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MURRINDINDI SHIRE TOURISM AND EVENTS STRATEGY

STRATEGY 2019 - 2025

MURRINDINDI SHIRE COUNCIL | NOVEMBER 2019



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FILE

Murrindindi Shire Tourism and Events Strategy V2

VERSION

2

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ACRONYMS

GRVT	Goulburn River Valley Tourism
LBTA	Local Business and Traders Association
LTA	Local Tourism Association
NBT	Nature-based tourism
RTB	Regional Tourism Board
TRA	Tourism Research Australia
VFR	Visiting Friends and Relatives
VIC	Visitor information Centre

EXECUTIVE SUMMARY

PROJECT OVERVIEW

Urban Enterprise was commissioned by Murrindindi Shire Council to undertake the Murrindindi Shire Tourism and Events Strategy, which aims to redefine how tourism and events are experienced within the Shire. The Strategy is required to guide the delivery of all tourism and events activities in the area, providing the opportunity for a long-term plan and vision for Murrindindi Shire which will strengthen the role of tourism in the region's economy.

The draft report has been updated to reflect the current tourism context of Murrindindi Shire, which is currently not associated with any Regional Tourism Body since the recent dissolution of Goulburn River Valley Tourism.

STRATEGIC CONTEXT

Destination development for Murrindindi Shire Council is supported by an extensive list of Federal, State, Regional and Local Government policy and strategy documents.

Key themes from the existing strategic policy framework include:

- Federal and state government focus on the emerging Asian visitor market;
- Federal, state and local government support to promote the value of Australia as an eco-tourism destination;
- Encouraging tourism developments adjacent to national parks; and
- Strengthening awareness of and further develop cycling tourism experiences.

Murrindindi Shire is excellently placed to meet strategic goals for the Victorian tourism industry, particularly with the enhancement of its nature-based tourism offer.

MURRINDINDI VISITOR PROFILE AND ECONOMY – TO BE UPDATED

Visitation to Murrindindi Shire was 1,033,000 visitors in 2018, comprised of predominately day trip visitors (72%), followed by overnight trip visitors (27%). The visitor economy contributes \$94.1 million and 493 jobs to the Murrindindi economy.

Visitors	Tourism Output	Tourism Jobs
1,033,000	\$94.1M	493

Visitation to Alexandra, Marysville and Eildon accounts for 62% of visitation to the Shire. This is likely due to more developed and widely recognised natural assets, tourism products and destinations in these sub-regions such as Lake Eildon, Marysville and Lake Mountain.

88% of domestic visitors originate from Victoria, with 55% of these visitors from Melbourne's East and North regions. Therefore, there is strong opportunity to target Melbourne's North and East regions.

The domestic target markets for Murrindindi Shire will be focused towards older couples, younger families, nature-based visitors and the Lifestyle Leader market. Although international visitation is quite low in Murrindindi (2%), the Asian visitor market is a key emerging market for Murrindindi.

Murrindindi Shire has very similar visitation patterns to the neighbouring Mansfield Shire, particularly in terms of purpose of visit for both day trip and overnight visitors, and in terms of visitor origin for overnight visitors.

PRODUCT PROFILE

Murrindindi Shire is a nature-based destination north east of Melbourne, with natural assets that provide opportunity for cycling, bushwalking, fishing, snow activities, hunting and other water-based recreation. It has emerging food and agribusiness and arts and heritage product to complement its nature-based strengths. Some of the key destinations that are key drivers of visitation to Murrindindi that can be further enhanced and marketed include:

- Lake Eildon and Lake Eildon National Park;
- Yarra Ranges National Park;
- Kinglake National Park;
- Cathedral Range State Park;
- Murrindindi Scenic Reserve;
- Rubicon Historic Area;
- Lake Mountain;
- Marysville; and
- Goulburn River and its tributaries.

Whilst Murrindindi Shire has high quality natural assets, there is a need for investment by the private sector in businesses that deliver new and improved food, beverage and accommodation product to the region. These products are critical to increasing yield and attracting high spend visitors to Murrindindi.

EVENT PROFILE

There were 27 tourism events in 2018, attracting approximately 39,000 visitors. Although not tourism events, it is important to note that there are several other small-scale community events in the region, totalling 43 events and receiving about 5,500 visitors annually.

The Alexandra Truck Ute & Rod Show is Murrindindi's signature event. It is a 2-day event held in June, which currently attracts over 12,000 visitors annually. It is generally agreed upon by local tourism businesses that accommodation demand outweighs supply in the Shire during busy event periods. Other important tourism

events are Eildon Lions Market, Alexandra & District Open Gardens, Foggy Mountain Music Bluegrass Festival and Marysville Jazz and Blues Festival.

Flowerdale Estate, Holmesglen Eildon and Vibe Marysville are key event facilities that can be further promoted to increase visitation to the shire. There are several existing community buildings that have significant potential to be expanded to hold large-scale events, such as Kinglake Ranges Rebuilding Advisory Centre (RAC) and Marysville Stadium.

There are significant gaps in food and wine and adventure and outdoor sports events in Murrindindi. There are a number of events that can be expanded to increase overnight visitation and yield, as well as events with synergies that can be expanded further, including Marysville Jazz and Blues Weekend and Foggy Mountain Music Bluegrass Festival.

There is also opportunity to attract new events to the region that align to Murrindindi's product strengths. In order to support existing and future events, local tourism and hospitality businesses need to trade outside normal hours during a significant event/function/conference to provide a more attractive, contemporary visitor experience.

GOVERNANCE, TOURISM RESOURCES AND VISITOR SERVICING

Murrindindi Shire has a fragmented approach to tourism governance when compared to most other Local Governments in regional Victoria. The fragmentation is present due to the existence of many local tourism and business associations across the key destinations within Murrindindi, as well as overlap in regional tourism structures. This fragmented approach means duplication of effort across a range of tourism administration, marketing, visitor services and digital content exists. This duplication of effort has resulted in mixed branding and messaging, inconsistent approach to digital media and visitor services, and poor use of limited resources available.

It is critical that tourism governance is simplified and streamlined to improve the quality and consistency of approach and to better leverage from regional tourism resources.

Murrindindi Shire was one of four Local Government members of Goulburn River Valley Tourism, however due to the dissolution of Goulburn River Valley Tourism, Murrindindi Shire is not aligned to any Regional Tourism Board.

Yarra Ranges Tourism and Tourism North East promote aspects of Murrindindi Shire as part of their Regional Tourism Boards. In the case of Yarra Ranges Tourism, Marysville and Kinglake Ranges are aligned to the Yarra Valley for marketing purposes and Tourism North East promotes the Great Victorian Rail Trail and Lake Eildon under the High Country umbrella.

The following key considerations should be made when identifying a regional tourism organisation to align with:

- Value – What value can Murrindindi Shire leverage from the membership dollars: This includes consideration of available marketing opportunities, digital leadership and professionalism;
- Physical alignment – how well is the regional physically aligned? – are visitors likely to visit Murrindindi as well as other parts of the associated region – is there potential for visitor dispersal;
- Product alignment – How well is Murrindindi aligned in terms of product – does collaborative marketing make sense?
- Financial – Can Murrindindi afford the costs associated with membership.

There are two options available at present in relation to regional alignment (Tourism North East and Yarra Ranges Tourism), the recommended approach for Murrindindi Shire in the short is to focus on its internal marketing and product development until the State Government Regional Tourism Review is complete and then decide the best fit Regional Tourism Board to align with.

Working with more than one Regional Tourism Board is likely to perpetuate the existing fragmentation of Murrindindi Shire's tourism and promotional efforts, therefore it is recommended that Murrindindi Shire chooses to align with only one tourism board following the finalisation of the Regional Review.

MARKETING AND VISITOR SERVICES

Murrindindi Shire has a well-developed network of Visitor Information Centres, with four VICs including two accredited VICs in Yea and Marysville.

Marysville and Yea VICs are performing relatively well with around 30,000 visitors to the Yea VIC annually and 40,000 visitors to the Marysville VIC annually. Whilst there has been some decline of visitors to the Marysville VIC in recent years, this aligns with a general reduction of visitors using physical VICs across Victoria with digital information now a preference for most visitors.

The Eildon and Alexandra VICs have significantly lower visitation than Yea and Marysville. This is attributed to lower levels of visitation to each of these individual destinations by visitors and lack of collocated product to strengthen the appeal of the VICs. In the case of the Yea VIC, it is collocated with Y Water Discovery Centre which attracts visitors to the precinct, as does the Maryville VIC which is collated with an art gallery space.

With such low visitation to Eildon VIC, it is unsustainable to maintain a standalone VIC presence in the town. Eildon is also highly seasonal and has very low mid-week visitation. Collocation of visitor services with a retailer in town would provide an adequate approach for visitor services in Eildon.

In the case of Alexandra, collocation with a nature-based hub which includes bike hire, canoe hire and outdoor activity tour operators would strengthen the number of visitors to the VIC and provide a much-needed destination for nature-based visitors.

The marketing and digital presence aligned to each of the sub regional LTAs needs further investment. Given that Murrindindi's destinations have strong alignment with High Country, Yarra Ranges and Goulburn River Valley, there is a need to work with these organisations to strengthen each destinations presence in the marketplace. There is a need for further investment in marketing aligned to sub regional destination brands by Murrindindi Shire in order to grow brand recognition and drive visitation.

VISION

Murrindindi will transform into one of Victoria's leading nature-based tourism destinations which is accessible to family markets, adult couples, nature-based tourism enthusiasts and emerging international markets. Murrindindi will strengthen its complementary tourism product including food and agribusiness and new and improved accommodation to meet contemporary market expectations and needs.

KEY STRATEGIC CONSIDERATIONS AND OBJECTIVES

- **Murrindindi Shire needs clear strategic direction.** Murrindindi Shire needs a clear strategy with regard to marketing, brand and industry development needs, which will allow the Shire to influence what it needs from partners such as regional tourism organisations/boards;
- **Limited overnight visitor growth.** Murrindindi Shire needs investment in accommodation product and Murrindindi's destinations need to develop a strong brand presence in the marketplace in order to convert day trip visitors to overnight visitors.
- **Unclear and inconsistent approach to brand, marketing and digital media.** Murrindindi Shire needs to invest further in marketing to grow awareness of its high quality destinations. Furthermore investment in marketing action plans for each sub regional destination and product strengths will provide clear guidance and strategy for these key destination assets.
- **Lead with areas of competitive strengths.** Murrindindi Shire needs focus marketing efforts on its icons, (e.g. Lake Eildon, Lake Mountain, Great Victorian Rail Trail and Marysville), its well-known village destinations (e.g. Yea, Alexandra and Kinglake), as well as marketing its niche competitive strengths to nature-based markets (e.g. cycling, bushwalking, snow, fishing and hunting). Leveraging from Yarra Ranges Tourism and Tourism North East's marketing efforts will be the most effective way to promote Murrindindi's key destinations
- **Fragmented governance.** Greater leadership by Murrindindi Shire is needed to drive professionalism in Murrindindi Shire and provide greater consistency in approach to visitor services, marketing and digital media.

STRATEGIC DIRECTIONS

DIRECTION A Deliver a streamlined approach to tourism industry governance.

DIRECTION B Deliver streamlined and effective marketing and visitor information services.

DIRECTION C Development of product strengths and investment in emerging opportunities and supporting infrastructure.

DIRECTION D Drive tourism growth to Murrindindi through an enhanced events calendar.

1. INTRODUCTION

1.1. BACKGROUND

Urban Enterprise was commissioned by Murrindindi Shire Council to undertake the Murrindindi Shire Tourism and Events Strategy, which aims to redefine how tourism and events are experienced within the Shire.

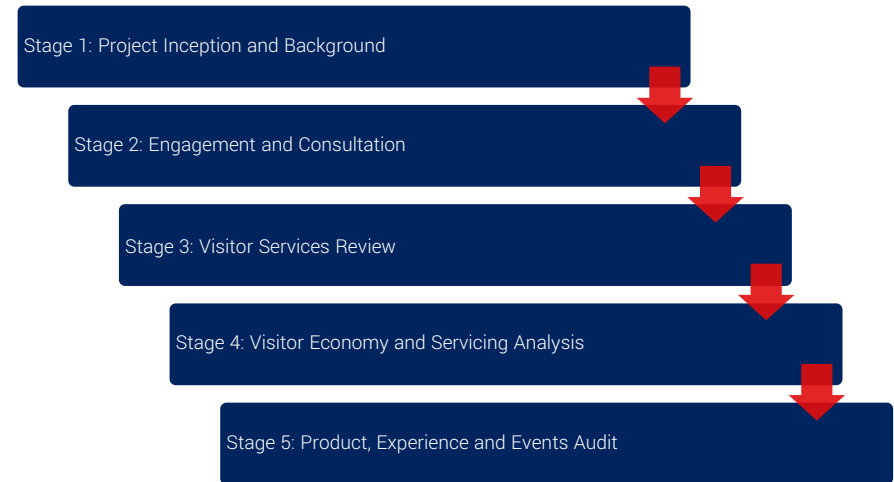
1.2. PROJECT DRIVERS

The Murrindindi Shire Tourism and Events Strategy is required to guide the delivery of all tourism and events activities in the area, providing the opportunity for a long-term plan and vision for Murrindindi Shire which will strengthen the role of tourism in the region's economy.

In particular, the Strategy aims to address the following objectives:

- Strengthen awareness of Murrindindi's destinations in the market place through the continued development of contemporary tourism product and infrastructure such as quality accommodation, food and wine, recreation activities and events;
- Address seasonality issues to the Shire's key tourism assets such as Lake Eildon, Marysville/Lake Mountain, High Country National and State Parks and the Goulburn River system;
- Review all local business and tourism associations (LBTAs); Visitor information Centres (VICs) and marketing approaches within the Shire; and
- Review the Shire's current and potential Regional Tourism Board alignment.

1.3. APPROACH



STAKEHOLDER ENGAGEMENT AND CONSULTATION

Urban Enterprise undertook a round of consultation with key stakeholders to discuss issues and opportunities related to the project. These workshops were focused to key destinations in Murrindindi to allow focus on the diverse regional strengths within Murrindindi, including Yea, Alexandra and Marysville.

The consultation process consisted of workshops with the following consultation groups:

- Council officers and other regional stakeholders (e.g. Parks Victoria representatives);
- Councillors;
- Innovators / Business Owners Workshop (x2 sessions);

- Community members; and
- Local Business and Traders Association/VIC's.

DRAFT REPORT AND INDUSTRY FEEDBACK

Urban Enterprise prepared a draft report in February 2019, which received comments from council staff, Local Tourism Associations (LTAs), industry members and Regional Tourism Boards (RTBs).

Key areas for comment were regarding review of RTB alignment, and whether to continue affiliation with Goulburn River Valley Tourism (who were the RTB governing Murrindindi Shire at the time) or whether to refocus alignment to Yarra Ranges Tourism or Tourism North East.

Since the release of the initial draft report, Goulburn River Valley Tourism announced their dissolution on April 12, 2019. This has impacted much of the discussion and the recommendations presented in the initial release of the draft report.

The draft report has been updated to reflect the current context of Murrindindi Shire, which is currently not associated with any Regional Tourism Body.

1.4. REPORT STRUCTURE

This report has been prepared in the following sections:

- Strategic Context;
- Visitor Economy Profile;
- Product Profile;
- Events Profile;
- Governance;
- Marketing and Visitor Information Services;
- Strategic Directions; and
- Implementation Strategy.

1.5. CONTEXT

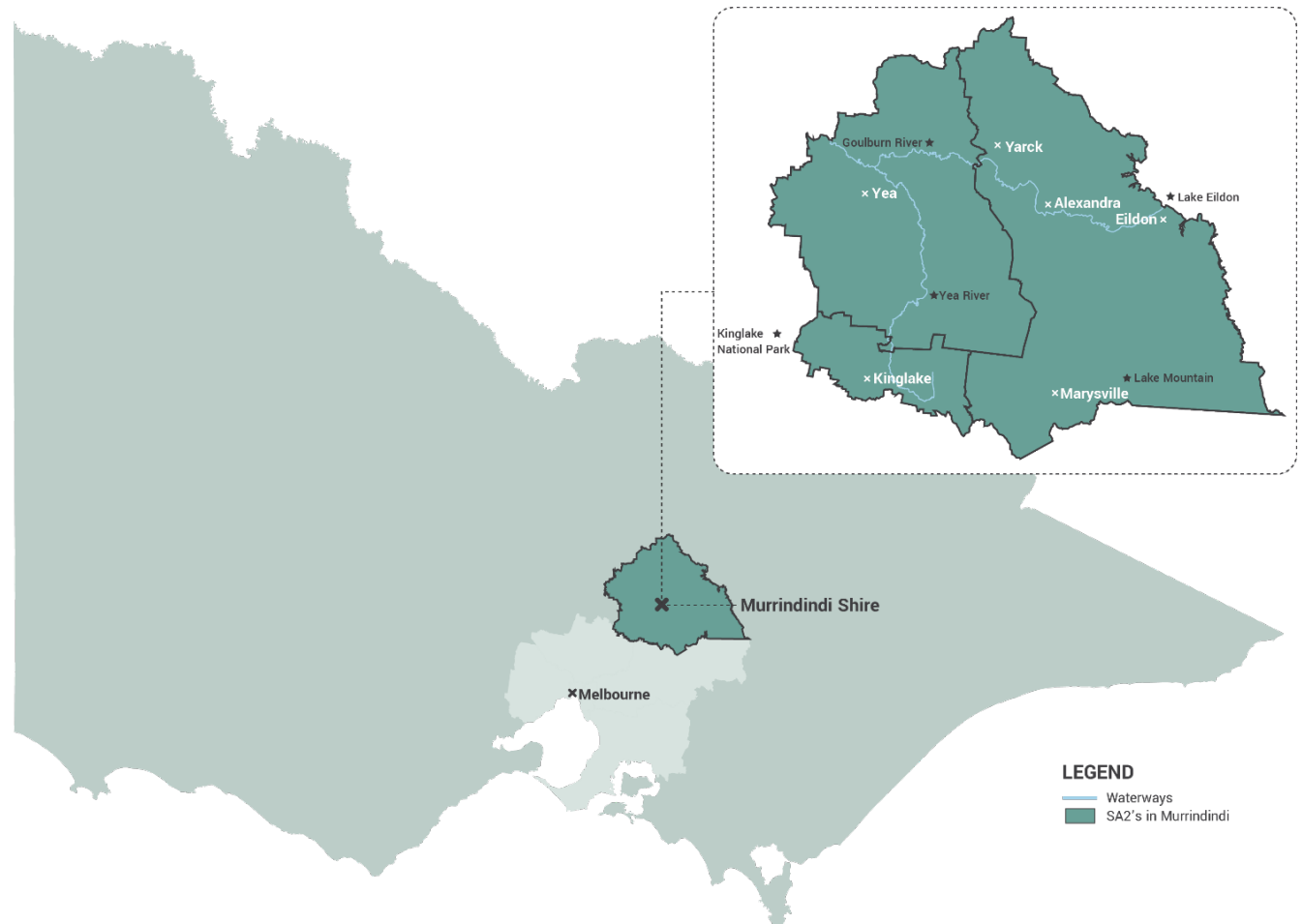
1.5.1. REGIONAL CONTEXT

Murrindindi Shire is located just north-east of Metropolitan Melbourne, with a distance of less than 100 kms to Melbourne CBD. Murrindindi Shire has a population of close to 14,000. Key industries of employment within the Shire are primary production, forestry, tourism, light manufacturing and engineering.

Despite proximity to Melbourne, population growth has been relatively slow in Murrindindi, with only 7% total growth between the years 2001-2017. Murrindindi has experienced much slower growth than neighbouring high growth municipalities Mitchell and Mansfield. This is partly due to impacts of the Black Saturday Bushfires, but also due to its geography making it difficult to access from Melbourne, compared to Mitchell Shire.

Murrindindi Shire consists of three Statistical Area 2 regions: Yea, Kinglake and Alexandra. For the purposes of this report, they have been identified as Yea & Surrounds, Kinglake Ranges, and Alexandra, Marysville & Eildon. Where possible, data has been provided for these areas.

F1. VICTORIAN CONTEXT



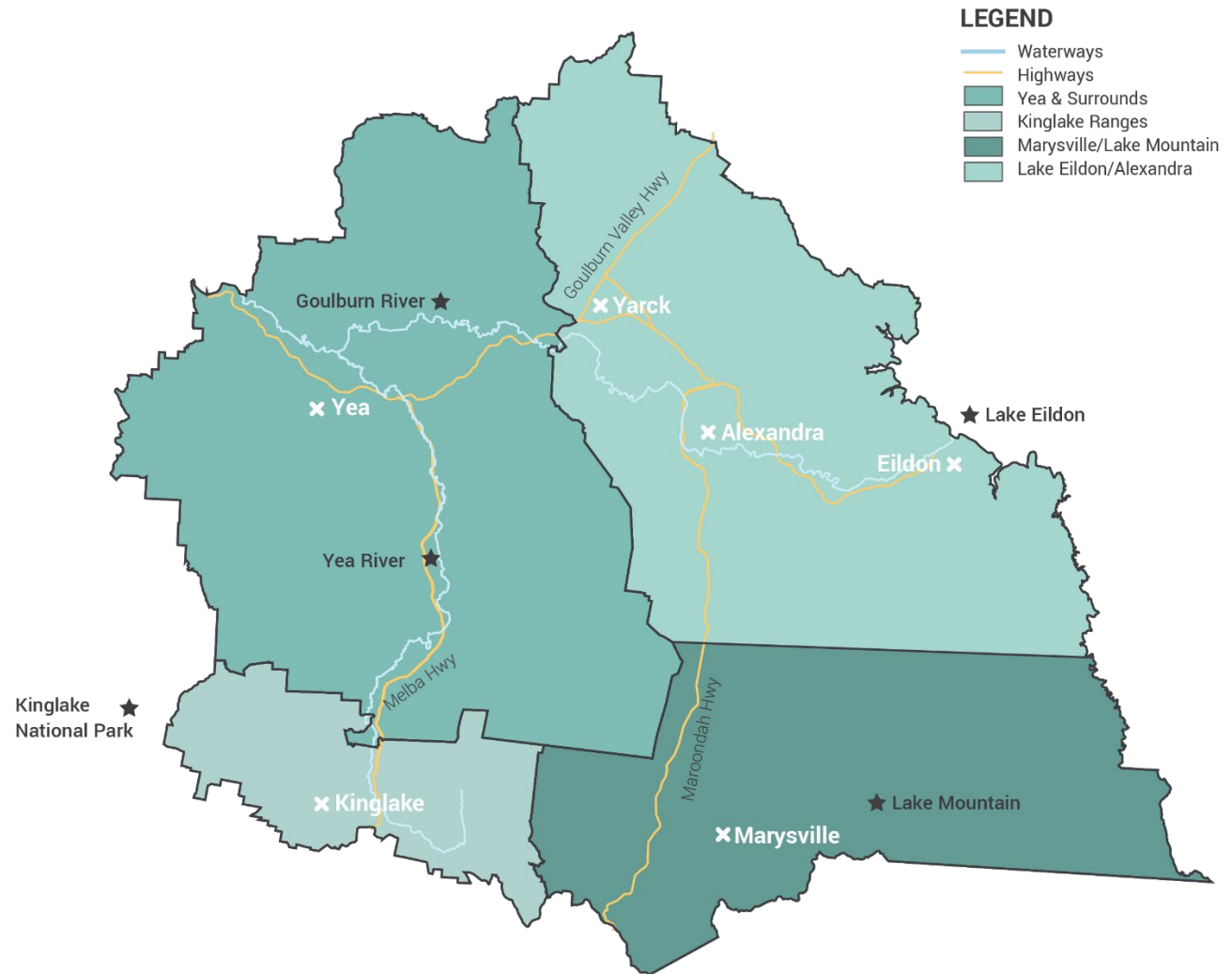
Source: Urban Enterprise, 2018

1.5.2. SUB-REGIONAL DESTINATIONS

In terms of tourism and event product, it is useful to assess Murrindindi's tourism offering through each of its destinations, due to the distinct and unique offerings and geography of each. Murrindindi is not recognised as a single brand for visitors from Melbourne and regional Victoria, however its destinations including Marysville/Lake Mountain and Lake Eildon are easily recognised.

Lake Eildon/Alexandra and Marysville/Lake Mountain have been identified as primary visitor destinations for Murrindindi. Secondary Destinations have been identified as Kinglake Ranges and Yea & Surrounds.

F2. DESTINATION REGIONS WITHIN MURRINDINDI SHIRE



Source: Urban Enterprise, 2018.

2. STRATEGIC CONTEXT

2.1. INTRODUCTION

This section provides an overview of the strategic and policy context for Murrindindi Shire, through a detailed review of local tourism and planning strategies, as well as the broader tourism context for the region. This includes key drivers of the project and helps to understand the relationship between the development of the region, tourism and the visitor economy.

Key information discussed in this section was sourced from a review of Government strategies and policies.

2.2. KEY FINDINGS

Destination development for Murrindindi Shire Council is supported by an extensive list of Federal, State, Regional and Local Government policy and strategy documents.

Key themes from the existing strategic policy framework include:

- **Federal and state government focus on the emerging Asian visitor market;**
- **Federal, state and local government support to promote the value of Australia as an eco-tourism destination;**
- **Encouraging tourism developments adjacent to national parks; and**
- **Strengthening awareness of and further develop cycling tourism experiences.**

Murrindindi Shire is excellently placed to meet strategic goals for the Victorian tourism industry, particularly with the enhancement of its nature-based tourism offer.

