Queer groups of friends
- CALD couples
- Outdoor traveller groups
- Food & Beverage
- Wellness
- Accommodation
- Arts & Creative
- Nature
- History & Culture

Family
With Children
12%

- Families
- Outdoor travellers
- CALD community

- Nature
- Arts & Creative
- History & Culture

Solo

- Outdoor travellers
- VFR
- Digital nomad

- Nature
- Food & Beverage
- Wellness
- Accommodation

Daylesford Maradon Taylism DMDS

PRODUCT STRENGTHS AND GAP ANALYSIS

The Daylesford Macedon Ranges region has appeal to a range to visitor audiences based on the regions product strengths - nature, food and drink and wellness. Many of which are linked through a connection to water - mineral water, spas, lakes and waterfalls.

Product Gaps

Product Opportunities

Target Market



Wellness product investment

- Refresh, refine and elevate the wellness-based experiences
- Develop a high-end wellness retreat or mineral springs resort
- Adult couples
- Groups without children
- Solo



Opening hours of food and drink operators, especially mid-week and evening

- Develop experiences which link multiple businesses
- Adult couples
- Groups without children
- Solo
- Family with children



- First Peoples product and experiences available for visitors
- Post settlement historical experiences (e.g. museums and interpretation) need investment
- Build immersive First Peoples experiences
- Adult couples
- Groups without children
- Solo



- A consistent high-quality events calendar, with seasonal large and small events, is missing
- Lack of hands on, arts based bookable experiences for visitors (e.g. learn to draw botanic art or pottery classes)
- Elevate the arts experiences and make them more accessible to visitors
- Continue to build on the existing calendar of arts and culture events and promote collectively across the entire region
- Adult couples
- Groups without children
- Solo



- First Peoples product offering and interpretation throughout the region
- Challenges with the management and maintenance of tracks and trails on public land
- Develop Eco-tourism products
- Explore certification/ accreditation as an ECO Destination or other like accreditation
- Adult couples
- Groups Without children
- Solo
- Family with children



DESTINATION PERCEPTION

To understand the Australian population's perception of the Daylesford Macedon Ranges Region, Urban Enterprise asked 106 individuals who had not yet gone to the region what they think the Daylesford Macedon Ranges region is known for.

The majority of respondents noted the region's wineries, distilleries and breweries as the highest (66%). Whilst wellness/day spa wasn't the highest noted characteristic of the region, it was still highly recorded with 61%, followed by the perception that the region hosts quality food (50%).

The region was also perceived to be popular due to its natural assets, as the mineral springs (48%) and waterfalls and nature (48%) were recorded in the top 5 elements of the region.



FORECAST DAYLESFORD MACEDON RANGES REGION GROWTH

Visitation projections forecast that the Daylesford Macedon Ranges region will see an additional 621,300 visitors over the next 5 years (2024-2029), with visitation expected to reach 4.2 million by 2029.

The Daylesford Macedon Ranges region is expected to see a 356,700 growth in daytrip and 264,600 overnight visitors by 2029.

Introducing new products and improvements to the visitor experience in the region, elevating the marketing presence for the region and obtaining public and private investment will impact the forecast and see a higher and faster growth in visitation and overnight stays. For example increasing the bed inventory with the development of a new boutique hotel in the west and a tourist park in the east will have significant impact in the visitation projections.

+4.2 MILLION

VISITORS TO THE DAYLESFORD MACEDON RANGES REGION BY 2029



LEVERAGING EXISTING REGIONAL VISTATION

Key to growing the visitor economy for the Daylesford Macedon Ranges region will be to leverage the regional visitor markets that are from or already travelling to surrounding municipalities. This accounts for over 10.5 million visitors to the area.

Additionally, there are approximately 794,600 residents in surrounding regional local government areas that provide a visitor base for the region. This includes the City of Greater Bendigo, City of Ballarat and Mitchell Shire.

Attracting residents from surrounding population centres will also be crucial to attracting visitation, and provides an important market for the region.