2.3. TOURISM POLICY & RESEARCH

2.3.1. FEDERAL POLICY AND STRATEGY

TOURISM 2020 STRATEGY

The Tourism 2020 strategy was developed to provide long term goals for the Australian tourism industry. The six key areas of the strategy include:

- Grow demand from Asia;
- Build competitive digital capability;
- Encourage investment and implement the regulatory reform agenda;
- Ensure tourism transport environment supports growth;
- Increase supply of labour, skills and Indigenous participation; and
- Build industry resilience, productivity and quality.

NATURE RESERVES AND CONSERVATION PARKS IN AUSTRALIA INDUSTRY REPORT

The Nature Reserves and Conservation Parks in Australia Industry Report developed by IBISWorld in 2017 identified the following key points in relation to the scope and performance of the nature reserves and conservation parks industry in Australia:

- Rising international and interstate tourism has boosted demand for nature reserves and conservation parks over the past five years. The rising popularity of ecotourism has prompted state governments to renew their investment in national park facilities, and enact marketing campaigns to promote the value of Australia as an ecotourism destination;

- Across Australia, the industry has experienced a 3.0% annual growth in industry revenue between 2013-18 to \$1.7 billion, with 2.2% annual growth predicted to occur between 2018-23;
- There are 3,027 reserves across the state of Victoria, comprising 3.9 million hectares of protected area, and the highest number of reserves across the country;
- 22.5% of enterprises in the industry are located in Victoria;
- Parks Victoria manages 45 national parks, 26 state parks, 13 marine national parks, 11 marine sanctuaries, 30 metropolitan parks, 60 other parks and approximately 70% of Victoria's coastline, as well as a range of other assets; and
- In total this equates to Parks Victoria managing a total of 3.9 million hectares of reserves and parks, representing approximately 17.2% of the total Victorian land area.

2.3.2. STATE POLICY AND STRATEGY

VICTORIAN VISITOR ECONOMY STRATEGY, JULY 2016

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

The **Visitor Economy Strategy** provides state wide direction for the growth of the tourism industry, outlining nine priority goals:

- More private sector investment;
- Build on the potential of regional and rural Victoria;
- Improve branding and marketing;
- Maximise the benefits of events;

- Improve experiences for visitors from Asia;
- Better tourism infrastructure;
- Improve access into and around Victoria;
- Skilled and capable sector; and
- More effective coordination.

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

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

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

VICTORIAN REGIONAL ECONOMIC DEVELOPMENT AND SERVICES REVIEW 2015

The Victorian Regional Economic Development and Services Review was developed in 2015 by the Victoria State Government and identifies actions to better position regional Victoria for future growth and prosperity.

The review identified the following eight key shifts that will create challenges and/or opportunities for regional Victoria:

- Economic growth in Asia;
- Advances in technology;
- Increasing transport connectivity;
- Accommodation of future growth;

- Ageing population;
- Changing skill and workforce requirements;
- Addressing socio-economic disadvantage; and
- Climate change.

The review provides 60 recommendations to guide development in regional Victoria, identified recommendations of particular relevance to the future tourism growth of Murrindindi include:

- High priority - improving the productivity of the road network;
- Improving regional commuter rail passenger services;
- High priority – improving telecommunications access in regional areas;
- High priority – attracting investment into the visitor economy (in particular Action b. Encouraging tourism developments adjacent to national parks);
- Improving the experience for visitors; and
- Developing creative and cultural industries.

VICTORIA'S CYCLING TOURISM ACTION PLAN 2011- 2015

Victoria's Cycling Tourism Action Plan (**Action Plan**) was developed in 2011 by Tourism Victoria to:

- Outline Victoria's current position in relation to cycle tourism;
- Provide an overview of current visitation and segmentation; and
- Propose a number of directions and actions to increase awareness and visitation to Victoria by consumers seeking a cycle tourism experience.

The **Action Plan** outlines three key objectives or directions in relation to cycling tourism:

- Strengthening the supply of cycling tourism experiences;
- Building consumer demand for cycling tourism experiences; and
- Attracting and leveraging events.

VICTORIA'S TRAILS STRATEGY 2014-24

Published by the Victoria Government in July 2014, Victoria's Trails Strategy (**Trails Strategy**) outlined five key strategic directions:

- Provide a strategic framework for trail investment
- Support effective planning, development and maintenance of trails
- Provide high quality information on trails
- Create better trail experiences; and
- Market trails.

Identifying that there are 2,000 plus trails across the state which attract a wide range of people and provide health, educational, cultural and environmental benefits, the **Trails Strategy** identified that the Victorian Government manages 85% of these trails, many of which are in protected areas, such as National Parks, State Parks, State forests and reserves

The **Trails Strategy** outlines a Vision "*for Victoria to be recognised as a leading trail-based destination that provides a diverse range of quality trail experiences for visitors, while strengthening the State's economy and improving the health, wellbeing and lifestyle of the community*"

Importantly, the **Trails Strategy** also outlines that "*From a local community perspective, trails are important infrastructure that support recreational and fitness activities, such as walking, cycling and running. They may also be a source of community pride and important local landmarks of cultural and heritage significance*".

A key focus of the strategy is to increase awareness of the numerous trails in Victoria, and key to the development of Murrindindi, to promote the Great Victorian Rail Trail further.

2.3.3. REGIONAL POLICY AND STRATEGY

GOULBURN RIVER VALLEY DESTINATION MANAGEMENT PLAN, 2014

The Goulburn River Valley Destination Management Plan (DMP), 2014, prepared by Urban Enterprise, on behalf of Goulburn River Valley Tourism, is the major strategic plan for tourism in the Goulburn River Valley. The DMP outlines a framework to guide the development of tourism in the region. The framework is based upon 10 strategic development themes, which are:

1. Delivering strategic development opportunities and catalyst projects;
2. Accessing and utilising the region's water and nature-based assets;
3. Supporting and delivering new events;
4. Capitalising on the equine sector;
5. Destination position;
6. Defining new touring routes and linkages;
7. Improving the accommodation offer;
8. Place making; and
9. Improving the accessibility and transport infrastructure.

The DMP, to lead to investment and raise the profile of the Goulburn River Valley, also outlines 12 catalyst projects which include the expansion of the Great Victorian Rail trail, Lake Eildon waterfront opportunities, Toolangi canopy tour and Marysville spa and wellness projects.

GOULBURN RIVER VALLEY DESTINATION MANAGEMENT PLAN UPDATE, 2017

The Goulburn River Valley DMP Update, 2017 was undertaken by Urban Enterprise on behalf of Goulburn River Valley Tourism to identify how the region's tourism, including products and priorities have changed since the preparation of the 2014 DMP.

The updated DMP contains 20 priority projects, of which the following are related to Murrindindi:

1. Kinglake/Toolangi Canopy Tour;
2. Wellness Resort;
3. Great Victorian Rail Trail Expansion and Product Development;
4. Lake Eildon Waterfront Development Opportunities;
5. Eildon Pondage Development Opportunities;
6. Marysville Spa and Wellness; and
7. Marysville Cycling Destination Development.

The DMP update also identifies destination development opportunities; these are Tier 2 and 3 opportunities that are secondary to the previously outlined priority projects. For each key destination cluster, the plan includes:

- A description of each product development opportunity, providing a summary of the key elements of initiative;
- The project location; and
- The alignment of projects with the identified strategic themes and the strategic rationale for recommending the project.

2.3.4. LOCAL POLICY AND STRATEGY

MURRINDINDI SHIRE COUNCIL PLAN, 2017 – 2021

The Murrindindi Shire Council Plan 2017 to 2021 outlines priorities for Council over the four years between 2017 and 2021 and identifies activities which will be undertaken. In relation to tourism, it is identified in the plan that growing tourism, visitation and events is a key aspect of improving the prosperity of the municipality. To achieve this, Council aims to work with local business and regional partners to *“support a diverse visitor experience that promotes natural assets, and a vibrant range of events”* (page 21).

MURRINDINDI SHIRE COUNCIL PLAN 2017 – 2021 DRAFT PRIORITY ACTION PLAN 2018 – 2019

The Priority Action Plan 2018/19 outlines the actions which will be undertaken by Council to implement the Council Plan 2017-2019 over the 2018/19 financial year. Key actions relating to tourism include:

10. **“Strategy 3.1:** Use a fresh approach to attract new and existing business investment:
 - a. **Action 3.1.1** Provide a seamless service for businesses and investor:
 - i. **Key Focus Areas**
 - Continue to deliver the Business and Tourism Innovation Grants Program.
11. **Strategy 3.2:** Work with our business, regional partners and communities to support a diverse visitor experience that promotes our natural assets, and a vibrant range of events:
 - a. **Action 3.2.1** Partner with regional and local stakeholders to enhance the economic benefit of the tourism sector
 - i. **Key focus areas:**
 - Review Council’s role in the function and effectiveness of local businesses and tourism associations and Murrindindi Inc.
 - Work with existing tourism partners and resource future partnership arrangements to develop the tourism sector”
 - b. **Action 3.2.2** Leverage natural assets to build on the tourism offer:
 - i. **Key focus areas:**
 - Showcase key natural assets to visitors and residents. Advocate for improved infrastructure, access, funding and development to enhance the visitor experience of natural assets.
 - c. **Action 3.2.3** Support tourism, experiences, event development and delivery:
 - i. **Key focus areas:**

- Develop a Tourism and Events Plan and investigate resources for delivery;
- Advocate to maintain the Jayco Herald Sun Tour in Kinglake;
- Utilise the Business and Tourism Innovation Grants Program to attract new events and support smaller events to start and to grow visitation;

d. Action 3.2.4 Strengthen marketing and promotional activities:

i. Key focus areas

- Deliver the Tourism and Events Strategy and the Communications and Marketing Strategy;
- Continue established marketing channels, including Discover Dindi, Great Victorian Rail Trail, Goulburn River Valley Tourism’s Heart of Victoria campaign”.

12. Strategy 3.3: Support and encourage local businesses to work together, thrive, grow, through networking, start-up assistance, mentoring, and access to skills:

a. Action 3.3.2: Ensure businesses have access to the information and support they need to improve their viability:

i. Key focus areas:

- Provide access to relevant business support services through the Business and Tourism Innovation Grants Program.”

MURRINDINDI SHIRE ECONOMIC DEVELOPMENT STRATEGY FOR AGRICULTURE, FORESTRY AND TOURISM SECTORS, 2003 – 2008

The Murrindindi Shire Economic Development Strategy for Agriculture, Forestry and Tourism sectors 2003 – 2008 recognised Agriculture, Forestry and Tourism as the key industries for the municipality. In relation to tourism, the Strategy identifies 7 priority actions to support the growth of tourism in Murrindindi. These actions are:

1. Improve the tourism industry organisational framework - clarify the roles of the RTA and LTAs and strengthen the tourism industry organization membership base.
2. Affirm Council's ongoing support for the tourism industry for the next 3 years.
3. Strengthen tourism industry networking, cooperation and communication on a number of levels including across tourism industry sectors, Local Tourism Associations, with the outdoor education, timber and agriculture industry sectors, and with other external stakeholders.
4. Develop a touring route supported by appropriate information collateral and signage. The route would encompass the whole of the Shire of Murrindindi linking the three major icons with the Shires key attractions and townships.
5. Development of infrastructure to access the natural attractions. Seek grant funding to undertake a feasibility study for the Rubicon historic area and develop the next planning stages for the Mitchell to Murrindindi Rail Trail.
6. Review tourism signage and develop an integrated tourism signage strategy.
7. Develop a consistent approach to branding and positioning for tourism incorporating the icon attributes and the townships in the Shire.

ECONOMIC DEVELOPMENT STRATEGY 2011-2016

The Murrindindi Economic Development Strategy 2011 to 2016 outlines the actions which will be undertaken by Council to foster economic development within the municipality. The Strategy is based upon 7 strategies, which are outlined below:

1. *Vibrant Businesses: actively support the establishment of new businesses and the sustainable growth of existing businesses as a key to the economic prosperity and vitality of the shire;*
2. *Industry Support: build on the strengths of existing local industry sectors and to identify and support new and emerging industries;*

3. *Natural and Built Environments; protect, manage and promote the natural environment and cultural heritage of the region. To support the development of infrastructure and facilities that will enhance liveability within the shire;*
4. *Growth, Sustainability and Innovation: facilitate and support growth in the commercial and residential rate base that is sustainable and innovative, and which is underpinned by community values;*
5. *Partnerships and Relationships: develop and maintain partnerships, collaboration and shared goals within and between communities, businesses, all levels of government, industry sector associations and non-government organisations;*
6. *People and Potential; attract and retain a broad cross section of people from a range of age groups and to maximise their potential through education, and*
7. *Vibrant Communities: support and encourage local, 'place-based' initiatives that will provide direct economic benefit to individual towns and communities.*

The Strategy also identifies 6 Recommended Areas of Focus, including Tourism.

Key opportunities and recommendations identified to further the development of tourism in the region include the development of a range of products and ensure there is one coordinated voice to market the Murrindindi Shire. Potential products include the development of packages to link businesses and attractions, a link between Yea Wetlands Discovery Centres, Snobs Creek Freshwater and Toolangi Forest, new accommodation and conference centres including Lake Mountain Eco-Lodge, Marysville Conference Centre and Mt Pinger Resort. Other potential products include a list of adventure-based assets and infrastructure and increased cycling opportunities to build upon existing mountain bike infrastructure and bike events within the municipality.

EVENTS MANAGEMENT STRATEGY FOR MURRINDINDI SHIRE COUNCIL

The Events Management Strategy prepared by GTR Events outlines a series of actions which could be undertaken by Murrindindi Shire Council to support and attract new events to the municipality.

The Strategy outlines 5 actions to improve events within Murrindindi and are:

1. Creation of 4 major annual events: *proposed events include a major cycling event to be held in summer, Eildon BBQ event in Autumn, a Christmas in July event and a Sculpture Walk to be held in Spring,*
2. Market the Brand: *Use year-round events to promote the region to increase tourism,*
3. Leverage Stakeholders: *work with stakeholders including government and non-government to develop partnerships to participate and provide input to an events strategy,*
4. Impact: *ensure events hosted have the desired economic and tourism impact; and*
5. Business Model: *ensure that Murrindindi's event model is financially supported by Visit Victoria and that Council is a sponsor of events and supports event owners to deliver the Event Strategy including through financing event development.*

MURRINDINDI SHIRE REGIONAL EVENTS STRATEGY, 2015 – 2020

The Murrindindi Shire Events Strategy 2015 to 2020 outlines the methods for Council to improve event opportunities within the municipality. The Strategy outlines an event criterion which categorises events as a tier one, tier two or tier three event:

- Tier 1: Major events that have potential to attract inter and intrastate visitors annually;
- Tier 2: Medium sized-events with capacity to attract visitors from Victoria annually;
- Tier 3: Local events of significance to the local community.

The Strategy, based upon a review of other successful events both within and outside of the region, includes recommendations to build upon regional product strengths such as Lake Eildon and waterways, culture and arts, music, cycling and automotive, through the improvement of existing or the development of new events.

Existing events identified as needing continued support include:

- Big Fish Challenge;
- Yea Arts Carnivale;
- Foggy Mountain Bluegrass Festival; and
- Truck, Ute and Rod Show.

Examples of potential new events include:

- A "House Boat Opening Weekend" to promote the opening of the houseboat season; and
- New seasonal cycling events as part of the Super Series.

The Strategy also recommends the development of a seasonal event calendar as well as a marketing strategy, to support the small but successful events in the Marysville region. Other opportunities include to improve the marketing of outdoor activity events and the development of seasonal events. This includes the development of a 'Spring theme' to attract visitors to the region's food, wine and music and arts products in Spring and the development of a 'winter sports and recreation' event to attract a greater number of visitors to Lake Mountain in Winter.

The Strategy also identifies hosting corporate events (tier 2 and 3) as an opportunity for Murrindindi Council. To ensure the success of existing and potential new events, the Strategy outlines the need for an Event Development Framework, which involves collaboration both across shire boundaries and industry sectors.

Y WATER DISCOVER CENTRE AT YEA WETLANDS STRATEGIC PLAN 2017 – 2021

The Strategic Plan 2017 – 2021 for the Y Water Centre is the major plan to guide the future development and growth of the Y Water Discovery Centre. The multi-purpose centre provides a range of services and activities including being a accredited Visitor Information Centre, hosting learning programs relating to water

and the environment, hosting a range of events such as meetings and showcasing and supporting local businesses and artisans.

The Plan outlines a series of strategic priorities for the Centre over the period between 2017 and 2021. These strategic priorities are to build upon the existing activities undertaken at the Centre and include:

1. Being an “outstanding” Visitor Information Centre;
2. Being the Yea Wetlands educational and cultural experience;
3. Governance and Partnerships;
4. Community Engagement; and
5. Facilities and Amenities.

GREAT VICTORIAN RAIL TRAIL STRATEGIC PLAN, 2013

The Strategic Plan for the Great Victorian Rail Trail (GVRT) provides a plan for the future of the trail, including the identification of actions required to establish the rail trail as an experience of national significance and the identification of operational management.

The Strategic Plan includes a Marketing Plan, which identifies the following 3 significant phases of development for the GVRT:

- 2013 – 2014 Consolidation
- 2014 – 2015 Growth
- 2015 – 2016 Aspiration

The Marketing Plan outlines 5 key actions as the foundations for sustainable growth of the GVRT. These actions underpin the development of the GVRT in each phase of the Strategic Plan.

1. Marketing
2. Management and administration
3. Product development
4. Infrastructure development

5. Industry support and development

The Operational Guide outlines the following tools as imperative to the management of the GVRT:

- Brand Style Guide: *the brand manual which provides guidelines for all design work relevant to the GVRT,*
- Signage Plan: *the signage manual which provides all relevant signage information for the GVRT,*
- Website: *the website is a ‘destination site’ within Tourism North East’s (TNE) Regional Digital Platform, and High Country Reservations (HCR) is contracted to manage the operational aspects of the website,*
- Toolkit 1 – Prospectus: *available online and features products available for purchase by industry, which include: website listings, GVRT Guide, and Signage,*
- Toolkit 2 – Activities within the GVRT Reserve: *online information and enquiry package available to members of community, industry and business who want to use the GVRT Reserve for events, activities, programs or initiatives,*
- Strategic Plan

GREAT VICTORIAN RAIL TRAIL SIGNAGE PLAN, 2013

The Great Victorian Rail Trail Signage Plan 2013, outlines where type and where signs should be located along the Rail Trail. Signage types in Gateway towns (off trail), Major Hubs, minor hubs, station sites (no hub) and points of interest hubs. Other signage includes entry point orientation signs at carpark trial entry points, safety and warning signs and directional signs.

The Plan outlines signs are to improve visitor/user experience, have a balance of ‘need to know’ and ‘like to know’, be location in a logical position, not create false stopping points. Oversaturation and proliferation is also identified as needing to be avoided.

ALEXANDRA, THORNTON AND EILDON TRAIL LINK FEASIBILITY STUDY, 2014

The Alexandra, Thornton and Eildon Trail Link Feasibility Study 2014 assesses the viability of a multi-use trail to link to the Great Victorian Rail Trail.

The study found that the trail would be feasible and achieve economic outcomes as well as increasing visitor numbers to the region by approximately 6,000. The Study found that there is a market for the trail and the route of trail is viable as well as being value for money. The Study also identified other benefits of trail link as increasing the connectivity of the local community and providing new recreational opportunities as well as providing opportunity to build upon businesses already existing in the local area.

To support the trail, the Study also includes a project implementation plan and outlines the potential trail management potential funding sources.

3. VISITOR ECONOMY PROFILE

3.1. INTRODUCTION

This section provides an overview of visitation and visitor characteristics in Murrindindi Shire, compared to the GRV region and regional Victoria as appropriate.

This assessment draws on data collected by Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS) to analyse trend and demographic data for both domestic and international visitors to the region

3.2. KEY FINDINGS

Visitation to Murrindindi Shire was 1,032,956 visitors in 2018, comprised of predominately day trip visitors (72%), followed by overnight trip visitors (27%). The visitor economy contributes \$94.1 million and 493 jobs to the Murrindindi economy.

Visitors	Tourism Output	Tourism Jobs
1,032,956	\$94.1M	493

Visitation to Alexandra, Marysville and Eildon accounts for 62% of visitation to the Shire. This is likely due to more developed and widely recognised natural assets, tourism products and destinations in these sub-regions such as Lake Eildon, Marysville and Lake Mountain.

88% of domestic visitors originate from Victoria, with 55% of these visitors from Melbourne's East and North regions. Therefore, there is strong opportunity to target Melbourne's North and East regions.

The domestic target markets for Murrindindi Shire will be focused towards older couples, younger families, nature-based visitors and the Lifestyle Leader market. Although international visitation is quite low in Murrindindi (2%), the Asian visitor market is a key emerging market for Murrindindi.

Murrindindi Shire has very similar visitation patterns to the neighbouring Mansfield Shire, particularly in terms of purpose of visit for both day trip and overnight visitors, and in terms of visitor origin for overnight visitors.

3.2.1. SUB REGION VISITATION

Murrindindi Shire attracts 1,032,956 visitors **per annum** (Figure 1). Over half of those visitors are visiting the Alexandra and Marysville area.

The Shire attracts 745,769 day-trippers (73%), 283,405 overnight visitors (27%) and 3,782 international visitors.

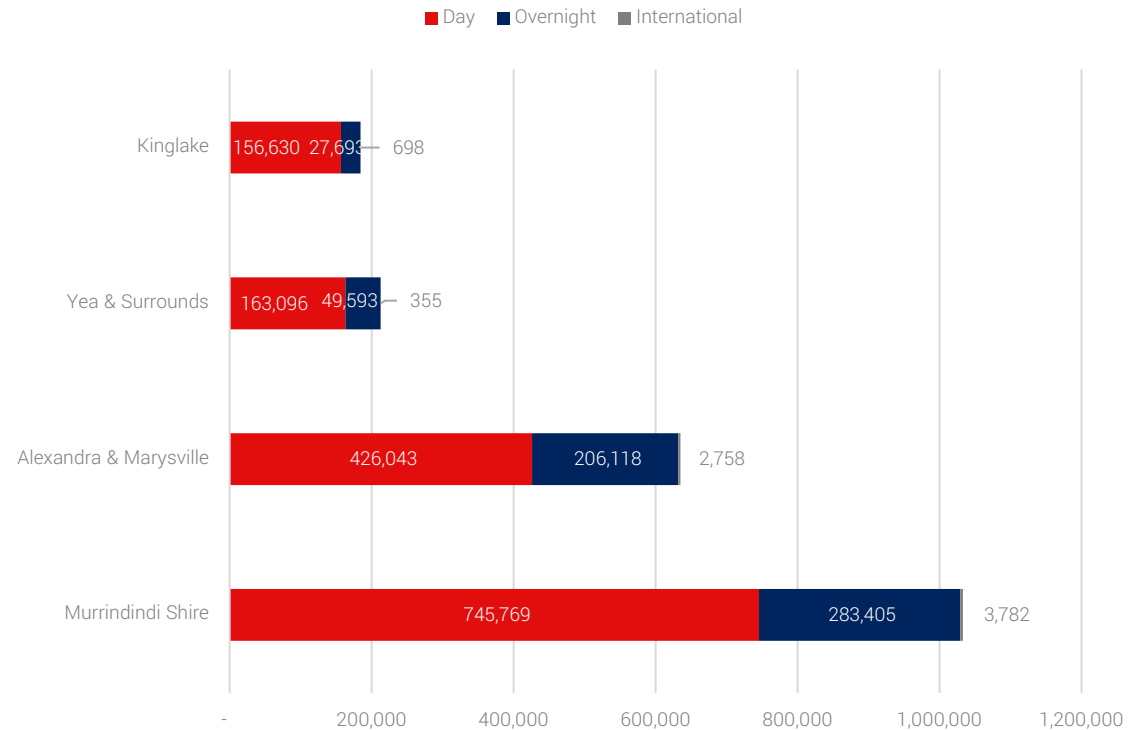
The reason for the high level of daytrip visitation is likely due to the combined low supply of visitor accommodation, proximity to Metropolitan Melbourne, and proximity to large regional centres in the North East of Victoria such as Shepparton and Wangaratta.

Alexandra and Marysville Area attracts the majority of daytrip (67%) and overnight (33%) visitors in the Shire. This could be due to the large number of environmental assets in the region, as well as a larger VFR market staying overnight in Alexandra due to the higher population base in Alexandra (24%).

Yea is likely to attract a higher number of visitors than captured in the official data, due to visitors passing through but not staying more than 4 hours.

Kinglake and Yea Areas have an exceptionally low proportion of overnight visitation. A key focus of the tourism strategy will be to grow overnight visitation.

F1. VISITATION TO MURRINDINDI SHIRE AND SUB REGIONS/AREAS



Source: TRA, NVS & IVS Visitation, Financial Year 2013/14 - 2017/18 (5 year average).

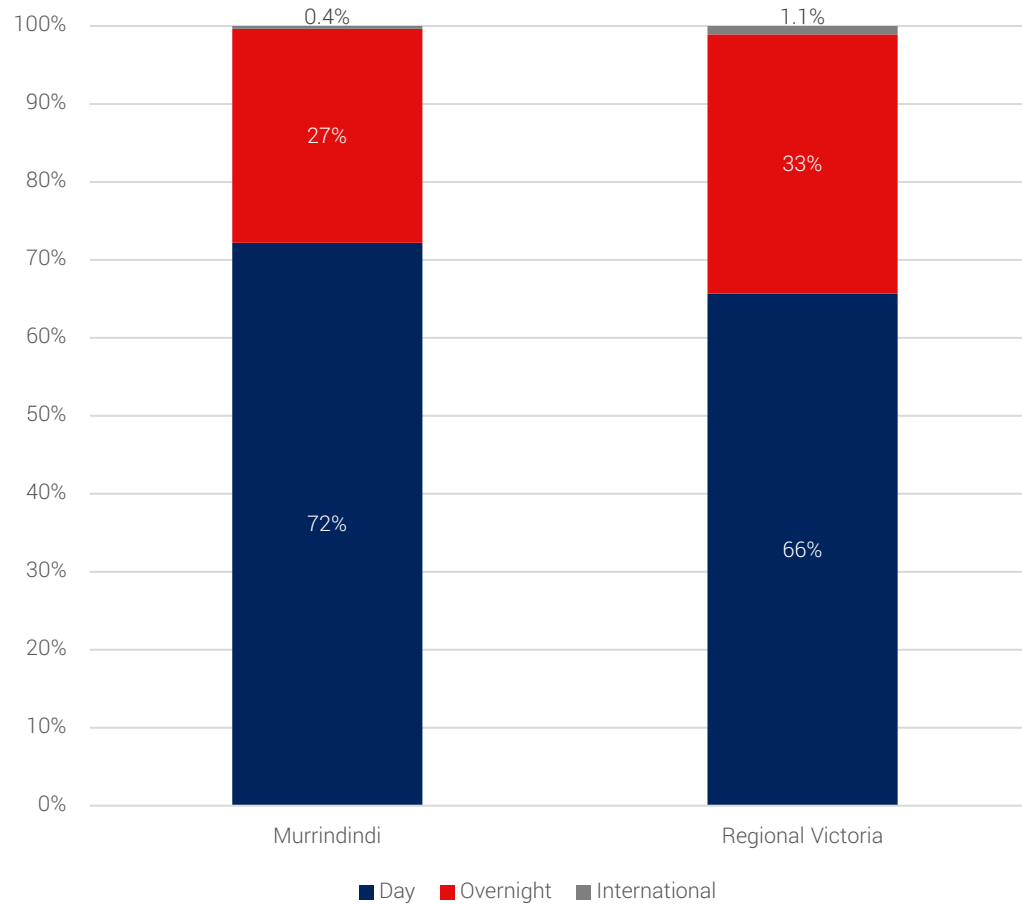
3.2.2. PROPORTION OF DAY TRIPS/OVERNIGHT TRIPS

In 2018, Murrindindi Shire attracted an average of 1,032,956 visitors.

The largest proportion of visitors were visiting on a daytrip (72%), which is significantly higher than the proportion of day trip visitors to Regional Victoria (66%). This is likely to be due to the Shire's proximity to Melbourne.

A key focus for the strategy will be converting day trips to overnight visitors.

F2. MURRINDINDI SHIRE VISITATION BY MARKET AND PROPORTION (2017/18)



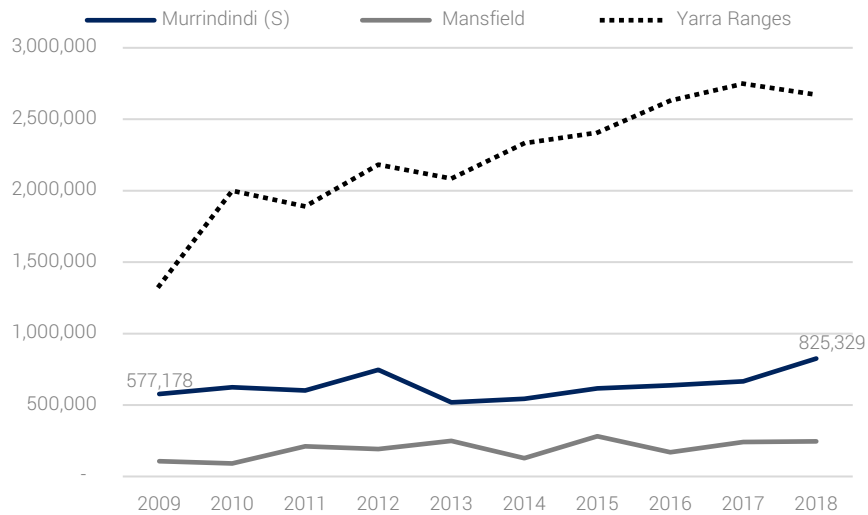
Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

3.2.3. VISITATION TRENDS

DOMESTIC DAYTRIP VISITATION

Over the period 2009- 2018 annual domestic daytrip visitation to Murrindindi Shire grew from approximately 577,178 visitors in 2009 to 825,329 visitors in 2017/18. This growth was not consistent however, with the Shire experiencing a peaks and troughs in visitation.

F3. DOMESTIC DAYTRIP VISITATION TREND 2009-2018



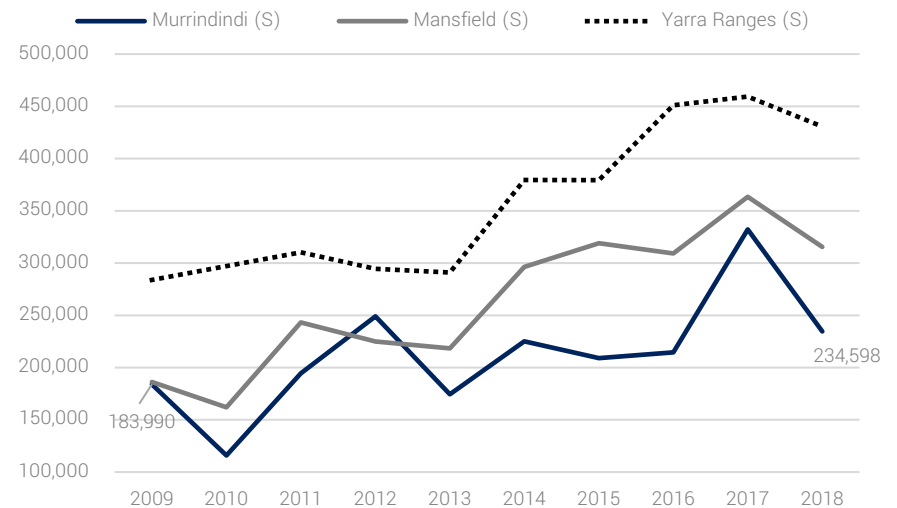
Source: TRA CDMOTA NVS, Calendar Year 2009-2018.

DOMESTIC OVERNIGHT VISITATION

The number of domestic overnight visitors to Murrindindi Shire, in the period 2009-2018, grew from approximately 183,990 visitors in 2009 to 234,598 visitors in 2018. This growth was inconsistent over the 10-year period, with a number of troughs occurring, particularly over the years following the Black Saturday bushfires.

The inconsistent growth was also reflected in the number of domestic overnight visitors to Yarra Ranges & Mansfield, with a number of peaks and troughs also occurring in the region. The Yarra Ranges has seen more steady upwards growth than Murrindindi Shire and Mansfield Shire, however.

F4. DOMESTIC OVERNIGHT VISITATION TREND 2009-2018



Source: TRA CDMOTA NVS, Calendar Year 2009-2018.

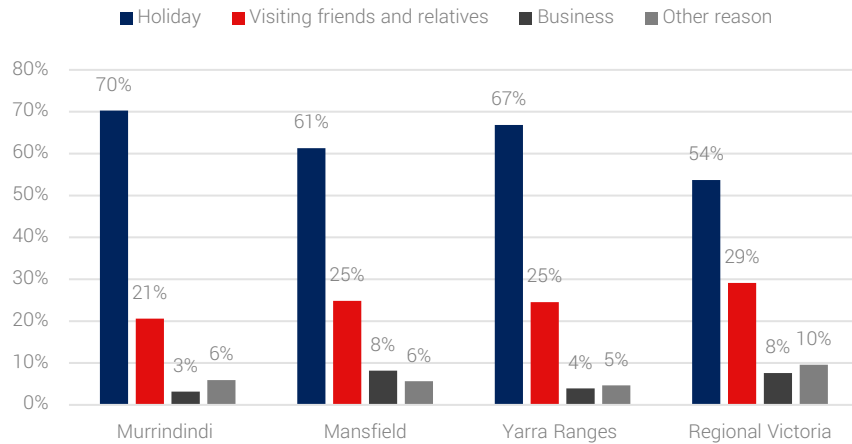
Murrindindi Shire has not attracted any significant growth in overnight visitors. This is potentially due to lack of new accommodation product and limited effective marketing efforts.

3.3. DOMESTIC DAYTRIP VISITORS

PURPOSE OF VISIT

The primary purpose of visit for domestic daytrip visitors to Murrindindi Shire was for a holiday (70%), and the secondary purpose of visit was visiting family and friends (21%). The proportion of visitation reasons to Murrindindi are almost identical to Mansfield Shire. Murrindindi Shire has much higher levels of holiday visitation and lower levels of VFR than Regional Victoria.

F5. DOMESTIC DAYTRIP PURPOSE OF VISIT (%)



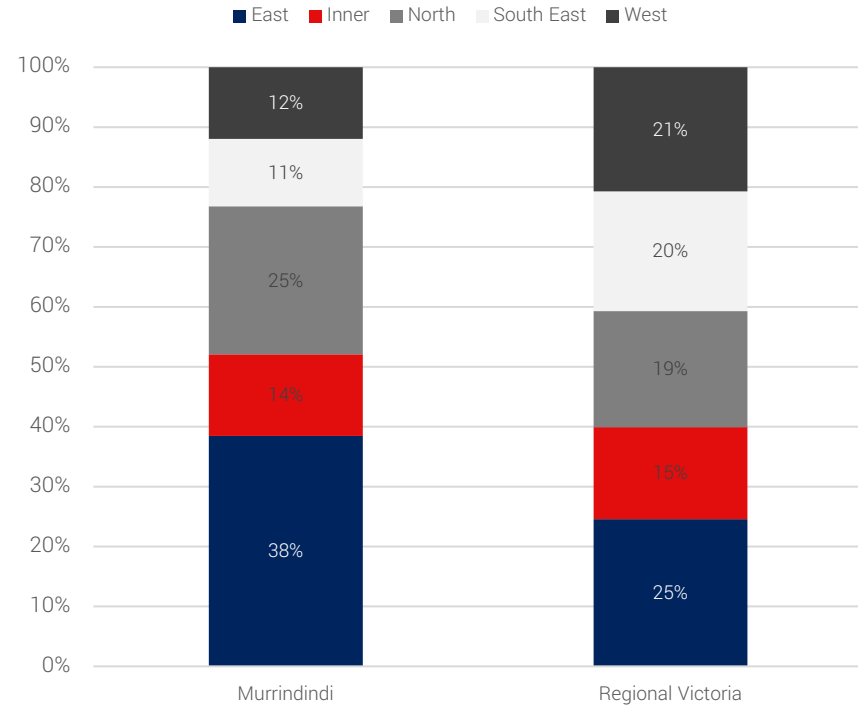
Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

ORIGIN

All (100%) of domestic daytrip visitors to Murrindindi Shire have originated from within Victoria.

63% of visitors from within Melbourne originate from Melbourne's North and East regions, as shown in F6. This presents a significant opportunity to target marketing and promotional efforts towards these regions to increase visitation.

F6. VISITOR ORIGIN WITHIN MELBOURNE, BY DESTINATION MELBOURNE CAMPAIGN SUB-REGION (%)

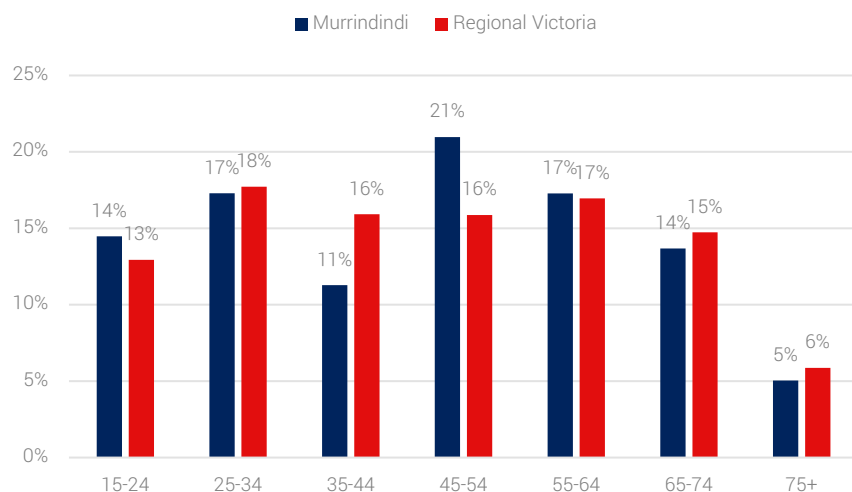


Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

AGE

Murrindindi has a higher proportion of visitors aged between 45- 54 (21%) than regional Victoria (16%), however the visitor profile is generally consistent with that of Regional Victoria.

F7. DOMESTIC DAYTRIP VISITOR AGE PROFILE (%)



Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

TRIP ACTIVITIES

Murrindindi Shire has a much higher proportion of visitors sightseeing/looking around (31%) and bushwalking/rainforest walks (30%) than regional Victoria (21% and 8%, respectively). There are much lower proportions of visitors in Murrindindi visiting friends and relatives (25%) compared to Regional Victoria (34%).

T1. DAYTRIP ACTIVITIES UNDERTAKEN

Activities	Murrindindi	Regional Victoria
Eat out / dine at a restaurant and/or cafe	53%	51%
Sightseeing/looking around	31%	21%
Bushwalking / rainforest walks	30%	8%
Visit friends & relatives	25%	34%
Visit national parks / state parks	23%	8%
Picnics or BBQs	9%	4%
Go shopping for pleasure	7%	16%
Pubs, clubs, discos etc	7%	7%
None of these	7%	9%
Fishing	6%	2%
Other outdoor activities nfd	6%	2%
Exercise, gym or swimming	6%	3%
Visit botanical or other public gardens	4%	4%
Visit history / heritage buildings, sites or monuments	4%	3%
Visit wineries	4%	2%
Go to markets	3%	3%
Visit farms	3%	1%
Attend festivals / fairs or cultural events	3%	2%

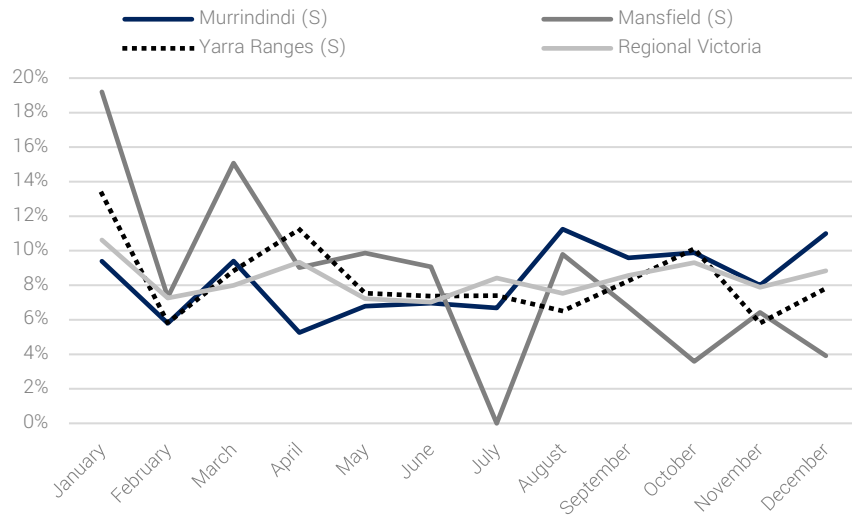
Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

Activity data confirms that Murrindindi is predominately a nature-based tourism destination, with higher than average visitors participating in bushwalking, visiting national/state parks, fishing and skiing.

SEASONALITY

Visitor daytrips to Murrindindi is variable across the year, with the greatest peaks in the months of August and December. The visitation trend is much more seasonal than regional Victoria, however less seasonal than Mansfield and Yarra Ranges Shires.

F8. DAYTRIP SEASONALITY OF VISIT (%)



Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

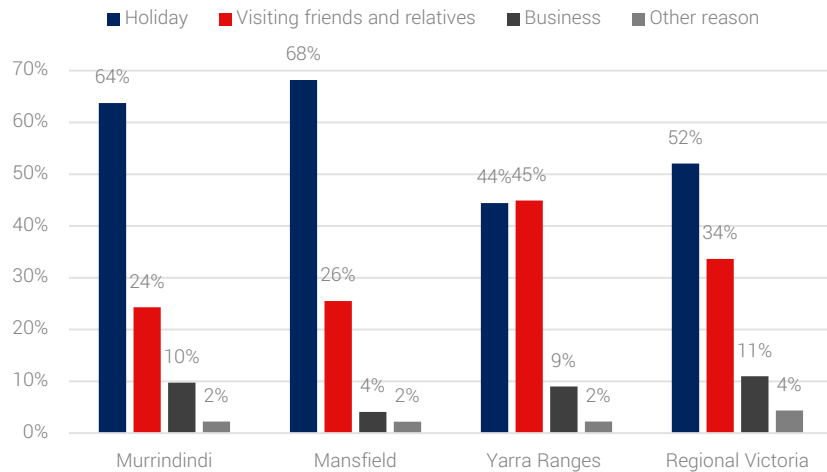
3.3.1. DOMESTIC OVERNIGHT VISITORS

PURPOSE OF VISIT

The primary purpose of overnight visits to Murrindindi Shire was for a holiday (64%), followed by visiting family and friends (24%). F99 shows that there is a much lower proportion of overnight visitors travelling to Murrindindi to visit relatives or friends regional Victoria and other neighbouring LGA's. This indicates a large proportion of visitors travelling to the region for leisure and recreation.

Similar to the purpose of visit for day-trippers, the proportion of visitation to Murrindindi is almost identical to that of Mansfield.

F9. OVERNIGHT PURPOSE OF VISIT (%)



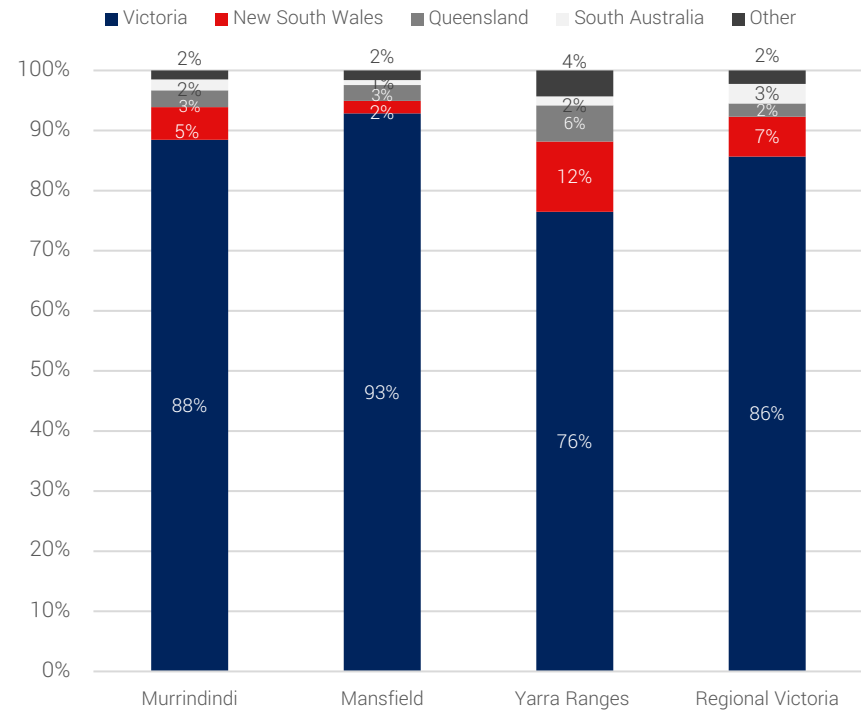
Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

Murrindindi is a true holiday and leisure destination, with the vast majority of visitors visiting for this purpose.

ORIGIN

88% of domestic overnight visitors to Murrindindi Shire originated in Victoria (F1010), with 5% of overnight visitors originating from New South Wales. The majority of overnight visitors to regional Victoria also originated in Victoria (86%).

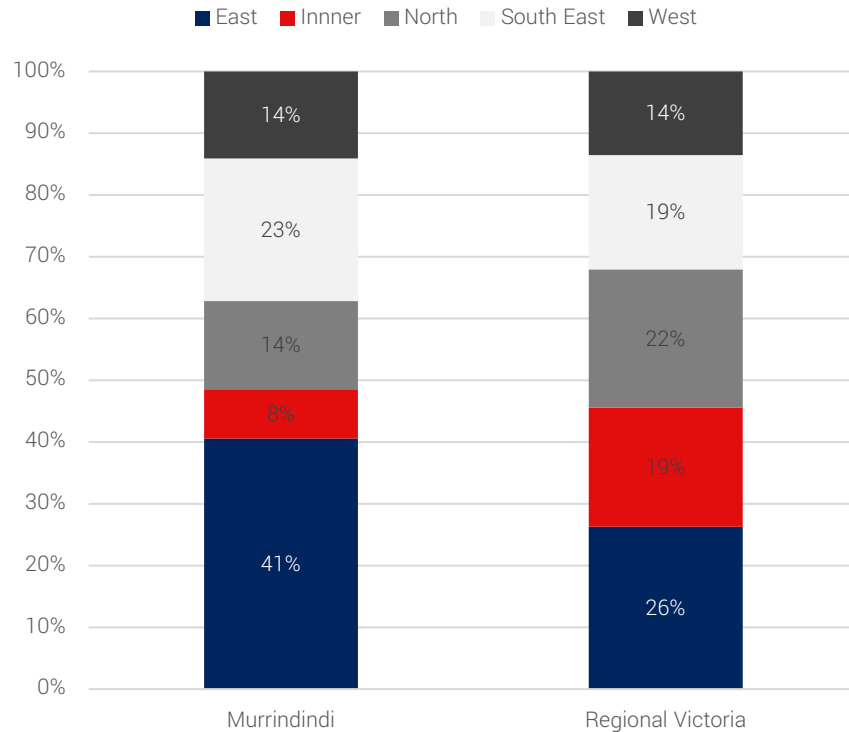
F10. OVERNIGHT VISITOR ORIGIN, BY STATE (%)



Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).% have been rounded so may not equal 100%.

F111 shows that of these visitors, 41% are from Melbourne’s East and 23% are from Melbourne’s South East. This is consistent with observations made by local tourism businesses and associations, as identified through extensive community engagement.

F11. VISITOR ORIGIN WITHIN MELBOURNE, BY DESTINATION MELBOURNE CAMPAIGN SUB-REGION (%)



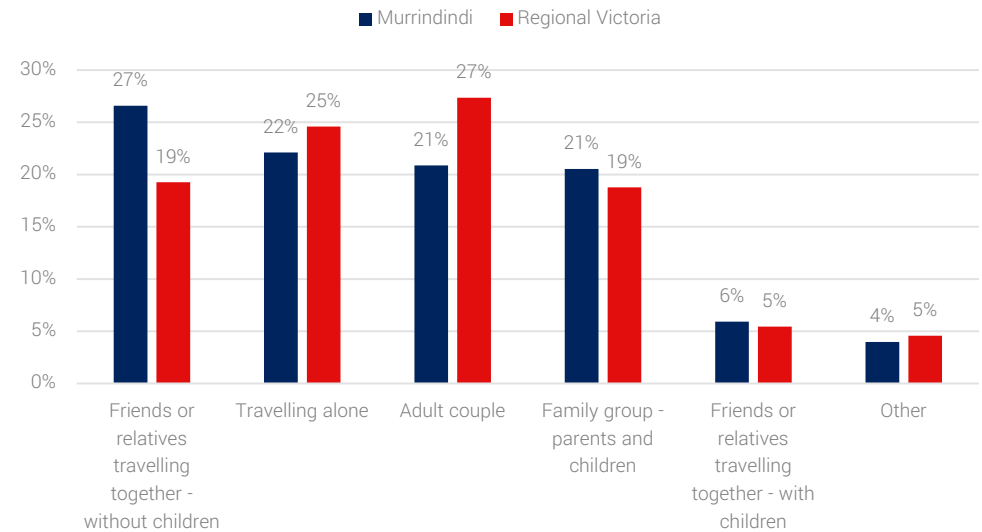
Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

TRAVEL GROUP

The primary overnight travel groups to Murrindindi Shire are friends or relatives travelling together (no children; 27%) and family group (parents and children; 21%)

The second most common travel group is adult couples, accounting for 21% of travel party types. Visitation regional Victoria (refer Figure 12).

F12. OVERNIGHT TRAVEL GROUP (%)



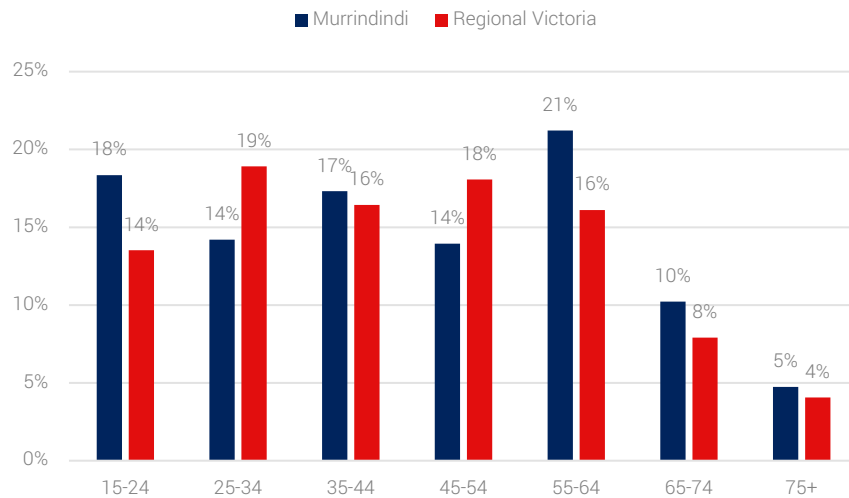
Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

AGE

Murrindindi Shire has a higher proportion of visitors aged between 15-24 (18%) than regional Victoria (14%), and a higher proportion of older visitors between 55-64 (21%) compared to regional Victoria (16%).