10.5 M 795K

VISITORS TO

POPULATION IN

THE SURROUNDING MUNICIPALITIES

MARKET DEMAND FOR ACCOMMODATION

In preparing the DMP, Urban Enterprise undertook quantitative market research of visitors to the Daylesford Macedon Ranges region via an online survey. The following data relates to information derived from 604 respondents, who shared their accommodation experience while in region.

When asked if the respondents stayed in their preferred accommodation, 8% (46) responded with no. When asked what accommodation they would prefer to stay in, it was clear that there is a preference for boutique accommodation and hotels combined 53%.

This demonstrates that expanding and diversifying the accommodation offering is essential for increasing visitation and yield in the region. Key accommodation preferences include boutique accommodation, hotels and self-contained houses. Boutique accommodation and hotels are in low supply in the region as identified in the full accommodation audit, demonstrating a significant gap in preferred accommodation supply.



OF VISITORS WOULD HAVE PREFERRED TO STAY IN BOUTIQUE ACCOMMODATION OR A HOTEL

VISION

THE DAYLESFORD
MACEDON RANGES
REGION IS RECOGNISED
AS VICTORIA'S LEADING
REJUVENATION
DESTINATION.

This vision evolves and refreshes the wellness theme that the region has held for many years. Rejuvenation is **the act** of making something newly fresh or full of energy.

- Drive regional dispersal by using an itinerary based approach to raise awareness of the region's product and experiences and link townships and products.
- Facilitate partnerships and support emerging industry leaders.
- Embrace the competitive advantage of seasonality to generate dispersal, return visitation and to capture new audiences.

Promote sustainable

with consideration

and social equity.

of economic viability, environmental protection

approaches to tourism

- Encourage a continuous improvement approach to product and experiences development, prioritising high quality and high-yield rejuvenation offering.
- Recognise that
 rejuvenation is an
 individual experience
 and that visitors will seek
 out products aligned to
 their interests (e.g. food
 and beverage, wellness,
 nature, arts).

OBJECTIVES -

These are the focus areas that will enable the Daylesford Macedon Ranges region to achieve the vision and objectives.

Invest in Nature and Rejuvenation Product

SIX STRATEGIC PILLARS

Invest in competitive, demand driving rejuvenation products and nature experiences that will elevate the region's reputation and desirability.

11 Projects



Unearth the existing arts and creative offering to enhance the visitor experience within the region.

9 Projects



Deliver high-quality, contemporary and authentic regional food and drink experiences, and use this product to ignite an engaging nighttime economy.

8 Projects



Mobilise industry by encouraging collaboration, whilst advocating the value of tourism, importance of infrastructure and need for connectivity to support the region.

Develop Heritage and Culture Experiences

Showcase and celebrate local heritage and culture to provide a rich visitor experience.

8 Projects



Reinforce and improve the Daylesford Macedon Ranges region brand through strategic marketing and positioning.

11 Projects 8 Projects



Level of investment in the visitor economy



Total visitation



Number of jobs





Length of stay



Visitor spend



Visitor satisfaction

Daylesford Macedon Tourism DMP Summary

PRIORITY PROJECTS FOR DAYLESFORD MACEDON RANGES REGION

A range of regional priority projects have been identified under each strategic pillar. These are of a varying scale, provide new assets to the region and will have a significant impact on increasing visitation.

The role of DMT is to deliver and advocate for projects that will provide significant benefits to the Daylesford Macedon Ranges region visitor economy.

The identified priority projects are detailed in the DMP to enable all stakeholders to collaboratively implement. The projects are to be used as a guide and will be informed by local resourcing and priorities.

PROJECT LEAD

A project lead has been identified for each of the regional priority projects. Key stakeholders that will support the project leads are identified in the full DMP report.

PRIORITIES

The State Government has identified priorities for developing DMPs to ensure these plans reflect a shared vision and strategy for growth of the region's visitor economy.

Each project must align with at least one of the following priorities:

- Supply
- Demand

The priorities for the region are in alignment with the Destination Victoria Brand Playbook (Visit Victoria Brand Framework) which positions the region as a leader in rejuvenation and provides a brand promise to 'Enrich every moment in a rejuvenating hill hideaway'.