The proportion of visitors aged between 25-54 is relatively consistent with regional Victoria.

F13. OVERNIGHT AGE PROFILE IN 10 YEAR GROUPS



Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

TRIP ACTIVITIES

There is a much higher proportion of visitors participating in nature-based activities in Murrindindi than regional Victoria. This includes bushwalking/ rainforest walks (Murrindindi 33%; regional Victoria 16%), visit national parks/ state parks (Murrindindi 27%; regional Victoria 15%), fishing (Murrindindi 17%; regional Victoria 6%), water activities (Murrindindi 9%; regional Victoria 4%), and other outdoor activities (Murrindindi 11%; regional Victoria 4%).

46% of overnight visitors to Murrindindi Shire eat out / dine at a restaurant and/or café, which is lower than the rest of regional Victoria (57%).

T2. OVERNIGHT VISITOR ACTIVITIES BY PARTICIPATION (%)

Activities	Murrindindi	Regional Victoria
Eat out / dine at a restaurant and/or cafe	46%	57%
Bushwalking / rainforest walks	33%	16%
Visit friends & relatives	31%	43%
Sightseeing/looking around	27%	28%
Visit national parks / state parks	27%	15%
Pubs, clubs, discos etc	24%	21%
Fishing	17%	6%
Picnics or BBQs	11%	7%
Other outdoor activities nfd	11%	4%
Go shopping for pleasure	10%	16%
None of these	10%	7%
Water activities / sports	9%	4%
Exercise, gym or swimming	8%	7%
Play other sports	6%	4%
Go on a daytrip to another place	6%	5%
Visit botanical or other public gardens	6%	4%
Visit wineries	6%	5%
Go to markets	5%	7%
Visit history / heritage buildings, sites or monuments	5%	6%

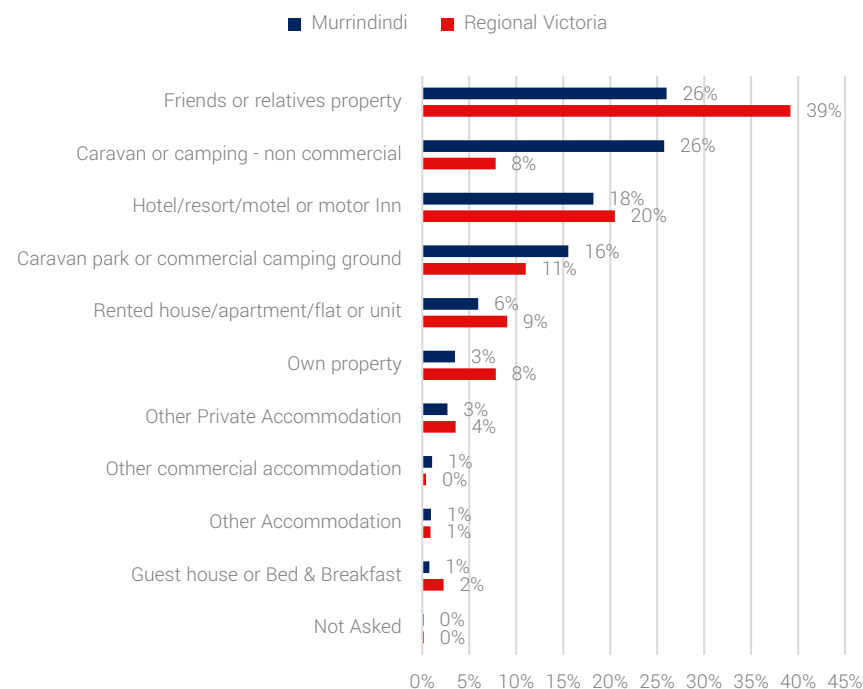
Visit food markets (2016 onwards)	4%	2%
Attend festivals / fairs or cultural events	3%	3%
Visit museums or art galleries	3%	5%
Cycling	2%	3%
Golf	2%	2%
Snow skiing	1%	2%
Go on guided tours or excursions	1%	1%
Visit farms	1%	2%
Visit wildlife parks / zoos / aquariums	1%	1%
Attend an organised sporting event	1%	3%
Other activities	1%	1%
Visit industrial tourist attractions / mines / breweries (breweries excl 2016 onwards)	1%	1%

ACCOMMODATION TYPE

The primary accommodation type for visitors to Murrindindi Shire is a friends or relatives property and caravan and camping (national park/ crown land) (each 26%). Staying at a friends or relatives property is also the most common type of accommodation for overnight visits in regional Victoria (39%).

Other common accommodation types in Murrindindi Shire were standard hotel/motor inn (18%). A higher proportion of visitors to regional Victoria (20%) stayed in a standard hotel/motor inn than in the Murrindindi Shire (refer Figure 14).

E14. OVERNIGHT ACCOMMODATION TYPE (%)



Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

Given the strong cycling credentials of Murrindindi, including mountain biking in Kinglake and Lake Mountain, road cycling and the Great Victorian Rail Trail, cycle visitation is low. Leveraging from High Country's RIDE campaign could be an effective way to drive cycle visitation to the region.

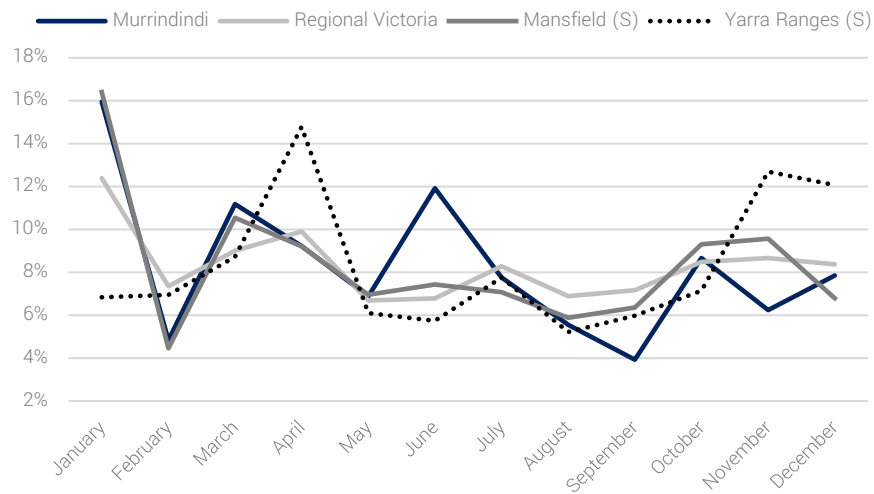
Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

SEASONALITY

Overnight visitation to Murrindindi Shire is relatively variable, with several peaks and troughs occurring throughout the year. Months experiencing the greatest visitation include January, March, June, October and December. This pattern in visitation is quite different to visitation to regional Victoria (refer Figure 15).

The significant peak in overnight visitation in January could be due to the summer holiday period, whereas the peak in visitation in June is likely due to the Alexandra Truck, Ute and Rod Show, which attracts over 12,000 visitors annually, and visitors to Lake Mountain in winter.

F15. OVERNIGHT SEASONALITY OF VISIT (%)



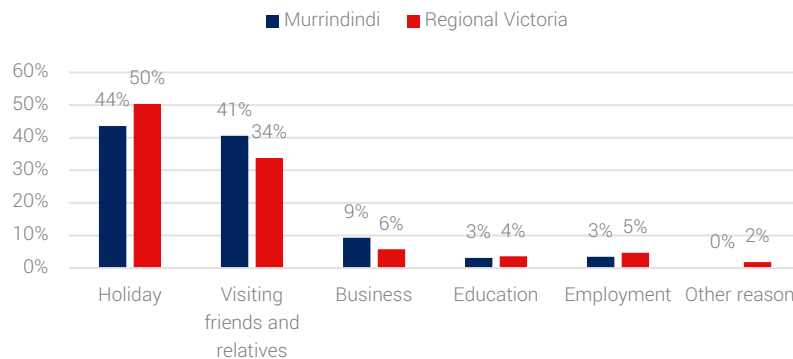
Source: TRA CDMOTA NVS, Calendar Year 2017- 2018 (2 year average).

3.3.2. INTERNATIONAL VISITORS

PURPOSE OF VISIT

The primary purpose of international visits to Murrindindi is for a holiday (44%), followed by 41% of visitors to the Murrindindi Shire visiting friends and relatives. This is higher than the 50% of visitors to regional Victoria visiting for a holiday. It is important to note that there are no visitors to the shire for employment purposes, indicating a low supply of jobs.

F16. INTERNATIONAL PURPOSE OF VISIT (%)



Source: TRA CDMOTA IVS, Calendar Year 2017- 2018 (2 year average).

ORIGIN

15% of international visitors to Murrindindi Shire are from the United States of America and Malaysia (each), which is significantly higher than the proportion of visitors to regional Victoria (9% and 11%). Murrindindi has a much higher proportion of international visitors originating from Singapore and New Zealand (12% and 11%

each) than regional Victoria (4% and 2%, respectively). This indicates that, along with higher visitor numbers from Thailand and Taiwan, the Asian market is an emerging target market for Murrindindi.

T3. INTERNATIONAL COUNTRY OF ORIGIN (%)

Country	Murrindindi	Regional Victoria
Malaysia	15%	9%
United States of America	15%	11%
Thailand	12%	14%
Singapore	12%	4%
New Zealand	11%	2%
Switzerland	10%	6%
Taiwan	5%	2%
United Kingdom	5%	2%
India	3%	2%
Netherlands	2%	3%
China	2%	5%
Scandinavia	2%	5%
Japan	2%	4%
Canada	1%	3%
Hong Kong	1%	1%
Indonesia	1%	3%
Italy	0%	1%
Other Asia	0%	2%
Other Europe	0%	2%
Other Countries	0%	3%
Germany	0%	1%
France	0%	13%
Korea	0%	2%

Source: TRA CDMOTA IVS, Calendar Year 2017- 2018 (2 year average).

3.4. ECONOMIC IMPACT ASSESSMENT OF VISITOR ECONOMY

The Murrindindi Shire regional economy profile measures the economic contribution of tourism to the region both in absolute level terms and as a contribution to the regional economy.

In 2016-17, the visitor economy for Murrindindi contributed 493 jobs and generated \$94.1 million in output. This represents 8% of the total economic output in Murrindindi's economy, and 12% of total jobs in Murrindindi. Tourism is the third largest industry of employment for Murrindindi.

F17. ECONOMIC IMPACT OF TOURISM IN MURRINDINDI



Source: REMPlan Economy Profile, Murrindindi Shire, 2016-17.

3.6. MARKET SEGMENTATION

The existing primary markets within Murrindindi include nature-based tourism visitors, families and family groups, and adult couples. Many of these visitors are considered to be habitual visitors; either owning a holiday home, annual caravan site or are regular camping/caravan visitors to the region. They tend to be a low-yield market, who self-cater and spend limited money on activities or accommodation in the region.

Anecdotal evidence from businesses suggests the vast majority of visitors to the region are from Melbourne’s north and east.

Asian and Indian visitors are increasingly being drawn to destinations such as Marysville which are close in proximity to Melbourne and have high amenity country side. Many of the Asian and Indian visitors are migrants to Australia or are here for education.

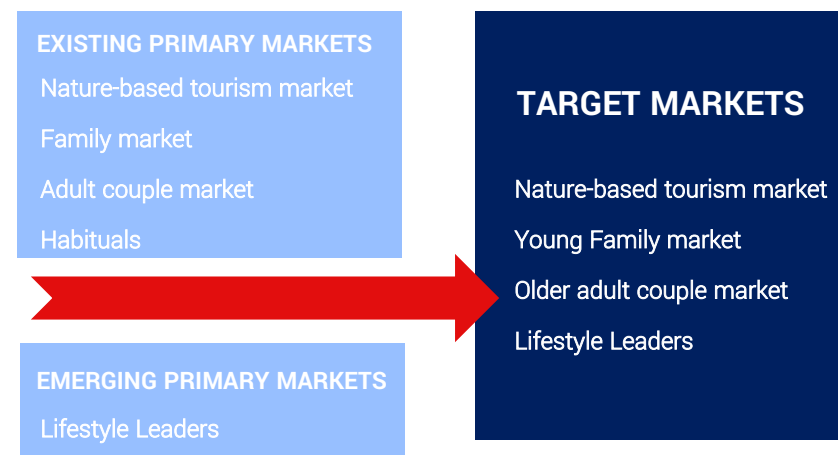
Many other destinations in close proximity to Melbourne such as the Mornington Peninsula, Geelong and the Bellarine, Yarra Valley and Daylesford Macedon Ranges are key weekend playgrounds for Melbournians. Murrindindi has landscapes, nature-based assets and amenity that rivals many of these destinations. It is however largely undeveloped by comparison.

3.6.1. TARGET MARKETS

The emerging primary market, as defined by Visit Victoria, is the Lifestyle Leader market, who are the highest yielding visitor market and represent the largest market segment in Victoria.

The target markets are similar to the existing primary market, but there is a focus towards targeting older couples and younger families. Nature-based visitors will remain a key visitor group for Murrindindi, as Murrindindi has an abundance and variety of natural assets. The Lifestyle Leader market will be the biggest focus for Murrindindi Shire, as they will travel to Murrindindi to explore the natural assets, whilst spending money on high quality, up-market food, wine and cultural experiences.

F19. TARGET MARKETS



EMERGING DOMESTIC VISITOR MARKET – LEADING LIFESTYLES

The key domestic target market for Murrindindi Shire has been identified as the ‘Lifestyle Leaders’ market, as defined and targeted by Visit Victoria. Lifestyle Leaders are based on a mindset, are found in all regions, ages and lifecycle groups and represent approximately a third of the Australian population aged 18+.

The campaign targets Victorians, with its primary focus being on Melbourne based ‘lifestyle leaders’. They represent 35% of the total Greater Melbourne population (aged 18+).

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

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

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

INSPIRED BY NATURE

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

This is the key Lifestyle Leader segment for Murrindindi Shire to target.

CREATIVE OPINION LEADERS

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

FOOD AND WINE LIFESTYLERS

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

ENRICHED WELLBEING

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

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

INTERNATIONAL VISITORS - EXPERIENCE SEEKERS

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

3.7. STRATEGIC CONSIDERATIONS

- **Low midweek visitation.** Visitation to Murrindindi is highly concentrated to weekends. This presents issues for business sustainability and also the ability for businesses to maintain a full time workforce.
- **More than 2/3s of visitors are daytrippers.** More than two thirds of visitors to Murrindindi Shire are daytrippers. Whilst proximity to Melbourne is a reason for this, there are locations such as Yea and Kinglake which have limited visitor accommodation product which impacts on their ability to attract overnight visitors.
- **Stagnant visitation.** Visitation over the past years has been generally stagnant. There has been some growth in day-trippers, but almost no growth in overnight visitation since before the Black Saturday bushfires. Whilst there has been a build period following Black Saturday, there has been little growth in the last four-five years.
- **Target Melbourne's North and East.** There are around two million people within 1.5 hours of Murrindindi's towns and villages. Targeted marketing and awareness campaigns into these areas should be considered a priority for Murrindindi.
- **Families.** Murrindindi is well suited for the family market. Development of family friendly product and focused marketing to families should be considered for the region. The waterways of the region, nature-based product and accessibility make Murrindindi an excellent fit for the family market.
- **Asian and Indian Visitors.** Whilst many of these visitors are not considered high yield currently, they could be a key market to focus on as these segments mature over the next 10 years.
- **High end visitors.** Murrindindi through Cathedral Golf Club is beginning to attract high flyers who are visiting the region. There is opportunity to promote other products and experiences to this market.
- **Melbourne's backyard.** There is opportunity to position Murrindindi's destinations as Melbourne's backyard to grow the awareness of the region in the key Melbourne marketplace

4. PRODUCT PROFILE

4.1. INTRODUCTION

This section provides an overview of product strengths and experiences in the Murrindindi Shire Council and emerging product opportunities. This analysis is based on audits of tourism products in Murrindindi Shire and input from stakeholders and community through consultation. Key findings of a survey sent out to local businesses and tourism associations are also summarised where relevant.

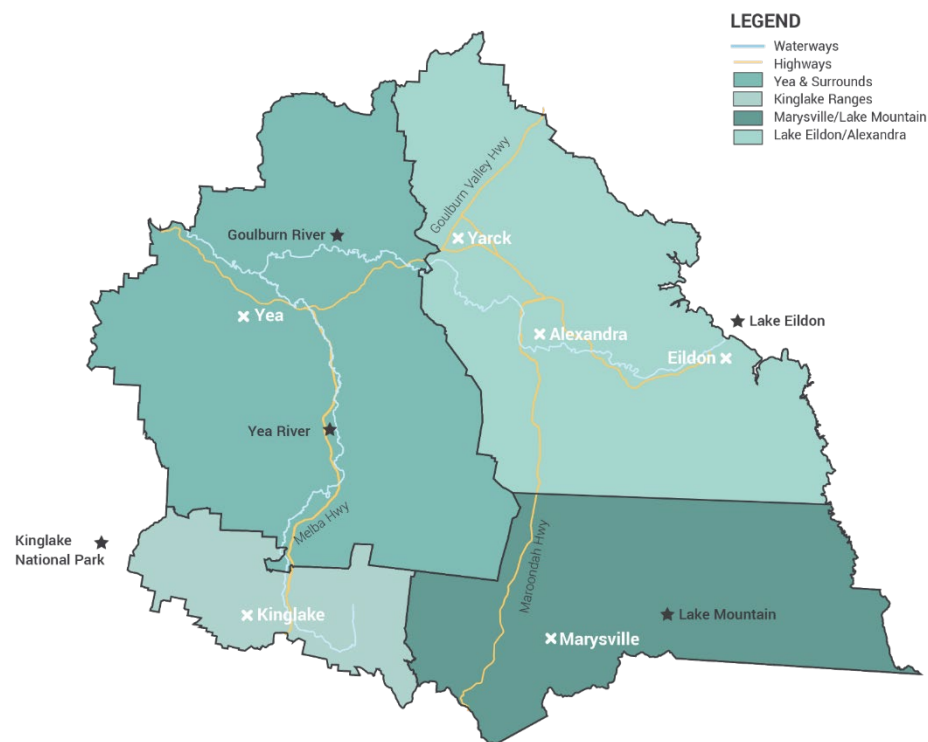
SUB-REGIONAL DESTINATIONS

The product profile sub-divides the region into 4 key destination clusters. These are generally based on the differences in the product strengths and experiences on offer in key visitor nodes; and the proximity and potential synergies with surrounding tourism regions and products.

These sub-regional destination clusters are:

- **Kinglake Ranges** – Characterised by its proximity to both Melbourne and the Yarra Valley, and with a key product strength in natural attractions and associated experiences.
- **Yea and Surrounds** – Focused on north west of Murrindindi Shire, the key strengths of the sub-region include natural attractions and associated activities (such as Great Victorian Rail Trail and Cheviot Tunnel), wineries and events.
- **Lake Eildon/Alexandra** – This north-east cluster has key strengths in its natural attractions, water-based activities, and adventure activities.
- **Marysville/Lake Mountain** – This cluster has strengths in adventure activities (including cycling), alpine activities and food and wine. The sub-region is shaped by its proximity to both the High Country and Yarra Valley regions.

F20. SUB-REGIONAL DESTINATIONS



Source: Urban Enterprise, 2018.

4.1.1. KEY FINDINGS

Murrindindi Shire is a nature-based destination north east of Melbourne, with natural assets that provide opportunity for cycling, bushwalking, fishing, snow activities, hunting and other water-based recreation. It has emerging food and agribusiness and arts and heritage product to complement its nature-based strengths. Some of the key destinations that are key drivers of visitation to Murrindindi that can be further enhanced and marketed include:

- Lake Eildon and Lake Eildon National Park;
- Yarra Ranges National Park;
- Kinglake National Park;
- Cathedral Range State Park;
- Murrindindi Scenic Reserve;
- Rubicon Historic Area;
- Lake Mountain;
- Marysville; and
- Goulburn River and its tributaries.

Whilst Murrindindi Shire has high quality natural assets, there is a need for investment by the private sector in businesses that deliver new and improved food, beverage and accommodation product to the region. These products are critical to increasing yield and attracting high spend visitors to Murrindindi.



4.2. PRODUCT STRENGTHS

Murrindindi Shire's key strength is nature-based tourism, including snow, cycling, walking, hunting, fishing and water-based activities. Much of the product fits within these categories, including the majority of events and festivals. The region also has secondary strengths in food agri-businesses, and heritage, arts and culture. Development of these secondary strengths can be leveraged from the well-developed food, wine and cultural scenes in the Yarra Valley to the South.

Areas for growth or emerging product include accommodation and golf.

Table 4 illustrates the relative product strengths of each sub-regional destination based on the strengths of the wider region. The product strengths are categorised as:

- **Primary** – is a well-established strength of the region/sub-region, with mature and recognisable assets in the identified tourism product;
- **Secondary** – established strengths in the region/sub-region. However, not considered to be the number one tourism product. There is scope to further develop the product to improve product, awareness and profile.
- **Emerging** – there is evidence of an emerging tourism product in the region/sub-region, which is either new or relatively limited in scale. There could be scope to further develop the product to diversify the product offer.

T4. SUB-REGIONAL PRODUCT STRENGTHS COMPARISON

Product	Kinglake Ranges	Yea & Surrounds	Lake Eildon/Alexandra	Marysville/Lake Mountain
Nature Based Tourism	●	●	●	●
<i>Snow</i>			○	●
<i>Cycling</i>	●	●	●	●
<i>Walking</i>	●	●	●	●
<i>Hunting</i>	●	●	●	●
<i>Fishing</i>	●	●	●	●
<i>Water-based activities</i>		●	●	●
Food and agribusiness	●	●	●	●
<i>Wine</i>	-	●	●	●
<i>Restaurants/ Fine food</i>	-	●	●	●
<i>Farm gate</i>	●	●	●	●
<i>Distilleries</i>	●	●	-	-
Heritage, Arts & Culture	●	●	●	●
Golf	●	●	●	●

PRIMARY
 SECONDARY
 EMERGING
 OPPORTUNITY

4.3. NATURE-BASED

Murrindindi Shire has a diverse natural environment, with a number of significant national and state assets partly or wholly located within the Shire, including:

- **Lake Eildon National Park and Lake Eildon** – with Lake Eildon in particular a key asset for the region, drawing significant visitation across the year for camping, houseboating, fishing and other watersports and activities. Native bushland, wildlife and scenic views of Mt Buller can also be enjoyed along trails within Lake Eildon National Park.
- **Yarra Ranges National Park** – home to the Victoria Mountain Ash (*Eucalyptus regnans*), the tallest flowering plant in the world; as well as Lake Mountain and the associated Lake Mountain Alpine Resort including numerous walking tracks and ski trails.
- **Kinglake National Park** – promoted as being situated conveniently close to Melbourne and offering striking views of the Melbourne skyline, it provides a number of opportunities for visitors to go camping, bushwalking and enjoy the outdoors at a number of picnic spots including Masons Falls Picnic Area. Although much of the park is still in its regeneration phase following the 2009 fires, the park's 'natural revival' is in itself promoted as one of the selling points of the experience within this park. The Kinglake Ranges also have various mountain streams which are home to fishing and other water activities such as King Parrot Creek and the catchment for Yea River.
- **Cathedral Range State Park** - which offers activities such as rock climbing, fishing and camping, as well as a range of walking tracks of varying difficulties; and
- **Murrindindi Scenic Reserve** – which includes Wilhelmina Falls a popular camping and recreational area for families.

Across the sub-regions, other nature based assets and attractions include:

- **Kinglake and Surrounds:** Jehoshaphat Gully, Silvia Creek, King Parrot Creek, Masons Falls, Wombelano Falls, Toolangi State Forest, Wirra Willa Rainforest Walk, Canopy Tour, Mount Robertson State Forest;

- **Yea and Surrounds:** Y Water Discovery Centre, Tallarook State Forest, Strath Creek Falls; Black Range State Forest; and Yea Wetlands;
- **Lake Eildon/Alexandra:** Rubicon State Forest, Big River State Forest, Mount Torbreck, Snobs Creek Falls and Black Range State Forest; and
- **Marysville/Lake Mountain:** Marysville State Forest, Gallipoli Park, Steavenson Falls, The Beeches Rainforest, Keppel Falls and The Big Tree.

4.3.1. OUTDOOR ADVENTURE, SPORT AND RECREATION

This diverse natural environment supports a range of outdoor adventure, sport and recreation activities and experiences including:

- **Walking** – Murrindindi is home to a range of walking trails including within the National and State Parks and Forests. This includes the Marysville Trails Network, a total of 14 trails including Steavensons Falls Trail, Tree Fern Gully Trail, Michaeldene Trail, Keppel Lookout Trail, and the Lady Talbot Trails;
- **Fishing** – Fishing is a popular activity within the Shire, including at Lake Eildon, Buxton Trout & Salmon Farm and various other water bodies across the Shire;
- **Hunting** – including duck hunting at Lake Eildon and deer hunting in the Yea and surrounds sub region; and
- **Equine** – particularly horse-riding within the Kinglake Ranges sub region, as well as other community facilities such as Yea Racecourse.

SNOW-BASED ACTIVITIES

The annual snow season is a major asset of the Shire, with Lake Mountain Alpine Resort the closest ski resort to Melbourne, at less than 2 hours' drive away. The mountain supports a range of active and passive recreational uses. This includes cross country skiing, snowboarding, snow play, tobogganing, snow shoeing and winter walks during the winter season; whilst popular activities outside of winter include mountain biking, road cycling, bushwalking and Adventure Activities

Programs (including Flying Fox, Tube Run and Laser Skirmish). Lake Mountain also supports a range of events including the popular Wildflower Festival.

Mount Torbreck is located in close proximity to Eildon township. Accessibility to Mount Torbreck is restricted in winter by the inability to access the majority of the mountain in winter. Mount Torbreck presents a long-term opportunity to develop as a snow play and back country snow destination.

CYCLING

Cycling is a key growing strength of the region, with the Shire located on the doorstep of the High Country, Victoria's premier cycling destination.

The region is home to the Great Victorian Rail Trail, which offers cycling, horse-riding and walking opportunities and stretches from Mansfield to Tallarook encompassing the townships of Alexandra and Yarck within the Lake Eildon/Alexandra sub region.

Road cycling is also popular across the Shire, with established routes including climbs in Lake Mountain and Kinglake, Skyline, and a loop circuit connecting Mount Donna Buang to Lake Mountain.

A number of mountain biking trails and parks are also located across the Shire including:

- Buxton Mountain Bike Parks in Buxton and Lake Mountain;
- Lake mountain - Marysville Flow Trail;
- Narbethong Downhill Trail; and
- Kinglake - Bowden Spur Downhill Trail.

There is also an unofficial mountain bike course in Lake Eildon.

The natural assets of the region support a range of popular visitor attractions which draw varying levels of visitation across the year, however there is further

opportunity to better develop and promote the region's nature based outdoor recreation options such as walking tracks and camping.

4.4. GOLF

Golf is also an emerging product strength in Murrindindi, with the recently completed and Greg Norman designed high end private course Cathedral Lodge ranked within the top 100 golf courses in the world¹ and set to a backdrop of the Cathedral Ranges.

The region is also home to a number of other golf courses and clubs, including Yea Golf Club, Alexandra Golf Club, Marysville Golf Club and Eildon Golf Club.

4.5. FOOD AND AGRIBUSINESS

Food and agri-business is an emerging strength in Murrindindi, including emerging destination food offerings, wineries within the Upper Goulburn Wine Region and farm gate experiences supported by a diversity of local producers.

4.5.1. FARM GATE AND LOCAL PRODUCERS

Current local produce businesses and agritourism experiences across the Shire² (ranging from wholesale to direct to the public/farmgate) include:

- **Kinglake and Surrounds:** Bumpstead Family Apiaries in Kinglake;
- **Yea and Surrounds:** Murrindindi Olive Grove in Yea; Tom's Paddock and Wildcrust Bakery in Glenburn;
- **Lake Eildon/Alexandra:** Ashton Lodge Country Preserves in Eildon; Ross Park Angus in Fawcett, Paradox Olive Grove in Kanumbra, Koala Cherries & CherriShed in Yarck; Bilyara Springs Olives in Merton; Taggart's Pork in Taggerty; and

¹ Source: <https://www.top100golfcourses.com/golf-course/cathedral-lodge>

² Source: Murrindindi Food and Wine Inc, <http://www.murrindindifoodandwine.org.au>

- **Marysville/Lake Mountain:** Great Divide Coffee in Marysville; Black Range Garlic and Buxton Trout Farm in Buxton.

There are also a number of small scale markets held in the shire showcasing local Goulburn Valley produce, however these events predominantly attract the local community only, and need further development to achieve a greater reach.

4.5.2. RESTAURANTS/FINE FOOD

Destination restaurants or cafes that showcase regional produce and/or offer high quality dining experiences are currently limited across the region. Current key existing offerings include:

- **Grant Street Grocer** in Alexandra which opens daily for breakfast and lunch (as well as opening as a restaurant on Friday and Saturday nights) and also offers a produce store heroing local produce, take home meal options, and one off events;
- **The Black Spur Inn** in Narbethong which offers a restaurant open for breakfast, lunch and dinner featuring regional produce and wines, as well as offering accommodation and functions; and
- **Yea Peppercorn Hotel** which offers a popular restaurant, lounge bar, accommodation and events.
- **The Alexandra Hotel** which changed ownership in 2017 and now offers seasonal menus supporting local producers for lunch and dinner, and accommodation.
- **Flowerdale Estate** which offers Gracies Restaurant focused around local produce, Sunday high tea, and accommodation, as well as events and conference facilities.

Other local establishments include:

- **Yea and Surrounds:** Marmalades Restaurant, Café & Produce Store, Yea Peppercorn Hotel, Rendezvous in Yea, Yea Country Club Hotel, Yea Chinese Restaurant, Mint and Jam, and The Provender Country Bakehouse

- **Lake Eildon/Alexandra:** The Alexandra Hotel & Café, The Corner Hotel, Mt Pleasant Hotel, The Shamrock Hotel, and Rubicon Hotel in Alexandra, Rennies at Acheron, and Aqua Bar & Café at Lake Eildon, and Giddy Goat Café and Bucks Country Bakehouse in Yarck; and
- **Marysville/Lake Mountain:** Elevation 423 Bar & Café, Vibe Hotel Radius Bar and Grill, Fraga's Café Restaurant, The Duck Inn, Marysville Country Bakery Café; Igloo Roadhouse and Bucky Bistro at Buxton Hotel in Buxton.

4.5.3. WINERIES, BREWERIES AND DISTILLERIES

Murrindindi Shire is located within the Upper Goulburn Wine Region, one of six wine regions located across the wider High Country region, producing cool climate wines such as Sauvignon Blanc, Chardonnay and Merlot

Key wineries within the Shire include Black Range Estate, Slattery Vineyard, Penbro Estate, YarraDindi Vineyard (formerly known as Yea Valley Vineyard), Little River Wines, Phillip Lobley Wines, Girdwood Estate, and Santarossa Vineyards and Sedona Estate Winery & Cellar Door.

Sedona Estate Winery & Cellar Door is the only fully operational winery and cellar door in the shire. Many wineries towards the eastern side of the shire, such as Snobs Creek Estate Wines and Mount Cathedral Vineyards, are only open by appointment or only open to the public on select peak weekends throughout the year.

There is also Giverny Estate in Toolangi which produces organic kiwi fruit wines and cider. Strath Creek Brewery is also in the process of being redeveloped but requires funding to complete ongoing renovations.

4.6. HERITAGE, ARTS AND CULTURE

Heritage, arts and culture is an emerging product strength in the Shire, but contemporary motivating product is currently limited.

There a number of existing community and small scale museums and historical societies across the Shire, of which the Alexandra Timber Tramway and Museum

has the potential to be a significant visitor drawcard with further contemporary interpretation.

A number of iconic pubs and hotels also exist throughout the Shire, many of which have been rebuilt to reflect their former character (e.g. the Black Spur Inn in Narbethong which is now a popular food destination), with further opportunities for contemporary redevelopment and interpretation across the Shire.

The Rubicon Valley Historic Area, located just south-west of Eildon township, is Taungurung land. The Taungurung people continue to have a strong connection with the area through Camp Jungai, which is a basecamp operated by the Outdoor Education Group. There is significant opportunity to promote the indigenous and European heritage of the area through nature-based activities. The Rubicon State Forest also has a long history of timber production.

Great Victorian Rail Trail is the longest rail trail in Victoria and the longest continuous trail in Australia. It is an iconic trail, passing through Mitchell, Murrindindi and Mansfield shires and a number of natural assets such as the Goulburn River. Furthermore, the Great Victorian Rail Trail passes through iconic heritage attractions including the Cheviot Tunnel and Kerrisdale Mountain Railway & Museum. The Great Victorian Rail Trail needs to be promoted by Murrindindi Shire, as it is a key asset for the shire and growing awareness of the ride will increase visitation to the shire, as well as the development of further complementary tourism product

There is an emerging arts and cultural community, particularly around Marysville township, with existing assets including the MiRA (Marysville Information and Regional Artspace) Bruno Sculpture Gardens, and Little Fishes Art Studio which showcases local artists work. Darren Gilbert Art Studio in the Highlands is a new art attraction and The Highlands Studio Gallery are also located in Yea.

³ There are currently safety upgrades underway on the Goulburn Valley Highway from Yea-Molesworth-Cathkin, and north along the Hume Highway towards Wangaratta.

Additionally, there are a number of arts and cultural events held within the Shire, including popular music events such as the Foggy Mountain Music Bluegrass Festival and Marysville Jazz and Blues Festival.

4.7. INFRASTRUCTURE & CONNECTIVITY

Murrindindi Shire is serviced by the Goulburn Valley³, Melba and Maroondah Highways, all of which pass through the shire. They provide links to the Tullamarine Airport (approx. 1.5-hour drive) and the Hume Highway. The Hume Highway is the principal road link to Melbourne between Melbourne and Victoria's North East region.

Murrindindi is not serviced by any railway lines, with the closest railway stations being Seymour station to the northwest (approx. 55 mins drive) and Lilydale Station to the south (approx. 55 mins drive).

Although Murrindindi is in close proximity to Melbourne, almost all access roads to the Shire are windy forest roads, which is a deterrent to some visitor groups.

4.8. ACCOMMODATION

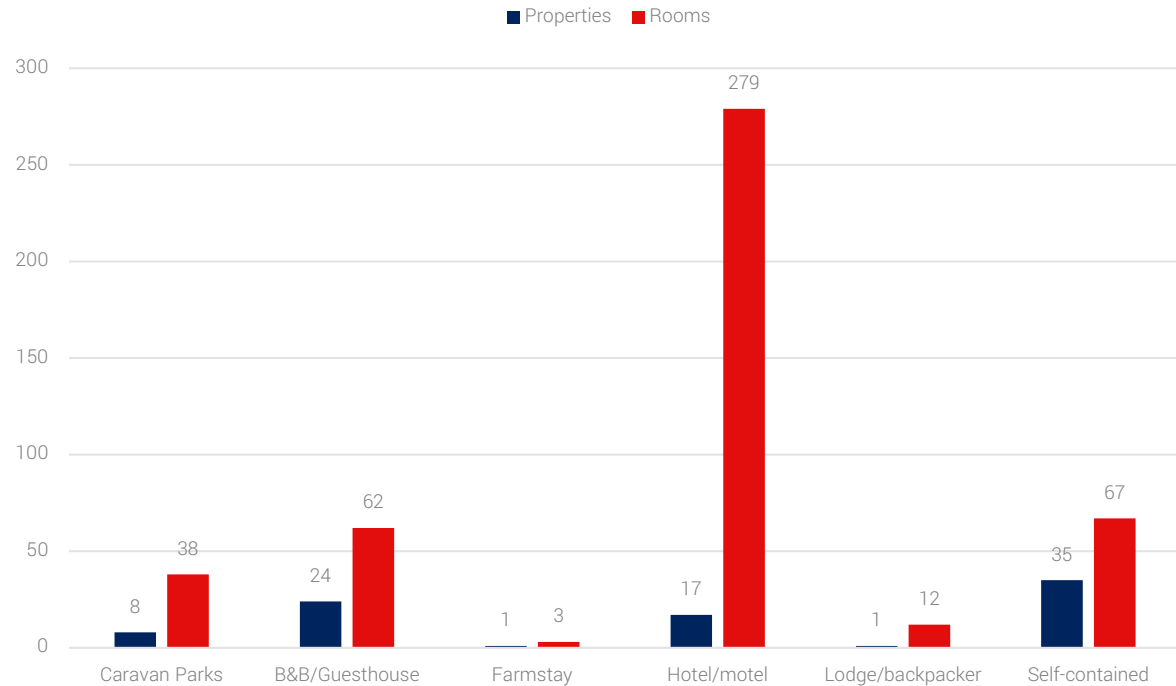
4.8.1. ACCOMMODATION OVERVIEW

A total of 86 properties were identified across Murrindindi Shire, providing a total of 461 rooms (F21).

A further 440 sites were also available across the 8 caravan parks identified, including both powered and unpowered options.

The majority of properties (35) were self-contained properties, whilst Hotel/Motels provided the largest room capacity, with a total of 279 rooms across 17 establishments.

F21. TOTAL ACCOMMODATION MURRINDINDI SHIRE BY TYPE, NO. OF PROPERTIES VS. NO. ROOMS

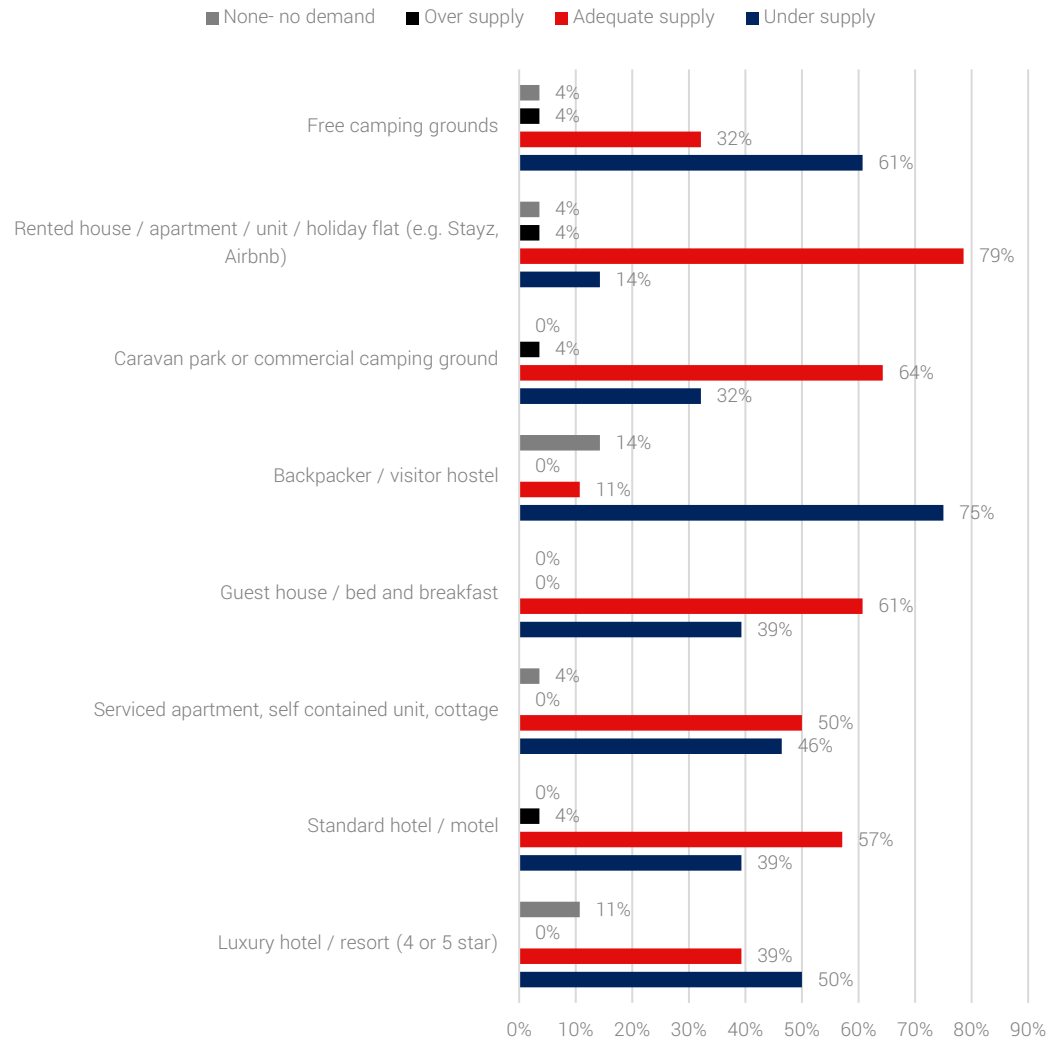


Source: Urban Enterprise, 2018.

ACCOMMODATION SUPPLY

An industry survey conducted identified that 61% of survey respondents believe there is an oversupply in Bed & Breakfast/Guesthouse type accommodation, whilst 75% of respondents believe there is an undersupply of backpacker/visitor hostels. These ideas are reflected in Figure 26 below, which shows the results of the accommodation audit.

F22. INDUSTRY SURVEY ACCOMMODATION SUPPLY PERCEPTION



AIRBNB

129 AirBnB entire home rentals are recorded by AirDNA throughout Murrindindi Shire. The average daily rate for Murrindindi Shire is \$244 with a low occupancy rate of only 41%.

The majority of entire home rentals recorded were in Marysville (18), Eildon (22), Yea (10), Kinglake (9) and Taylor Bay (14). A further 25 private room rentals were recorded by AirDNA, which were scattered around the Shire. Kinglake hosted 36% of private room rentals in the Shire (9 rooms).

The average daily rates for Alexandra (\$105) and Yea (\$152) were significantly lower than locations like Kinglake (\$288), Marysville (\$313), Eildon (\$320) and Taylor Bay (\$415). The higher average daily rate for these locations could be due to the greater number of tourism attractions and natural assets, combined with a greater number of large family holiday rental properties.

T5. AIRDNA SUMMARY, MURRINDINDI SHIRE

	Entire house	Private rooms	Average daily rate	Occupancy rate
Murrindindi	129	25	\$244	41%

Source: AirDNA, 2018.

Due to the dispersed nature of settlements in the shire, as well as the lower annual overnight visitation numbers received, it will be difficult to attract large-scale accommodation providers in the region. The Shire should focus on Airbnb promotion and Council should support Airbnb development through promotion and business support.

There is precedent to attract a property manager to set up in the area and manage a range of Airbnb properties on behalf of the owners, such as Daylesford Escapes or Dinner Plain Accommodation.

4.9. SUB-REGIONAL PRODUCT PROFILES

4.9.1. KINGLAKE RANGES

Characterised by its proximity to Melbourne, the Kinglake Ranges sub-region can be accessed via a number of roads exiting Melbourne including the Yea Whittlesea Road, Melba Highway, Healesville Kinglake Road and Heidelberg Kinglake Road with most routes taking just over an hour. The journey for each varies, but the common theme is rising above the Melbourne plain into a lush forested environment and is a signature experience of the region.

The trip from Melbourne via however the road infrastructure is mainly single lane and built up. The Kinglake Ranges environment is vastly different from the plains of Melbourne,

The sub region has key strengths in nature based; outdoor adventure, sport and recreation; and food and agribusiness, with key products and experiences including Kinglake National Park, equine, cycling and farmgates.

The major attraction in this sub region is the Kinglake National Park, an important Nature Based Tourism product for the wider GRV region, located within close proximity to Metropolitan Melbourne.

Leveraging from the Kinglake National Park, the Kinglake region comprises a range of outdoor adventure, sport and recreation attractions, with the region popular for both road cyclists and horse-riding.

Kinglake is an area of high-quality soils and high rainfall which supports a range of food producers and farm gate operations throughout the area.

Kinglake Ranges has only self-contained properties; with 5 properties located in the sub region, offering a total 16 rooms.

KEY GAPS AND OPPORTUNITIES

In order to drive further visitation product development that leverages from the natural environment and high-quality agricultural soils should be explored.

Emerging strengths for the Kinglake Ranges include the wider food and agribusiness sector, arts and culture, and golf

There is significant potential for the development of a nature based catalyst product or adventure activity in the Kinglake Ranges/Toolangi, such as a zip line or other major adventure based product.

Other key opportunities for this sub region include:

- **Farm-gate attractions and farm-gate businesses across the Kinglake Ranges to attract day trip / passing visitation from Melbourne;**
- **Farm stay and B&B accommodation to link with the local produce offer and to cater for weekend short-break visitors from the Melbourne market;**
- **Destination food and beverage experiences (distillery, brewery);**
- **Development of self-contained accommodation;**
- **Improve family friendly activities;**
- **Further development and enhancement of cycling routes and infrastructure; and**
- **Development of Wallaby Creek as a spring water destination.**

4.9.2. YEA AND SURROUNDS

Yea is the main township in this subregion, and is a popular stopover on the way to the High Country, lakes and rivers and is set in a valley surrounded by steep hillsides. Nature based and food and agribusiness are the primary strengths of the sub region, with an emerging strength in heritage, arts and culture.

There are a range of existing natural assets located within the region, including the Yea River wetlands, and associated newly developed visitor experience centre Y Discovery Centre which has significant potential to draw visitors and provide a high quality visitor information experience for the wider Shire.

Yea and surrounds, whilst being a popular food stopover, has limited contemporary cafes and food venues, with one exception being Yea Peppercorn Hotel. The only fully operational winery and cellar door within the area including Sedona Estate, however most wineries are currently under developed from a tourism perspective, open only by appointment and with limited complimentary food offerings.

Yea also has a self-guided heritage walk experience for visitors which outlines the town's heritage links and includes several National Trust buildings, as well as the Hume & Hovel Cricket Ground, and two art galleries (Gallery 34, The Highlands Studio Gallery).

Overall, Yea and surrounds had a total of 15 identified accommodation establishments, offering a total of 93 rooms and 29 sites (Table T6).

T6. YEA AND SURROUNDS ACCOMMODATION OVERVIEW

Accommodation Type	Properties	Rooms	Sites
Caravan Parks	1	8	29
B&B/Guesthouse	6	41	
Hotel/motel	4	32	
Self-contained	4	12	
Total	15	93	29

Source: Urban Enterprise, 2018.

PRODUCT GAPS AND OPPORTUNITIES

The product audit has identified gaps and opportunities for the sub-region, based around the experience and product offer. These include:

- **A boutique retail operator in Yea, such as an arts / crafts / local produce store, could capture passing snowfields visitation and diversify the township offer;**
- **High quality self-contained accommodation in Yea;**
- **Contemporary dining options in Yea to support the night time dining offer;**
- **Backpacker/group accommodation to capture the itinerant worker visitation in Murrindindi Shire;**
- **Providing product and infrastructure to capitalise on Yea's location as a key destination on the Great Victorian Rail Trail;**
- **Development of a tourist park on the Goulburn River;**
- **Further development of food and beverage experience; and**
- **Wellness centre leveraging from mineral spring assets near Yea.**

4.9.3. LAKE EILDON/ALEXANDRA

Featuring two strong visitor nodes, the Alexandra/ Eildon sub-region is characterised by its proximity to the High Country, with Eildon township located on the southern shores of Lake Eildon at the Goulburn River, and accessed in just over 2 hours from Melbourne via Alexandra. Alexandra, the administrative and retail hub of the Shire, is located on the Maroondah Highway and can be accessed from Melbourne via Yea or via the Black Spur.

The region has a strong nature-based tourism product, leveraging from Lake Eildon as its premier regional asset, with other significant assets and attractions including the Lake Eildon National Park, the Great Victorian Rail Trail, Cathedral Range State Park, Murrindindi Scenic Reserve and the currently underutilised Mount Torbreck.

Trout fishing is a key recreational experience in the sub-region, with the Goulburn River and Eildon Pondage described as two of the best locations in Victoria to go trout fishing.

Food and agribusiness, heritage, arts and culture, and golf also present significant opportunities for growth and are emerging strengths of the sub region, led by:

- Existing wineries, and the Alexandra Hotel and Grant St Grocer in Alexandra showcasing a range of local produce;
- The Timber Tramway and Museum and opportunities to experience historic architecture, such as the National Trust-classified post office, national bank and law courts in Alexandra; and
- High end private golf facility Cathedral Lodge near Alexandra.

A total of 27 accommodation establishments are located within the sub region, offering a total of 220 rooms and 263 camping sites, with the majority of rooms (152) within hotel/motel establishments.

T7. LAKE EILDON/ALEXANDRA ACCOMMODATION OVERVIEW

Accommodation Type	Properties	Rooms	Sites
Caravan Parks	6	38	263
B&B/Guesthouse	5	10	
Farmstay	1	3	
Hotel/motel	8	152	
Self-contained	7	17	
Total	27	220	263

Source: Urban Enterprise, 2018.

PRODUCT GAPS AND OPPORTUNITIES

Improvement of Lake Eildon waterfront amenities and services and the accessibility of infrastructure and commercial operations on Lake Eildon is a significant opportunity for the region. This should include:

- **Establishment of a restaurant or café on the Lake Eildon waterfront;**
- **Providing or improving access to swimming and boat ramps;**
- **Offering hire services for water based activities such as kayaks and canoes (potential for nature-based tourism hub at Alexandra VIC);**
- **Mount Torbreck also presents significant opportunity for snow play with access improvements;**
- **Enhancement of Rubicon Valley Historic Area;**
- **Formalisation of mountain bike tracks and promotion as a road-based and gravel cycling destination;**
- **Eildon pondage commercial enhancement; and**
- **Lake Eildon resort accommodation.**

4.10. MARYSVILLE/LAKE MOUNTAIN

4.10.1. PRODUCT PROFILE

Marysville is a well-established tourism destination at the foot of Lake Mountain, previously well-known for its picturesque setting and quaint cottage type architecture. Following the bushfires, the township has been rebuilt and is now emerging as a hub for a contemporary experience set in nature.