TIMEFRAME

The timeframe for each of the regional priority projects have been identified by determining their level of importance, logical staging, as well as which actions can be achieved relatively quickly.

The following timeframes have been used:

- Short-term within 1 year
- Medium-term 1-3 years
- Long-term 4-5+ years
- Ongoing



PILLAR 1 Invest in Nature and Rejuvenation Product

Invest in competitive, demand driving rejuvenation products and nature experiences that will elevate the region's reputation and desirability. This includes nature, cycling and wellness.



Regional Priority Projects		Project Lead	Priority	Timeframe
OF THE DAY	FOR THE DEVELOPMENT LESFORD TO HANGING LNESS RAIL TRAIL	LGAs	Supply Demand	Medium
SUPPORT AND ROCK MAST	CTIONS WITHIN HANGING ERPLAN	DEECA	Supply	Medium - long
	IASTERPLAN FOR MINERAL SERVE, HEPBURN SPRINGS	Hepburn Shire Council	Supply	Medium - long
——————————————————————————————————————	IANAGEMENT PLAN FOR SPRINGS RESERVE, KYNETON	Macedon Ranges Shire Council	Supply	Medium - long
ATTRACT EX	(PERIENTIAL ACCOMMODATION	RTB/VEP & LGAs	Demand	Long to ongoing
DEVELOPMI END WELLN	VESTMENT FOR THE ENT OF A SOPHISTICATED HIGH- IESS RETREAT OR A MINERAL ELLNESS RESORT	RTB/VEP	Supply	Medium
165 41	E ECO CERTIFICATION/ TION FOR THE REGION	LGAs	Supply	Medium - long



Regional Priority Projects		Project Lead	Priority	Timeframe
Ø.,5	DEVELOP A MINERAL WATER EXPERIENCE TRAIL	RTB/VEP	Supply Demand	Short
	ESTABLISH FOREST BATHING (DRY) PRODUCT	RTB/VEP	Supply	Medium
	INVEST IN NATURE-BASED PRODUCT DEVELOPMENT	LGAs	Supply	Medium
1000	LEVERAGE THE CRESWICK MTB TRAIL NETWORK	Hepburn Shire Council	Supply	Ongoing



PILLAR 2 Elevate Food and Drink

Deliver high-quality, contemporary and authentic regional food and drink experiences, and use this product to ignite an engaging night-time economy.



PILLAR 3 Develop Heritage and Culture Experiences

Showcase and celebrate local heritage and culture to provide a rich visitor experience.



PILLAR 4 Celebrate the Arts

Unearth the existing arts and creative offering to enhance the visitor experience within the region.



Regional Prior	rity Projects	Project Lead	Priority	Timeframe
	CREATE A NEW MAJOR REGIONAL ARTS EVENT	RTB/VEP & industry	Supply Demand	Medium - long
0-0-0 ::☆:	DEVELOP A REGIONAL EVENTS PLAN	RTB/VEP	Demand	Short - medium
) } }	EXPLORE THE ESTABLISHMENT OF CONTEMPORARY ART TRAILS	LGAs	Demand	Medium
	ELEVATE EXISTING ARTS AND FRINGE EVENTS ACROSS THE REGION	RTB/VEP	Supply Demand	Medium
	UNLOCK UNDISCOVERED ARTS EXPERIENCES	RTB/VEP	Demand	Medium
*;	BUILD ON EXISTING PUBLIC ART PROGRAMS	RTB/VEP	Supply	Long



Regional Prior	rity Projects	Project Lead	Priority	Timeframe
	ADVOCATE FOR FUNDING FOR CLUNES ART ACTIVATION FOCUSED ON LITERATURE AND ARTISTS	RTB/VEP & industry	Supply Demand	Medium - long
	INTEGRATE COMMUNITY ARTS INITIATIVES WITH THE VISITOR ECONOMY	LGAs	Demand	Short - medium
	IMPROVE THE VISITOR EXPERIENCE AT EXISTING GALLERIES AND MUSEUMS	LGAs	Supply	Long