The key product in Marysville is centred around nature-based experiences, including iconic walks and waterfalls such as Michaeldene Track, Lady Talbot Trails and Steavenson Falls. Natural assets include the Yarra Ranges National Park, Marysville State Forest, Lake Mountain, Steavenson Falls, The Beeches Rainforest, Keppel Falls, Murrindindi Scenic Reserve, Gallipoli Park, and The Big Tree.

Walking and cycling are a key tourism offering in Marysville and Lake Mountain. Marysville provides access to the Marysville Trails; which constitute 14 trails in and around Marysville that take in numerous natural features and iconic waterfalls, such as Steavenson Falls. Key cycling trails include Buxton Mountain Bike Parks in Buxton and Lake Mountain, Marysville Flow Trail and Narbethong Downhill Trail. This region is also a popular fishing destination.

Marysville has key experiences relating to its proximity to Lake Mountain alpine resort, including skiing, tobogganing and other snow-based activities. In the green season, Lake Mountain is also a popular destination for mountain biking. Lake Mountain also hosts one leg of the 7 Peaks Ascent Challenge, which is a 22km ride from Marysville to the top of Lake Mountain.

The region is also emerging as an arts and cultural destination. The Little Fishes Art Studio showcase, Bruno's Art and Sculpture Gallery, and the recently opened MiRA (Marysville information and regional Artspace) provide a setting for visitors to experience local artwork.

Food and agri-business offer is also an emerging strength, with key products including Great Divide Coffee in Marysville; Black Range Garlic and Buxton Trout Farm in Buxton.

There are 34 properties, 247 rooms and 148 powered and unpowered camping sites in the region. Accommodation types are dominated by self-contained and B&B guesthouse

T8. MARYSVILLE/LAKE MOUNTAIN ACCOMMODATION OVERVIEW

Accommodation Type	Properties	Rooms	Sites
Caravan Parks	2		148
B&B/Guesthouse	13	46	
Hotel/motel	5	149	
Lodge/backpacker	1	12	
Self-contained	13	40	
Total	34	247	

PRODUCT GAPS AND OPPORTUNITIES

Although Marysville/Lake Mountain is predominately a nature-based destination with a number of significant natural assets and associated activities, these need further development and promotion to develop into iconic attractions for the region.

Emerging strengths for Marysville include arts and culture and the wider food and agribusiness sector. These should be developed alongside nature-based activities to provide a contemporary complementary experience.

There is significant opportunity for the region to develop as a wellness destination, leveraging from the natural environment. Opportunities for product development include:

- **Eco-lodge accommodation at Lake Mountain to diversify the product offer and attract year round visitation;**

- **Farm stay and retreat style B&B accommodation to link with the development of wellness product;**
- **Expansion of local produce offers such as farm gate attractions;**
- **Festivals and events centred around holistic health and wellness;**
- **Improvement of food and beverage offer in Marysville; and**
- **Promotion and enhancement of the sub-region as a cycle tourism destination.**

4.11. STRATEGIC PRODUCT CONSIDERATIONS

4.11.1. NATURE-BASED CONSIDERATIONS

PRODUCT GAPS AND BARRIERS

- **Visitor Yield.** A vast majority of visitors to Murrindindi are coming to experience nature, be it walking, cycling, fishing, hunting or boating. Much of this activity is low yield and does not encourage expenditure. Growing overnight visitation is essential to extending yield in the region, as well as the development of complementary tourism products.
- **Nature based infrastructure and assets.** The assets and infrastructure in parks and reserves require improvement to meet visitor need. This includes improvements to tracks and trails, visitor signage, interpretation and water access.
- **Lack of touring and hiring services.** Murrindindi has a number of significant nature-based tourism destinations which lack the recreational facilities (e.g. canoe hire, fishing classes, tours) to support increased visitation and expenditure within the shire. The locations, such as Lake Eildon, the Goulburn River, Kinglake and Lake Mountain,
- **Promotion of walking and cycling routes.** Murrindindi has a number of walking and cycling touring routes, however they are inadequately promoted and require further activation with complementary tourism product along the routes.

OPPORTUNITIES

- **Hidden gem- Mount Torbreck.** Mount Torbreck is located only 43 kilometres from Alexandra and 19 kilometres to Eildon. It is more than 100 metres higher in altitude than Lake Mountain and presents an opportunity for snow play during the winter months and walking and cycling during the summer months.

- **Promote and develop NBT Icons.** Need to provide a focus on product development, activation and experience on iconic product. This includes:
 - Kinglake National Park;
 - Lake Mountain;
 - Lake Eildon;
 - Rubicon;
 - Goulburn River and Tributaries;
 - Great Victorian Rail Trail. Mansfield -Tallarook Rail Trail
 - Tallarook State Forest
- **Great Forest National Park.** There is long-term opportunity to establish a new National Park in forestry reserve areas, following closure of logging activities post 2030, in line with State Government legislation.
- **Awareness/ promotion of wildlife.** Murrindindi Shire has an abundance of wildlife, however this not promoted. There is opportunity to develop wildlife locations where visitors can come to see the abundance of wildlife on offer.
- **Promotion of touring loops and drives.** Murrindindi is excellently placed to promote touring loops and drives. This can be targeted to 4WDs driving back country, heritage car clubs and motorcycle touring. Definition of touring loops into Murrindindi should be promoted by the Shire.
- **Activation and marketing of Great Victorian Rail Trail.** The Great Victorian Rail Trail is underutilised and there are very few businesses that leverage from this. A specific activation plan for the rail trail should be considered. This needs to look at ways to market and package the rail trail with operators.
- **Cycle tourism.** Murrindindi is developing a reputation as a cycling destination. This includes a mix of product for all cycling typologies including recreational riding, mountain biking and road cycling. Further enhancement of promotion of cycle tourism should be a focus for the strategy with consideration of:
 - Great Victorian Rail Trail;

- Mountain biking at Lake Mountain/Marysville/Buxton and Eildon, Narbethong and Kinglake;
- Gravel riding through the mountainous terrain around the Cathedrals, Rubicon and Eildon areas; and
- Road cycling around Kinglake, Eildon/Skyline, Ruffy and the Strathbogies and Marysville/Lake Mountain.

- **Green season at Lake Mountain.** There is a need to continue to develop green season development at Lake Mountain. This will support visitation to Marysville.
- **Nature based tour and hire hub.** Opportunity to establish a nature based hub in Alexandra to support nature based tourism across the region. This will support a vast range of activities that are available in proximity to Alexandra and strengthens Alexandra as a hub for outdoor recreation.
- **Strengthen the Alexandra VIC.** Marysville VIC is associated with arts, Yea VIC is associated with the Wetlands. There is opportunity for Alexandra VIC to be developed as a Nature Based Hub with hire and tours. This provides a complimentary offer for the VIC and strengthen its visitation and attraction.
- **Branding as a fly-fishing destination.** Murrindindi is one of the best fly-fishing destinations in Australia. With most of the streams less than 1.5 hours from Melbourne, there is great opportunity to grow fly fishing in the region.
- **Promotion and enhancement of the sub-region as a cycle tourism destination.**

4.11.2. HERITAGE, ARTS AND CULTURE

OPPORTUNITIES

- **Promote local Indigenous and native Australian plants.**
- **Enhancement of Rubicon Valley Historic Area.**
- **Festivals and events centred around holistic health and wellness.**

4.11.3. FOOD AND AGRI-BUSINESS

PRODUCT GAPS AND BARRIERS

High quality food and wine dining experiences. Murrindindi Shire lacks the high-quality, modern dining experiences desired by emerging high-flyer visitor markets, including golfing visitors and houseboat visitors.

- **Labour.** There is difficulty experienced by many businesses in attracting and retaining labour. Specific issues include:
 - Low resident population;
 - Lack of permanent or long-term rental accommodation;
 - Difficulty sourcing labour in hospitality including chefs; and
 - Labour needs are seasonal.

OPPORTUNITIES

- **Servicing of remote visitors.** There are many visitors to Murrindindi Shire who are staying in locations where there is limited access to food, beverage and shopping. This includes visitors camping in the various parks and reserves and those on houseboats in Lake Eildon. There is opportunity for private businesses to service these markets by bringing food and groceries to them. An opportunity should be explored for an operator service this market.
- **High quality food and wine dining experiences.** Murrindindi Shire has the opportunity to develop high-quality, modern dining experiences, which will increase visitor expenditure in the region and provide incentive for high-flyer markets to extend their trip to stay overnight
- **Expansion of local produce offers such as farm gate attractions.**
- **Improvement of food and Beverage offer in Marysville.**

4.11.4. ACCOMMODATION

OPPORTUNITIES

- Self-contained accommodation/B&B and/or group accommodation units catering for the Nature Based Tourism experience.
- Luxury accommodation for lifestyle leader market, including the emerging golf market
- Investment in nature-based accommodation and glamping
- High quality resort style accommodation in Eildon to improve and diversity the offer.
- Farm stay and retreat style B&B accommodation to link with the development of wellness product;
- Eco-lodge accommodation at Lake Mountain to diversify the product offer and attract year round visitation;
- Lake Eildon resort accommodation.
- Farm stay and B&B accommodation to link with the local produce offer in Marysville and to cater for weekend short-break visitors from the Melbourne market.
- Development of self-contained accommodation in Kinglake.
- High quality self-contained accommodation in Yea.
- Development of a tourist park on the Goulburn River.

5. EVENTS PROFILE

5.1. INTRODUCTION

The events profile has drawn on an audit compiling existing data collected by Murrindindi Shire and supported by desktop research. This includes an analysis of the number of events per sub-region; event attendance; event type; event seasonality; and management and funding.

A summary of key tourism events within Murrindindi are provided below. Only larger-scale tourism events have been included in this analysis, as they have the ability to attract the greatest visitor numbers, increase visitor expenditure and raise the shire's tourism profile.

Although not included in this analysis, it is important to note that there are a number of other small-scale community events in the region, totalling 43 events and receiving about 5,500 visitors annually.

5.1.1. EVENT TYPOLOGIES

Murrindindi Shire has a diverse portfolio of tourism events, which have been categorised into the following for analysis purposes:

- **Music and Arts** – including art exhibitions, theatrical productions, music festivals and concerts, and cultural festivals;
- **Family** – including events targeting families (such as the Yea Show);
- **Lifestyle** – including large scale festivals based on location (e.g Alexandra Truck, Ute and Rod Show);
- **Food & Wine** – including food festivals and wine shows;
- **Adventure and Outdoor Sports** – including various participatory sports, recreation activities, events and fundraisers; and
- **Sporting Expo/Show** – including various spectator sporting events and regionally significant horse racing events.

5.2. KEY FINDINGS

There were 27 tourism events in 2018, attracting approximately 39,000 visitors. Although not tourism events, it is important to note that there are several other small-scale community events in the region, totalling 43 events and receiving about 5,500 visitors annually.

The Alexandra Truck Ute & Rod Show is Murrindindi's signature event. It is a 2-day event held in June, which currently attracts over 12,000 visitors annually. It is generally agreed upon by local tourism businesses that accommodation demand outweighs supply in the Shire during busy event periods. Other important tourism events are Eildon Lions Market, Alexandra & District Open Gardens, Foggy Mountain Music Bluegrass Festival and Marysville Jazz and Blues Festival.

Flowerdale Estate, Holmesglen Eildon and Vibe Marysville are key event facilities that can be further promoted to increase visitation to the shire. There are several existing community buildings that have significant potential to be expanded to hold large-scale events, such as Kinglake Ranges Rebuilding Advisory Centre (RAC) and Marysville Stadium.

There are significant gaps in food and wine and adventure and outdoor sports events in Murrindindi. There are a number of events that can be expanded to increase overnight visitation and yield, as well as events with synergies that can be expanded further, including Marysville Jazz and Blues Weekend and Foggy Mountain Music Bluegrass Festival.

There is also opportunity to attract new events to the region that align to Murrindindi's product strengths. In order to support existing and future events, local tourism and hospitality businesses need to trade outside normal hours during a significant event/function/conference to provide a more attractive, contemporary visitor experience.

5.3. KEY EVENTS

The events within Murrindindi Shire that attracted the greatest visitor numbers in 2018 are:

- Alexandra Truck, Ute and Rod Show, which received approximately 12,000 visitors;
- Eildons Lions Easter Market, which received approximately 5,000 visitors;
- Lake Eildon Boating and Fishing Show, which received approximately 2,000 visitors;
- Giro Della Donna, which received approximately 2,000 visitors. (partly in the shire); and
- Foggy Mountain Music Bluegrass Festival, which received approximately 1,500 visitors.

Aside from the Alexandra Truck, Ute and Rod Show, there are no other signature events currently held within Murrindindi Shire.

Murrindindi is in a unique location where it is within equal proximity to Melbourne and also major rural cities of Shepparton, Wangaratta and Bendigo, with each of these locations approximately two hours from Murrindindi Shire. This provides access to a bigger visitor market than most regional council areas, which should be leveraged by Murrindindi in the attraction and development of 2-3 more signature events.

F23. ALEXANDRA TRUCK, UTE AND ROD SHOW



Source: Alexandra Truck, Ute and Rod show, 2018.

5.4. KEY EVENT FACILITIES

The following key event facilities have been identified through local industry consultation (workshop engagement and survey responses) and supported by desktop research. There are approximately 30 small-scale community event spaces, including shire halls, community centres and local club halls.

T9. NOTEWORTHY EVENT FACILITIES

Facility	Conference capacity (cocktail)	Total Capacity (incl. other function spaces e.g. wedding)	Combined Accommodation Facility	Number of rooms
Holmesglen Eildon	650	850	Hotel	50
Vibe Marysville	430	430	Hotel	101
Flowerdale Estate	210	410	B&B/cottages	32

F24. FLOWERDALE ESTATE



Source: Flowerdale Estate, 2018.

Potential outdoor event locations include Eildon Pondage, Lions Park Rotunda and Gallipoli Park Precinct.

A potential future event facility is the Kinglake Ranges Rebuilding Advisory Centre (RAC) Building. The RAC Building was originally used as an advisory centre for town reconstruction after the bushfires, however, is currently unused and has high quality facilities such as a community kitchen complex. This has been identified by Murrindindi Shire Council and members of Murrindindi tourism industry as a facility with considerable opportunity for hosting large-scale events, if repurposed.

Another significant indoor event venue is the Marysville Stadium, a multi-sport indoor sports stadium with facilities for Basketball, Netball, Volleyball and Badminton and many other sports. The Stadium is part of the Gallipoli Park Precinct; therefore, this facility provides significant opportunity for hosting both indoor and outdoor events.

Murrindindi Shire Council received a planning application in late 2018 for the development of 85 National Park Road, Pheasant Creek into a multipurpose centre. This proposal also includes a conference space, accommodation facilities, a restaurant and an artists' retreat.

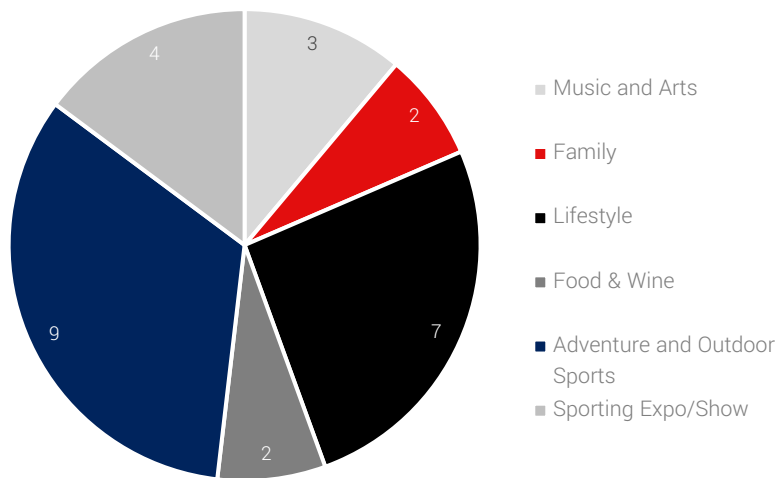
5.5. EVENT TYPES AND LOCATIONS

EVENTS BY TYPE

The main event types in Murrindindi Shire are Lifestyle events (e.g. Truck, Ute and Rod show and Alexandra Open Gardens), and Adventure and Outdoor Sports events (e.g. Marysville Marathon Festival).

There is a clear gap in food and wine events, and significant opportunity to further develop these events.

F25. NUMBER OF EVENTS BY TYPE



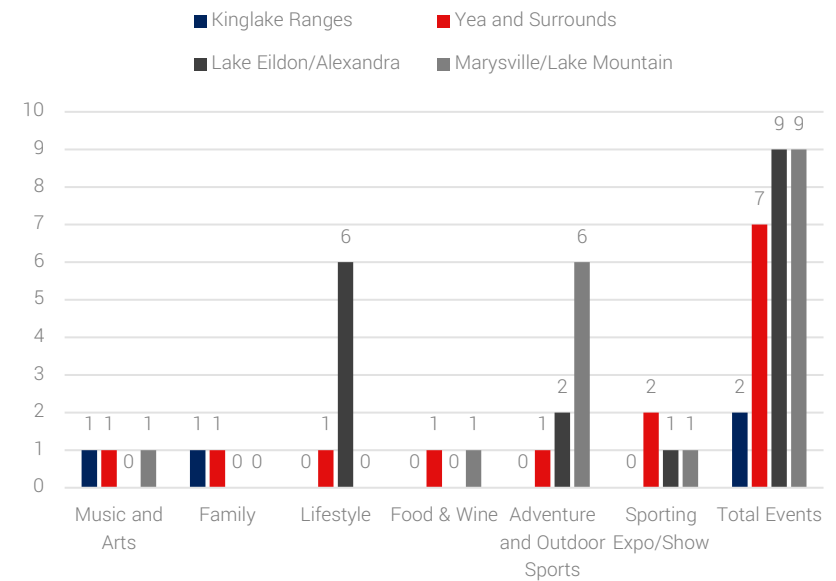
Source: Urban Enterprise, 2018.

EVENTS BY TYPE AND LOCATION

Lake Eildon/Alexandra and Marysville/Lake Mountain have the largest number of events with the shire. The main event types for Lake Eildon/Alexandra are lifestyle events whereas the main event types for Marysville/Lake Mountain are within the adventure and outdoor sport category. Key opportunities are in nature-based events, including cycling, mountain biking, and fishing, as well as in food, wine and agri-business events.

Due to the proximity of Kinglake Ranges to major metropolitan growth areas, there is significant opportunity to develop and attract more events to the region.

F26. NUMBER OF EVENTS BY TYPE AND LOCATION (2018)



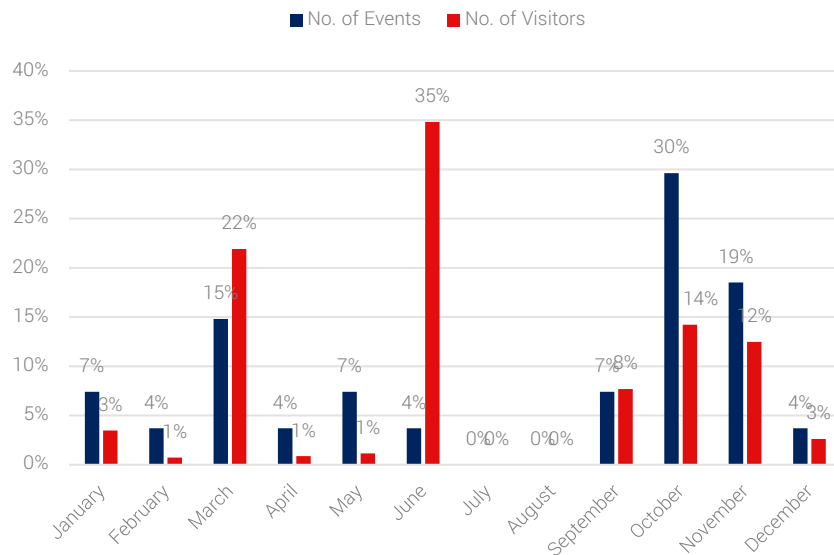
Source: Urban Enterprise, 2018.

5.6. EVENT VISITATION BY MONTH

F27 shows the proportion of events in comparison to the proportion of visitors. This highlights that within Murrindindi Shire, there are often a significant number of tourism events, without the necessary supporting visitation numbers.

Overall, there is significant potential to expand the events calendar, focusing on January, February, April, May July, August and December. There is particular opportunity to focus event development across the summer months of January February and December at Lake Eildon, which receives peak visitation over these months.

F27. PROPORTION OF EVENTS COMPARED TO VISITORS



Source: Urban Enterprise, 2018.

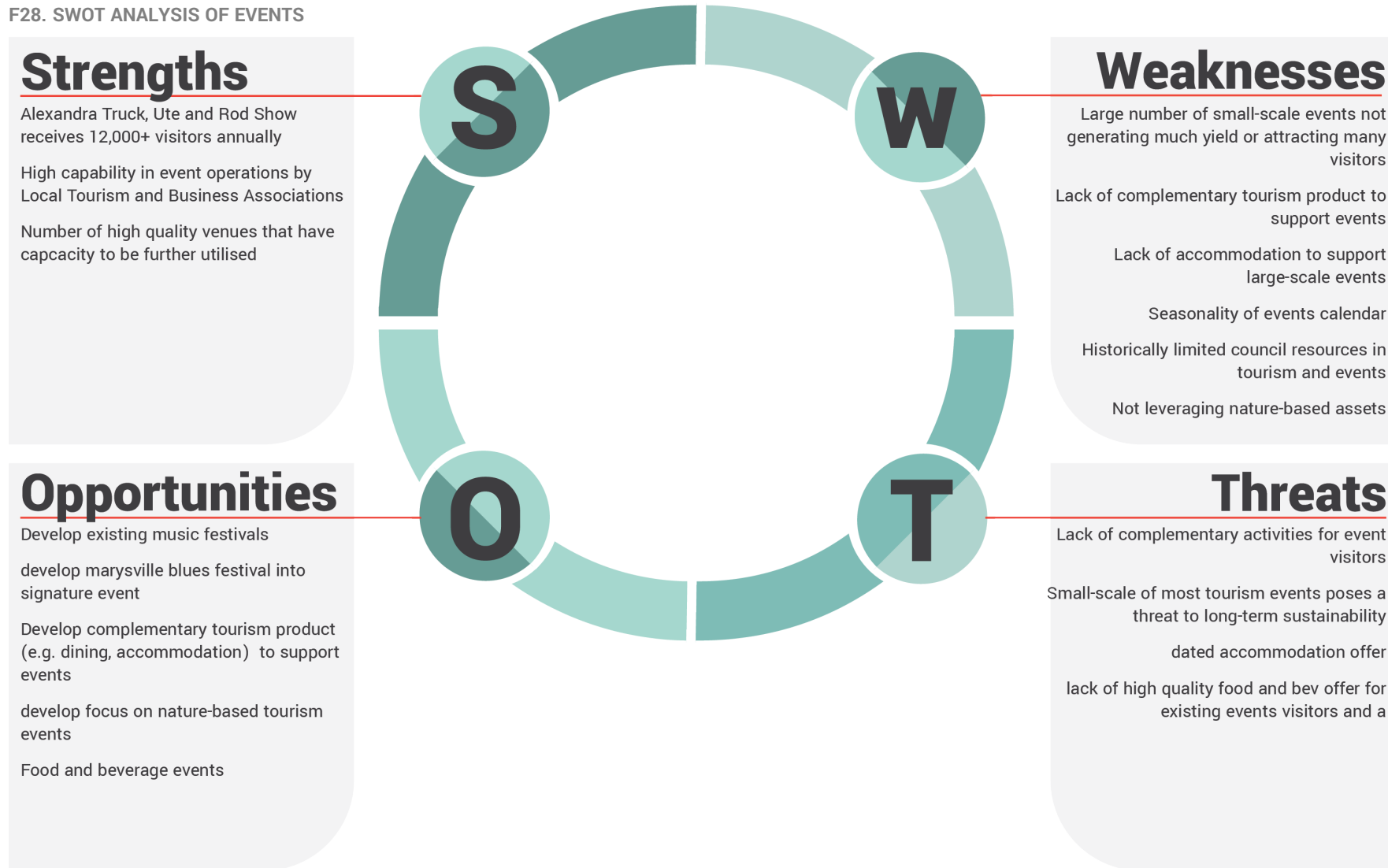
5.7. EVENT FUNDING

Event funding has been classified as self-funded (through private sponsorship, membership etc.), Council funded (i.e. Murrindindi Shire Council) and State Government funded. There are 26 self-funded events within Murrindindi Shire, as well as 2 State Government funded events and 1 Council funded event.

Foggy Mountain Music Bluegrass Festival is a partly state government funded and self-funded event. Marysville Jazz and Blues Weekend is partially self-funded, and received funding from Victorian State Government and Murrindindi Shire Council. Further State Government and/or Council funding would assist in the expansion and development of some of these smaller-scale events into more regionally and state significant events.

5.8. SWOT ANALYSIS OF EVENTS

F28. SWOT ANALYSIS OF EVENTS



5.9. STRATEGIC CONSIDERATIONS

GAPS IN EVENT TYPE

There are a number of identified gaps in the type of events currently held in Murrindindi Shire, including the following two major event gaps:

- **Food and wine events** – Food events in the Shire were limited to the Murrindindi Wine Weekend and the Australian Sparkling Wine Show in 2018. Additionally, even though Murrindindi Food and Wine Inc are quite active and there are a number of wineries in the region, the organisation currently only hosts one wine event;
- **Adventure and outdoor sport events** – Adventure and outdoor sport events which leverage from the high quality natural landscape of the region are a gap, with a lot of sports and recreation participation in the Shire (including large numbers of weekend cyclists) but limited formalised events. There is a significant gap in adventure and outdoor sports events in Lake Eildon, particularly events held in peak season at the Lake over summer.

EVENT PLANNING TO MAXIMISE YIELD AND ENCOURAGE LENGTH OF STAY

Events planning is critical for increasing the length of stay and yield for events. Event planners should consider the following, which may be reflected in future funding criteria:

- **Multi day events:** events that are multi-day have a much greater opportunity to encourage overnight visitation;
- **Local content:** drawing on local suppliers and food operators increases the flow on economic benefits of events; and
- **Linking with other events that have synergies:** there may be opportunity to link smaller events together to encourage visitors to visit more than one event during a trip, or events work with existing markets to create multi day visits.

There is significant event capability and capacity within Murrindindi, with Alexandra District and Traders Association having excellent event management skills that can be expanded across the region.

CONSOLIDATION OF EVENTS AND SYNERGIES IN EVENT TYPES

An important strategic focus for Murrindindi should be the consolidation of some smaller events, and concentration of resources to support the further expansion of some larger events.

There are a number of events in the Shire that have identified synergies that present opportunities to expand and grow the events sector through collaboration. These include:

- **Open Garden Weekends.** There are two mid-scale open garden events which could be expanded to include a month-long program of events celebrating gardens and nature in the Shire. These are the Alexandra & District Open Gardens and the Yea & District Open Gardens. There is opportunity to develop a larger scale 'Murrindindi Open Gardens Month' type event.
- **Jazz and Blues Music Festivals.** There is opportunity to create a 'Blues Music Month' in October, with the Marysville Jazz and Blues Weekend and the Foggy Mountain Bluegrass Festival occurring on consecutive weekends in October. Survey results of key Murrindindi industry members show a common vision for the Marysville Jazz and Blues Weekend and the Foggy Mountain Bluegrass Festival becoming signature events for Murrindindi Shire, along with Marysville Marathon.
 - The promotion of the 'Blues Music Month' could be accompanied by a range of food, wine and music centred events in the Marysville and Kinglake townships, with night-market type events and street busking.

LOCAL BUSINESS SUPPORT

Local businesses are not providing the necessary support to facilitate the growth of events. If local hospitality businesses opened their doors outside of normal hours during a significant event, this would help to elevate the visitor experience.

In turn, this would increase visitation to the shire through promotion of the event from people who enjoyed the event and the complementary tourism offerings within the town.

TARGET MARKETS AND ACCESS TO A RANGE OF MARKETS

Murrindindi is in a unique location where its within equal proximity to Melbourne and also major rural cities of Shepparton, Wangaratta and Bendigo, with each of these locations approximately two hours from Murrindindi Shire. This provides access to a bigger visitor market than most regional council areas.

Furthermore, events (and tourism) within the Shire have been identified as having issues attracting younger audiences, particularly those aged 25-30. Target market opportunities for events development include the large growth areas to the South which have a generally younger age profile.

POTENTIAL EVENT DEVELOPMENT

T10 shows that in the opinion of key tourism industry business owners, Outdoors and Nature-based, cycling, water sports and major events would provide the greatest benefit to tourism in Murrindindi Shire, if further developed.

T10. TOP 4 RESPONSES FOR EVENTS TO BE FURTHER DEVELOPED

Most beneficial event types to be further developed	% of responses
Outdoors and Nature-based (e.g. hiking, bird watching, fishing etc)	65%
Cycling (mountain biking, road cycling, rail trails etc)	63%
Water sports (water skiing, boating, kayaking etc)	55%
Major Events (e.g. festivals, conferencing, major sports events etc)	50%

Source: Urban Enterprise, 2018.

SUCCESSFUL REGIONAL EXAMPLES

The following regions and their respective events/event strengths have been identified as successful examples that could help guide events development in the Murrindindi Region.

CASTLEMAINE, BENDIGO, KYNETON, TRENTHAM AND DAYLESFORD

Castlemaine and Bendigo were identified as regions with arts and culture events that were well linked to food and other industries and generate whole of community involvement and participation, including:

- **Castlemaine Arts Festival** – a biannual festival incorporating Castlemaine’s artists open studios, and aligned weekend events and linked to Good Table (high-end dining);
- **Bendigo Australian Sheep and Wool show** – an event which was well connected to the existing hospitality institutes etc in the region.

Kyneton, Trentham and Daylesford were also identified as regions which have successfully leveraged events from their existing arts and/or nature and wellness strengths.

YARRA VALLEY

The Yarra Valley region was identified as having a similar visitor demographic to Murrindindi, attracting primarily daytrippers, however the development and success of tourism and events in this region is supported by the development of a ‘foodie’ experience in the form of high profile/high quality food and beverage businesses.

Potential exists to also develop this type of profile for Murrindindi through the development/expansion of existing businesses and their current offer (with options including Grant St Grocer or Sedona Estate), or the development of a new gastropub offer or similar.

Increased visitor numbers generated by food and beverage aligned events would increase the development feasibility of these type of businesses; with development of these supporting businesses also likely to increase the length of

stay and spend in the region from food event visitors (as well as other visitors to the region).

NEW EVENT IDEAS

There is opportunity for the establishment of the following potential new events with support from council:

- Lake Eildon Fishing event in off season;
- Attraction of multi-sport events and triathlons;
- Attraction of a mountain bike event in Marysville/Lake Mountain;
- Attraction of car club events in Yea and Alexandra;
- Hunting and Fishing and camping exhibition in Alexandra;
- Major food event in Marysville and Yea, focused on Goulburn Valley produce; and
- Major music event.

6. GOVERNANCE

6.1. INTRODUCTION

This section provides an assessment of tourism governance in Murrindindi Shire. It includes consideration of regional tourism structures, local tourism associations and resources with Murrindindi Shire dedicated to tourism and events.

This section provides an analysis of the current approach to tourism and draws on data and information provided by stakeholders. It also draws on consultation undertaken with stakeholders.

6.2. KEY FINDINGS

Murrindindi Shire has a fragmented approach to tourism governance when compared to most other Local Governments in regional Victoria. The fragmentation is present due to the existence of many local tourism and business associations across the key destinations within Murrindindi, as well as overlap in regional tourism structures. This fragmented approach means duplication of effort across a range of tourism administration, marketing, visitor services and digital content exists. This duplication of effort has resulted in mixed branding and messaging, inconsistent approach to digital media and visitor services, and poor use of limited resources available.

It is critical that tourism governance is simplified and streamlined to improve the quality and consistency of approach and to better leverage from regional tourism resources.

Murrindindi Shire was one of four Local Government members of Goulburn River Valley Tourism, however due to the dissolution of Goulburn River Valley Tourism, Murrindindi Shire is not aligned to any Regional Tourism Board.

Yarra Ranges Tourism and Tourism North East promote aspects of Murrindindi Shire as part of their Regional Tourism Boards. In the case of Yarra Ranges Tourism, Marysville and Kinglake Ranges are aligned to the Yarra Valley for marketing purposes and Tourism North East promotes the Great Victorian Rail Trail and Lake Eildon under the High Country umbrella.

The following key considerations should be made when identifying a regional tourism organisation to align with:

- **Value – What value can Murrindindi Shire leverage from the membership dollars: This includes consideration of available marketing opportunities, digital leadership and professionalism;**
- **Physical alignment – how well is the regional physically aligned? – are visitors likely to visit Murrindindi as well as other parts of the associated region – is there potential for visitor dispersal;**
- **Product alignment – How well is Murrindindi aligned in terms of product – does collaborative marketing make sense?**
- **Financial – Can Murrindindi afford the costs associated with membership.**

There are two options available at present in relation to regional alignment, Tourism North East and Yarra Ranges Tourism. The recommended approach for Murrindindi Shire in the short is to focus on its internal marketing and product development until the State Government Regional Tourism Review is complete and then decide the best fit Regional Tourism Board to align with.

Working with more than one Regional Tourism Board is likely to perpetuate the existing fragmentation of Murrindindi Shire’s tourism and promotional efforts, therefore it is recommended that Murrindindi Shire chooses to align with only one tourism board following the finalisation of the Regional Review.

6.3. OVERVIEW OF TOURISM ROLES AND RESPONSIBILITIES

The following table provides an outline of current tourism structures responsible for delivering tourism in relation to Murrindindi Shire.

This highlights that the current structure for tourism governance in Murrindindi is complicated due to the number of local and regional tourism organisations in this space.

T11. VISITOR ECONOMY ROLES AND RESPONSIBILITIES

Key Stakeholders	Market Research	Capital Investment In Tourism Product And Infrastructure	Funding	Marketing Intrastate	Marketing Interstate	Marketing Overseas	Physical Visitor Information Services/ Digital Presence	Digital Visitor Information Services	Tourism Product And Visitor Experience	Overview
National Level Organisation										
Tourism Australia	✓ ✓					✓ ✓		✓		This organisation does not normally deal directly with local government, however, is a valuable source for market research including NVS/IVS.
Trade and Investment Commission		✓	✓ ✓							This organisation is responsible for funding programs for public and private tourism infrastructure. It is important for Murrindindi Shire to track potential funding pools for projects.
State Level Organisation										
Regional Development Victoria		✓	✓ ✓							Continue to work with RDV to access potential funding opportunities. This strategy will be an important reference for strategic alignment with state government.
DELWP		✓							✓	DELWP manages a number of public forest reserves that include important nature-based tourism products.
Goulburn-Murray Water (GMW)		✓								GMW manages the water in Lake Eildon and the water above the high water line, and also owns and manages a number of infrastructure assets.
Parks Victoria	✓	✓						✓	✓ ✓	Parks Victoria manages a number of key state parks and reserves and a strong relationship is important for development and promotion of nature-based tourism.
Visit Victoria	✓		✓	✓	✓ ✓	✓ ✓		✓		Visit Victoria is a key partner in promotion and strategic planning for the tourism sector. Council should maintain a strong relationship to ensure alignment with Visit Victoria marketing initiatives.

Key Stakeholders	Market Research	Capital Investment In Tourism Product And Infrastructure	Funding	Marketing Intrastate	Marketing Interstate	Marketing Overseas	Physical Visitor Information Services/ Digital Presence	Digital Visitor Information Services	Tourism Product And Visitor Experience	Overview
Regional Level Organisation										
Yarra Ranges Tourism	✓			✓ ✓	✓ ✓	✓	✓ ✓	✓ ✓		Yarra Ranges Tourism is a State Government recognised and funded Regional Tourism Board. Geographically Marysville, Lake Mountain and Kinglake are included in their jurisdiction for marketing.
Tourism North East	✓			✓ ✓	✓ ✓	✓		✓ ✓		Tourism North East is a State Government recognised and funded Regional Tourism Board. Whilst it technically does not include Murrindindi localities alignment of some Murrindindi product with Tourism North East is strong. This includes Lake Eildon, Great Victorian Rail Trail and Alexandra. These areas are promoted through Victoria's High Country brand.
Local Level Organisation										
Murrindindi Shire	✓	✓	✓	✓	✓		✓		✓	Murrindindi Shire provides a range of tourism services including overseeing aspects of visitor information services, digital media and communication, emergency management, marketing, industry development and investment.
Murrindindi Inc										Murrindindi Inc. is the peak tourism body for the Shire, with a committee membership intended to provide a united voice for the Shire's tourism industry.
Marysville Triangle Business & Tourism Inc.				✓	✓		✓ ✓	✓ ✓	✓ ✓	Marysville Triangle Business & Tourism (MTBT) Inc. is the local business and tourism association for the Marysville Triangle region. It is a membership organisation representing business from Marysville and provides marketing and visitor information services.

Key Stakeholders	Market Research	Capital Investment In Tourism Product And Infrastructure	Funding	Marketing Intrastate	Marketing Interstate	Marketing Overseas	Physical Visitor Information Services/ Digital Presence	Digital Visitor Information Services	Tourism Product And Visitor Experience	Overview
Alexandra and District Tourism and Traders Association				✓			✓ ✓	✓		Alexandra Tourism and Traders is a membership based organisation which provides services to the local business community.
Alexandra Events Corporation Ltd.				✓				✓	✓	Non-profit organisation committed to hosting quality events across the Murrindindi Shire that promote the local region and benefit the local business and community. The driver of some of the regions key events, including Alexandra Truck, Ute and Rod Show, Eildon Big Fish Challenge and Alexandra Pro Rodeo.
Eildon Action							✓	✓		Eildon Action is a small organisation with limited capability. It is however responsible for operating the Eildon VIC.
Kinglake Ranges Business Network										This is primarily a business development and advocacy organisation with limited tourism function.
Lake Eildon Houseboat Association										Primarily an advocacy group.
Murrindindi Food & Wine Inc										Murrindindi Inc has a focus on business development and networking.

6.4. MURRINDINDI SHIRE TOURISM APPROACH AND RESOURCES

6.4.1. KEY FOCUS

Murrindindi Shire provides a range of tourism services including tourism events funding and support, industry networking, visitor information services

6.4.2. RESOURCES

Murrindindi Shire's tourism unit is combined with business/economic development. The table below provides an overview of the operational budget for business and tourism for 2019/20.

The tourism component of the budget is estimated to be around \$416,374. This includes budget for staff wages, events promotion and support, tourism Industry development, tourism marketing and visitor information services.

T13. BUSINESS AND TOURISM OPERATIONAL BUDGET 2019/20

Budget Area	Program	Expenditure	Items	Total
Staff Resourcing				
Staffing	Tourism and Business Development Staffing	Total Staff resources		\$469,790
Activities				
Tourism Support	Events Promotion and Support	Local / regional event promotion	\$8,000	\$8,000
	Tourism Industry Development	Regional tourism board contribution	\$40,000	\$40,000
	Tourism Marketing	Local / regional tourism marketing	\$32,790	\$32,790
	Visitor Information Services	Visitor services training, VIC support and VIC staffing		121,711
	Total Tourism Support Budget 2019/20			
Business Development	Economic Development Projects	Previously seed funding	\$18,000	\$18,000
	Investment / New Resident attraction	New resident & investment attraction	\$2,400	
		REMPAN	\$9,222	\$11,622
	Small Business Support	Business training	\$1,000	\$1,000
Total Business Development Budget 2019/20				\$184,424
MSC Grants and Contributions Program	Grants & Contributions Program	Business and Tourism Innovation (indicative amount, can move depending on total of applications)	\$130,000	
		Other grant streams	\$100,000	
	Total Grants Program Budget 2019/20			
Total Tourism, Business and Events Budget 2019/20				\$992,548.00

6.4.3. BENCHMARKING RESOURCES

Urban Enterprise, in conjunction with Economic Development Australia, undertook a benchmarking study of Local Economic Development resources across Australia. The figures following show the median number of economic development staff and median budget allocated to Local Government Tourism and Economic Development.

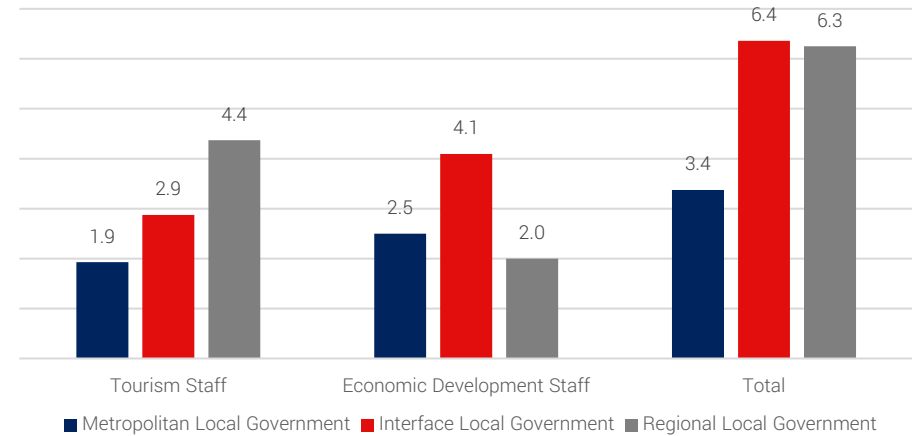
The data shows that when Murrindindi is compared with other regional Local Governments, it has lower levels of tourism and economic development staff - 3.2 FTE compared to 6.3 FTE which is the average for Regional Local Governments, however the operational budget is a similar level.

The large difference in staff resources dedicated to tourism and economic development compared to the median for regional councils is likely to be linked to the substantial business grants program of \$391,750.

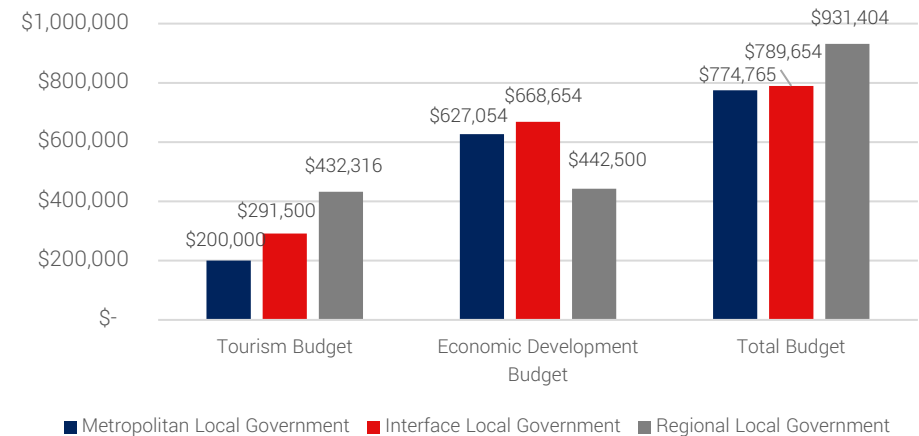
The business grants program for Murrindindi is far greater than other municipalities of a similar size.

The costs for operating Visitor Information Services is very low when benchmarked against other LGAs with similar level of on-ground VICs.

F29. MEDIAN STAFF RESOURCES FOR ECONOMIC DEVELOPMENT AND TOURISM IN LOCAL GOVERNMENT



F30. MEDIAN BUDGET FOR ECONOMIC DEVELOPMENT AND TOURISM IN LOCAL GOVERNMENT



6.5. LOCAL TOURISM AND BUSINESS ASSOCIATIONS

6.5.1. MURRINDINDI INC

Murrindindi Inc is a collaboration of Murrindindi Shire Business and Tourism Associations and Chambers of Commerce. Incorporated in February 2014, Murrindindi Inc is the coalition of Alexandra Traders and Tourism Association, Marysville Triangle Business and Tourism, Alexandra Events Corporation Ltd, Kinglake Ranges Business Network, Murrindindi Food and Wine and Y Water Discovery Centre.

Murrindindi Inc. exists to provide innovative, inclusive support to local business and tourism associations and to facilitate successful strategic planning and marketing, skills training and workforce development, delivery of local business resources and strong, sustainable economic growth for the businesses and communities of the Murrindindi Shire.

6.5.2. MARYSVILLE TRIANGLE BUSINESS AND TOURISM INC

OVERVIEW AND FOCUS

Marysville Triangle Business & Tourism (MTBT) Inc. is the local business and tourism association for the Marysville Triangle region. The association was formed in 2014 when an amalgamation took place between the Marysville & District Chamber of Commerce (MDCOC) and Mystic Mountains Tourism (MMT).

The purpose of the entity is to provide a united front to drive and support all businesses in the region, to have one voice, facilitating economic and strategic growth for the region while ensuring an exceptional experience for all visitors.

MTBT has 5 priority areas of focus:

- Governance and Strategic Planning;
- Business Planning and Finance;
- Visitor Services;
- Marketing; and
- Membership and Networking.

MEMBERSHIP

Three membership options exist:

- Community - \$30
- Affiliate - \$100
- Business - \$150
- Tourism Marketing Package - \$200

It is important to note that only members of Marysville Tourism Association are represented by the Visitor Information Centre. There are 74 members as part of Marysville Triangle Business and Tourism Inc.

6.5.3. ALEXANDRA TOURISM AND TRADERS

OVERVIEW

Alexandra Tourism and Traders is a membership based organisation which provides services to the local business community. The focus for the Alexandra Tourism and Traders is:

- Providing networking opportunities
- Providing support:
 - Receive business advice;
 - Social interaction;
 - Build strong friendships;
- Events:
 - Networking events;
 - Business expo's;
 - Social days/family days;
 - Information events;
- Promoting business & brand exposure:
 - Via ADTTA Website;
 - Via ATTA Newsletter (in the works);
 - Via ADTTA Social Media;
 - Face to face networking.

MEMBERSHIP

Membership for businesses is \$100 per business per annum, and is also \$100 per community member per annum. Alexandra Tourism and Traders has around 30 members.

6.5.4. KINGLAKE RANGES BUSINESS NETWORK

On behalf of its members Kinglake Ranges Business Network are committed to providing the following activities:

- Networking and Communication;
- Professional Development;
- Advocacy;
- Regional Promotion; and
- Local Marketing.

MEMBERSHIP

There are an estimated 35 members of Kinglake Ranges Business Network. The majority of these businesses are not tourism related.

6.5.5. LAKE EILDON HOUSEBOAT ASSOCIATION

OVERVIEW

The purposes of the LEHIA are to:

- To establish a peak body organisation for Lake Eildon businesses, tradespeople and industry stakeholders involved in houseboat construction, maintenance, transport, hire, sales and marketing;
- To investigate and recommend member benefits and accreditation standards for houseboat construction, maintenance and sales;
- To facilitate dialogue and collaboration between land and water managers, relevant government agencies, tourism and industry stakeholders; and
- To promote the sustainable development of Lake Eildon and the houseboat industry.

MEMBERSHIP

There are around 30 members of the Lake Eildon Houseboat Association including houseboat operators and businesses which service the sector.

6.5.6. EILDON ACTION

Eildon Action is a small local business and community group that undertakes a range of community and business activities.

These include:

- Providing visitor information services;
- Undertaking community and business events; and
- Local promotion.

6.5.7. MURRINDINDI FOOD AND WINE INC

OVERVIEW

The Murrindindi Food Wine and Culture Group was formed in 2000.

Services offered include:

- The ability to connect with a network of likeminded industries,
- Advice for new operators by experienced operators; and
- Networking.

MEMBERSHIP

There are around 20 members of the Murrindindi Food and Wine Inc.

6.6. STRATEGIC CONSIDERATIONS

- **Historic resources of Murrindindi Council for tourism.** The resources available to develop and promote tourism in Murrindindi historically have been much lower than similar municipalities. As an example, Indigo Shire has a tourism budget exceeding \$1.5 million. The limited resources available to tourism within Murrindindi means that Council has not been able to achieve affective marketing and awareness of the region's destinations.
- **Reliance on Local Tourism Associations.** Murrindindi Shire has many Local Tourism and Business Associations that have been long established. This has resulted in a lack of cohesion across the municipality and an inconsistent approach to digital media, marketing and awareness programs. Many of these LTA's have their own membership base, however resources are limited. There are very few Local Governments in Victoria that rely as greatly on the commitment of Local Tourism Associations to operate visitor information centres, provide networking and marketing initiatives.
- **Murrindindi wide approach to tourism.** Discussions with the Local Tourism Associations highlight a greater willingness to work collaboratively. Delivery of visitor services, online presence, social media and information centres at a Murrindindi wide level will better utilise the resources available. Visitor information if delivered at a Murrindindi wide level will promote greater dispersal. An example of this is a Murrindindi wide map that encourages visitors to tour and travel the municipality.
- **One brand.** It remains difficult to deliver one brand in the marketplace for Murrindindi as the Council name of Murrindindi has limited awareness in Melbourne and is also the name of a location within the Shire. This is one area that needs further thought and consideration in the strategy.
- **Community run events.** Many of the events operated in the Shire are reliant on local communities. The long-term viability of some of these events is in question due to volunteer burn out. There is a need to for Council to provide more support to events that drive visitation and yield in Murrindindi.
- **Opportunity to leverage from the Yarra Valley Region.** Yarra Ranges Shire attracts almost 3 million visitors per annum. The Yarra Ranges has one of the highest levels of visitation of any Council in the State. The opportunity to capture this market is substantial, particularly for Marysville, Buxton and Kinglake which are on the doorstep of the Yarra Valley. Further alignment and targeted marketing directed to Yarra Valley visitors provides an opportunity to grow visitation.
- **Costs to work with Yarra Ranges Tourism.** The cost for membership and also buy into marketing and collateral for Yarra Ranges Tourism is prohibitive for many operators. As Yarra Ranges has much larger tourism operators the pricing reflects this.
- **Working with Mansfield and the High Country.** Whilst Murrindindi is located in close proximity to the Melbourne and the Yarra Valley it has a stronger product alignment with the High Country. The mountain, streams and Lake Eildon product has much in common with Mansfield and the visitor profile is also similar to Mansfield. Murrindindi should consider how to collaborate with Mansfield and the High Country with regards to the Great Victorian Rail Trail and Lake Eildon which is shared by both Shires.
- **Tourism North East resources.** Tourism North East has one of the largest pool of resources and historically is one of the highest performing Regional Tourism Boards in Victoria. Tourism North East provides an opportunity for Murrindindi to leverage from its excellence in tourism marketing, online content and industry specialisations in cycling, nature and food and wine tourism.
- **Budget allocated to business grants.** There is a substantial level of Murrindindi Shire's budget allocated to tourism and business grants compared to similar regional Councils. This impacts on the staff resources that can be allocated to provide industry development and marketing support.