PILLAR 5 Strengthen Industry and Enhance Infrastructure and Connectivity

Mobilise industry by encouraging collaboration, whilst advocating the value of tourism, importance of infrastructure and need for connectivity to support the region



Regional Priority Projects		Project Lead	Priority	Timeframe
- <u>-</u> -	DEVELOP AND LAUNCH A REGIONAL PUBLIC AND PRIVATE INVESTMENT PROSPECTUS	RTB/VEP	Supply	Long
	PROVIDE INDUSTRY SUPPORT AND DEVELOPMENT	RTB/VEP	Supply	Short to ongoing
Ž.	ENSURE ACCESSIBILITY FOR ALL VISITORS TO THE REGION	RTB/VEP	Supply Demand	Medium - long
	ADVOCATE FOR INTERNET AND MOBILE PHONE SERVICES ACROSS THE REGION	RTB/VEP & LGAs	Demand	Medium - long
	CONDUCT A VISITOR SERVICES REVIEW	RTB/VEP	Demand	Short - medium
	SUPPORT AND PARTICIPATE IN WORKFORCE INITIATIVES AND PROGRAMS	LGAs	Supply	Short - medium
	ADVOCATE TO IMPROVE TRANSPORT OPTIONS	RTB/VEP & LGAs	Supply Demand	Medium - long



Regional Priority Projects		Project Lead	Priority	Timeframe
	IDENTIFY NEW CARAVAN AND CAMPING LOCATIONS IN REGION	RTB/VEP	Demand	Short to ongoing
	PREPARE FOR EMERGING VISITOR MARKETS	RTB/VEP & LGAs	Demand	Medium - long
	CREATE A TOWNSHIP STREETSCAPES AND GATEWAY PROGRAM	LGAs	Demand	Medium - long
T S V	ESTABLISH A BUSINESS REFERRAL SYSTEM	RTB/VEP	Demand	Medium



PILLAR 6 Targeted Marketing and Positioning

Reinforce and improve the Daylesford Macedon Ranges Region brand through strategic marketing and positioning.



Regional Priority Projects		Project Lead	Priority	Timeframe
@ (\$\frac{1}{2}\text{\$\text{\$\omega\$}}	DEVELOP ITINERARY BASED EXPERIENCES THAT SUPPORT DISPERSAL	RTB/VEP	Demand	Short to ongoing
- 0	PROMOTE CYCLING EXPERIENCES THAT			
	INCLUDE GRAVEL CYCLING AND MOUNTAIN BIKING	RTB/VEP & LGAs	Demand	Short to ongoing
	DEVELOR DARTHERSHIPS AND DOSITION			
	DEVELOP PARTNERSHIPS AND POSITION WELLBEING OFFERINGS FOR HIDDEN DISABILITIES	RTB/VEP	Demand	Short to ongoing
	CREATE A FOCUSED CAMPAIGN ON REJUVENATION AND NATURE BASED EXPERIENCES	RTB/VEP	Demand	Ongoing
J. Jam	TAKE A PROACTIVE MARKETING APPROACH TO MEET THE VISITOR WHERE THEY ARE	RTB/VEP	Demand	Short to ongoing
***************************************	ENCOURAGE THE REGION TO OWN THE SEASONS	RTB/VEP	Demand	Ongoing
<u></u>	STRENGTHEN DAYLESFORD'S STATUS AS THE LGBTIQA+ CAPITAL OF AUSTRALIA	RTB/VEP & Hepburn Shire Council	Demand	Short to ongoing
	ENHANCE THE ROMSEY TO LANCEFIELD FEDERATION TRAIL	Macedon Ranges Shire Council	Supply	Short - medium

Acknowledgments

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- Daylesford Macedon Tourism
- Hepburn Shire Council

DAYLESFORD MACEDON TOURISM

• Macedon Ranges Shire Council

Hepburn
SHIRE COUNCIL

Macedo Ranges
Shire Council

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Daylesford Macedon Tourism DMP Summary