6.7. PROPOSED GOVERNANCE STRUCTURE

Based on the analysis of resources, regional tourism organisations and local tourism organisations, the following structure is proposed:

1. Streamline the number and scope of local tourism associations in relation to the four sub regions of Murrindindi. This will build on existing structures.
 - Marysville Triangle – Branded as Marysville/Lake Mountain
 - Alexandra /Lake Eildon – Branded as Lake Eildon /Alexandra and Surrounds
 - Yea Tourism and Business (incorporating the Y Centre) – Branded as Yea and Surrounds
 - Kinglake Ranges Tourism – Branded as Kinglake Ranges
2. Establish a closer relationship with Tourism North East and Yarra Ranges Tourism to support marketing and industry development activities for destinations aligned with those areas. This may be through an MOU or other agreement to allow flexibility to buy into programs such as Ride High Country.
3. Establish a larger marketing and events budget within Murrindindi Shire that is made accessible to businesses and the local tourism associations to support marketing and events activities for each destination. This will support Council to provide a 1:1 funding support for businesses and LTAs

that wish to buy into Yarra Ranges, Tourism North East or GRVT marketing activities.

4. Review Councils tourism and economic development budget with consideration of the following:
 - Expand Yea VIC coordinator role to be Visitor Services Coordinator across the Shire.
 - Seek to move some funding from business grant programs to grow marketing and events budget.
5. Tourism and events coordinator to include LTA development and liaison as a key area of focus.
6. Consider Regional Tourism Board alignment following the completion of the State Government led Regional Tourism Review.

7. MARKETING AND VISITOR INFORMATION SERVICES

7.1. INTRODUCTION

This section of the report provides an overview of marketing activities undertaken to promote the Murrindindi region and visitor services by local tourism associations including:

- Yarra Ranges Tourism Association;
- Alexandra Traders and Tourism Association;
- Marysville Triangle Business and Tourism Inc; and
- Lake Eildon Tourism.

The review of marketing activities and visitor information services undertaken includes:

- Identification of Murrindindi's digital presence, including websites and social media platforms;
- Identification of marketing activities undertaken by Murrindindi Shire;
- The current Visitor Information Centre network in Murrindindi; and
- The current performance of the Visitor Information Centres in Murrindindi.

7.2. KEY FINDINGS

Murrindindi Shire has a well-developed network of Visitor Information Centres, with four VICs including two accredited VICs in Yea and Marysville.

Marysville and Yea VICs are performing relative well with around 30,000 visitors to the Yea VIC annually and 40,000 visitors to the Marysville VIC annually. Whilst there has been some decline of visitors to the Marysville VIC in recent years, this aligns with a general reduction of visitors using physical VICs across Victoria with digital information now a preference for most visitors.

The Eildon and Alexandra VICs have significantly lower visitation than Yea and Marysville. This is attributed to lower levels of visitation to each of these individual destinations by visitors and lack of collocated product to strengthen the appeal of the VICs. In the case of the Yea VIC it is collocated with Y Water Discovery Centre which attracts visitors to the precinct, as does the Marysville VIC which is collated with an art gallery space.

With such low visitation to Eildon VIC, it is unsustainable to maintain a standalone VIC presence in the town. Eildon is also highly seasonal and has very low mid-week visitation. Collocation of visitor services with a retailer in town would provide an adequate approach for visitor services in Eildon.

In the case of Alexandra, collocation with a nature-based hub which includes bike hire, canoe hire and outdoor activity tour operators would strengthen the number of visitors to the VIC and provide a much-needed destination for nature-based visitors.

The marketing and digital presence aligned to each of the sub regional LTAs needs further investment. Given that Murrindindi's destinations have strong alignment with High Country, Yarra Ranges and Goulburn River Valley, there is a need to work with these organisations to strengthen each destinations presence in the marketplace. There is a need for further investment in marketing aligned to sub regional destination brands by Murrindindi Shire in order to grow brand recognition and drive visitation.

7.3. DIGITAL MEDIA AND ONLINE VISITOR SERVICES

Regional branding and marketing for destinations within Murrindindi is delivered by a number of organisations which have their own digital platforms. Below are examples of some of the visitor websites of key organisations.

The websites that utilise contemporary smart phone/lpad friendly design include:

- Marysville Tourism, and
- Great Victorian Rail Trail.

A number of the LTA websites utilise aging platforms and the quality of the content is variable across them.

In order to create a consistent approach to digital visitor information services it is recommended that the LTA websites be developed using one digital platform. Similar to the approach used by Tourism North East, whereby all destinations share one platform.

It is critical that consistency is achieved across the LTA digital platforms. These should become the key place for accessing information. They should be motivational and informative, and they should encourage dispersal across Murrindindi.



Y Water Discovery Centre

Website Address: <https://www.ywatercentre.com.au/>

Organisation: Yea Visitor Information Centre

Designed By: Omni Potent Solutions

Accommodation Booking: No

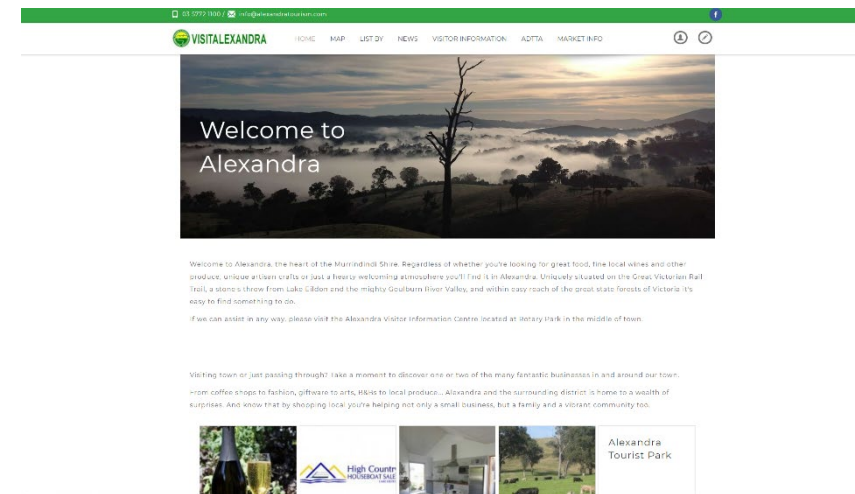
Mobile Friendly: Yes

Website Design and Quality: Moderate website design and quality

Searchability: Good

Strengths: User ability.

Weaknesses: Content is outdated and very limited information.



Alexandra Tourism

Website Address: <http://www.alexandratourism.com>

Organisation: Alexandra Traders and Tourism Association

Designed By: Regional Business Toolkit

Accommodation Booking: No

Mobile Friendly: Yes

Website Design and Quality: Moderate website design and quality

Searchability: Excellent

Strengths: Product filtering tool.

Weaknesses: Content is outdated and select features unable to be used.



Marysville Real. Close.

Website Address: <http://www.marysvilletourism.com/>

Organisation: Marysville Triangle Business and Tourism Inc

Designed By:

Accommodation Booking: No

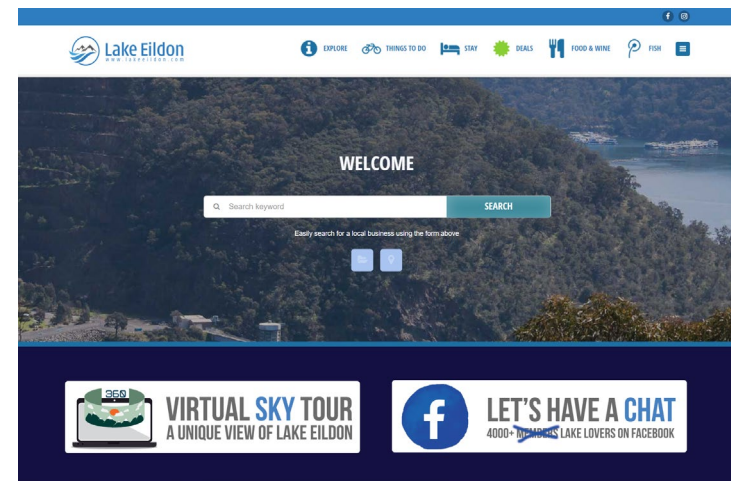
Mobile Friendly: Yes

Website Design and Quality: High contemporary website design

Searchability: Excellent

Strengths: User ability and layout, use of images and the homepage.

Weaknesses: Newsletter sign up difficult to use.



Lake Eildon

Website Address: <https://www.lakeeildon.com/>

Organisation: Lake Eildon Tourism

Designed By: Turbo 360

Accommodation Booking: No

Mobile Friendly: Yes

Website Design and Quality: High contemporary website design

Searchability: Excellent

Strengths: User ability and layout, use of images, virtual sky tour and live feed tools, product interactive maps and search feature.

Weaknesses: The discussion tool is not correctly linked to the Lake Eildon Facebook feed.

7.4. PHYSICAL VISITOR INFORMATION SERVICES

OVERVIEW OF NETWORK

There are currently 4 centres providing visitor information services within the Murrindindi region; Marysville Visitor Information Centre, Yea Visitor Information Centre, Alexandra Visitor Information Centre and Eildon Visitor Information Centre.

Two of these centres (Yea and Marysville) are accredited level 1 VICs and utilise paid staff to operate.

Marysville VIC is a recently constructed building following the Black Saturday bushfires and is collocated with an art gallery which assists in driving visitation to the VIC. The Y Water Discovery Centre in Yea is a newly constructed VIC, collocated with the Yea Wetlands and environmental experience.

The Eildon Visitor Information Centre is not accredited and has aging infrastructure. The quality of the building and presentation of information is not at the standard of other VICs in the region and it is reported that opening hours advertised are not being met. The Centre is delivered by volunteer staff with very little assistance by Murrindindi Shire.





The Alexandra VIC is operated by the local business and tourism group. The VIC receives minimal resources from Murrindindi Shire, however it is well located in the context of Alexandra and the building is in generally good condition. The presentation of visitor information services within the building is not to the standard of Yea and Marysville which have greater resources behind them.

There is opportunity to explore a the role of the Alexandra VIC as a nature based hub, strengthening the role of Alexandra at the heart of a nature based region. This could explore the provision of bike hire, canoe /kayak hire and access to nature based tour guides. A partnership with the Outdoor Education Group could be explored.

F31. Y WATER DISCOVERY CENTRE AT YEA VIC



T14. VISITOR INFORMATION CENTRE NETWORK

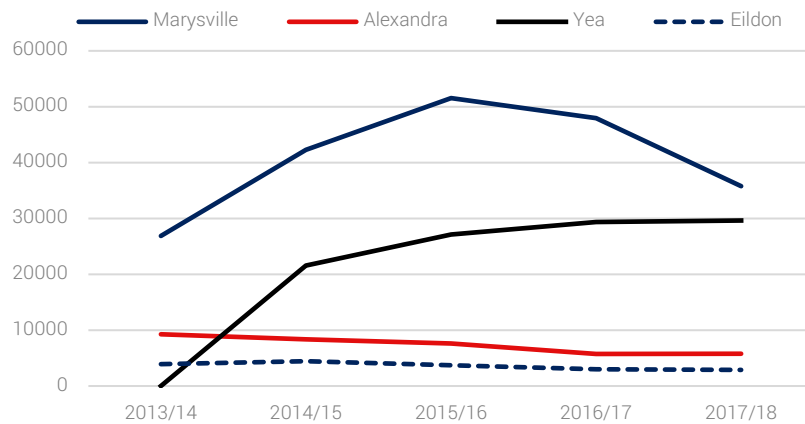
VIC	Operated by	Website	Opening hours	Accreditation	Phone/email	Complementary attraction	Building quality
<p>Marysville Lake Mountain VIC</p> 	Marysville Tourism	www.marysvilletourism.com	10am – 4pm Daily	Level 1	Yes	MiRA (Art gallery/Art space)	New
<p>Yea VIC</p> 	Y Water Discovery Centre	www.ywatercentre.com.au	9am-5pm Daily	Level 1	Yes	Y Water Discovery Centre	New
<p>Alexandra VIC</p> 	Alexandra Traders and Tourism Association	www.alexandratourism.com	9am-5pm Daily	No	Yes	Rotary Park	Aging
<p>Eildon VIC</p> 	Lake Eildon Tourism	www.lakeeildon.com	10am-2pm, Daily	No	Yes	No complementary attraction.	Aging

VISITOR INFORMATION CENTRE PERFORMANCE

VISITATION

Marysville VIC has had the highest number of walk in visitors over the past 5 financial years, attracting an average of 40,880 visitors per year, followed by Yea (21,532 visitors) as shown in Figure F32. It is noted that the Marysville VIC has experienced a decline in the number of walk-in visitors in recent years. This is in line with declines across walk in visitor to VICs in Victoria as use of digital information increases.

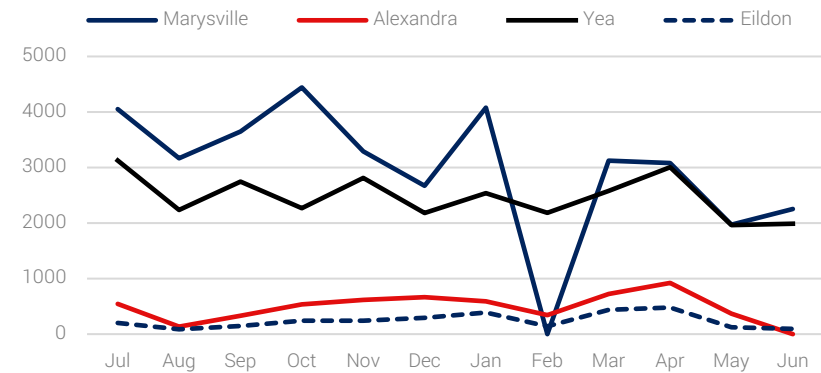
F32. WALK IN VISITATION TREND



Source: Murrindindi Shire Council, 2018.

Figure 33 identifies the walk-in seasonality of visitors to each VIC in 2017 / 18, with the highest number of walk-ins across the four VICs occurring in July (7,924), January (7,595) and April (7,485). It is noted no data was available for the number of walk-in visitors to the Marysville VIC in February.

F33. WALK IN SEASONALITY 2017 / 18

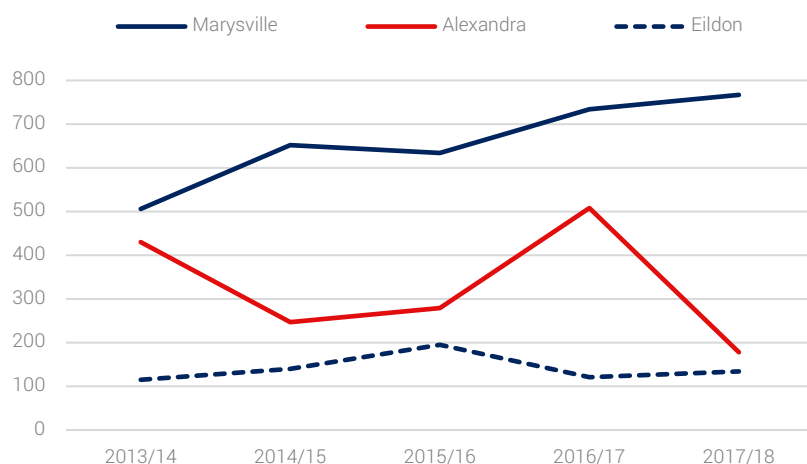


Source: Murrindindi Shire Council, 2018.

Figure F34 below identifies the phone enquiry trends of each VIC over the past 5 years. Marysville has the greatest number of phone enquires, receiving on average 659 calls per year, followed by Alexandra (328 per year).

It is noted no phone enquiry data is available for Yea.

F34. PHONE ENQUIRIES TRENDS



Source: Murrindindi Shire Council, 2018.

Table T15 below identifies the visitor capture rate of Murrindindi VICs in 2017 / 18 was 8.3%.

T15. WALK IN VIC CAPTURE RATE 2017 / 18

Walk in Visitors to VICs	Number of Visitors	Visitor Capture of VICs (%)
74055	895,787	8.3%

Source: Urban Enterprise, 2019.

7.4.1. RESOURCES

OPERATING BUDGET

The total Council expenditure for VICs within Murrindindi was \$121,711 in 2019 / 20, which includes:

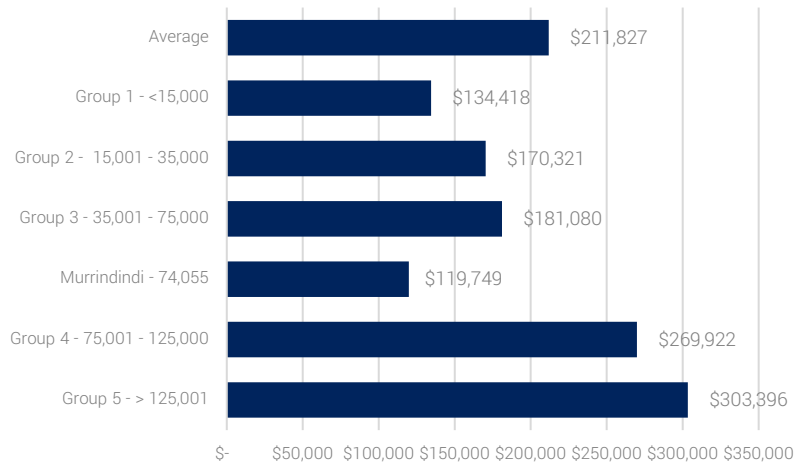
- Visitor services training \$4,750
- Alexandra Support \$4,437
- Eildon Support \$1,166
- Kinglake Support \$200
- Marysville Support \$2,608
- Yea Support \$6,435
- Yea Staffing Resources (includes Shire wide VIC Coordination) \$102,115

BENCHMARKING OF RESOURCES

Murrindindi Shire currently contributes \$121,711 (2019 / 20) to delivering visitor information services throughout the Council region. The expenditure dedicated to the operation of the VIC network is below the average for VICs, receiving between 35,000 and 75,000 enquires (\$181,080). The benchmarking data shows that Council expenditure is lower for other similar sized VICs operated by Local Government as identified in Figure 41.

Utilising the Local Tourism and Business Associations to operate visitor information services greatly reduced the costs associated with visitor services for Murrindindi Shire.

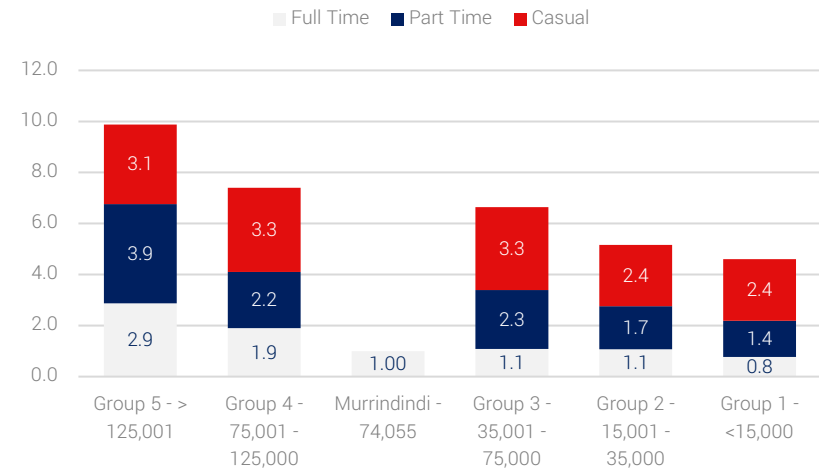
F35. VISITOR INFORMATION CENTRE EXPENDITURE BY SIZE



Source: Murrindindi Shire Council, 2018 and Vic Futures Report.

Only one VIC within Murrindindi utilises Council Staff resources, with Council providing support to the Yea VIC in the form of one full time staff member. The benchmarking data shows that this is less than the number of staff resources allocated for other similar sized VICs operated by Local Government, as identified in Figure 36.

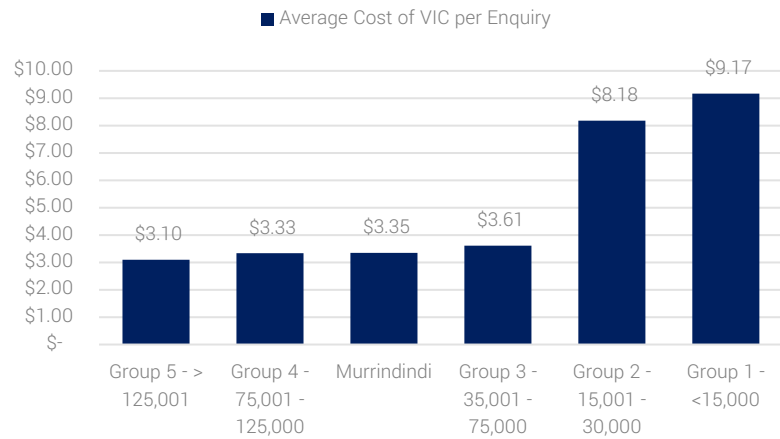
F36. STAFF RESOURCES



Source: Murrindindi Shire Council, 2018 and Vic Futures Report.

Figure F37 shows that the cost to deliver visitor services to walk in visitors to the Murrindindi VICs is an average of \$3.35, below the average for those of a similar size (\$3.61).

F37. COST OF VIC DELIVERY PER ENQUIRY 2017 / 18



Source: Murrindindi Council, 2018 and Vic Futures Report.

7.5. KEY COLLATERAL

In conjunction with the digital presence and VIC network, a number of collateral documents are published for visitors to Murrindindi.

	<p>Discover Dindi</p> <p>Official Visitor Guide</p> <p>Key collateral for Murrindindi Shire, including calendar of events and other visitor information</p>
	<p>Ride Dindi</p> <p>DL brochure</p>
	<p>Great Victorian Rail Trail</p> <p>Pocket guide brochure</p> <p>(240 per box)</p>
	<p>Great Victorian Rail Trail</p> <p>DL brochure</p>
	<p>Discover Murrindindi</p> <p>A3 tear off map</p> <p>(50 per pad)</p>

7.6. MARKETING ACTIVITIES

Murrindindi Shire undertakes a number of activities to market the region as a tourism destination. Activities undertaken in 2017 / 18 include:

T16. MURRINDINDI SHIRE MARKETING ACTIVITIES

Type of Marketing	Activities
Collateral	<ul style="list-style-type: none"> Updating and printing A3 Discover Murrindindi tear off maps; Calendar of Events brochure published in October and April; Provide collateral to event organisers.
Traditional Media	<ul style="list-style-type: none"> TV shows including Eat Play & Stay (Foxtel), Merv Hughes Fishing (Free-to-air), Newspaper articles including '6 Reasons to Visit (The Age);
Online Media	<ul style="list-style-type: none"> Building an online presence through the Discover Dindi website and corresponding social media pages / accounts (Facebook and Instagram); Murrindindi What's On e-newsletter – a weekly e-newsletter is produced and circulated by council showcasing the upcoming month's events.
Other	<ul style="list-style-type: none"> Updating of photo library (2,000 new images) and providing of content to websites as needed; Update and install new tourism information boards Application to VicParks for Marysville in the 'Community Welcomes RV Program'. Jayco Herald Sun Tour, 2018 – provided Discover Dindi postcards, stickers and brochures.

Murrindindi also undertook a number of partnership marketing activities, including with GRVT and Tourism North East. An overview of these activities undertaken are outlined below.

T17. PARTNERSHIP MARKETING ACTIVITIES

Type of Marketing	Activities
Collateral	<ul style="list-style-type: none"> • Provided content and advice for new A3 Kinglake Ranges tear off map – For Kinglake Ranges Business Network
Traditional Media	<ul style="list-style-type: none"> • Feature in Herald Sun
Online Media	<ul style="list-style-type: none"> • Online publication of One Hour Out publication - GRVT
Other	<ul style="list-style-type: none"> • North by North East additions to image library (80 additional images) • GVRT Billboard feature in partnership with Tourism North East for the Ride High campaign;

7.7. SOCIAL MEDIA ACTIVITIES

Other digital media utilised to market the Murrindindi region is through social media platforms including Instagram and Facebook.

INSTAGRAM



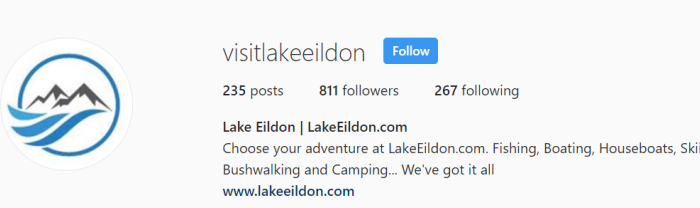
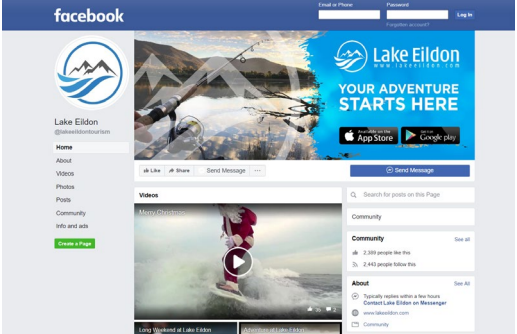
Current active Instagram pages marketing the Murrindindi region are outlined below. The accounts which the greatest number of followers is the Visit Yarra Valley, with 11,400 followers, followed by Visit Heart of Victoria with 2,881 followers.

Of the four accounts identified below, 3 utilised hashtags to promote user engagement, with Visit Yarra Valley utilising 3 hashtags which combined, have in total over 1 million posts. The Lake Eildon account does not utilise hashtags.

FACEBOOK

Current active Facebook pages marketing the Murrindindi region are outlined below. The accounts which the greatest user likes and followers are the Yarra Valley and Dandenong Ranges (55,861 likes and 55,088 followers) and Discover Dindi (11,016 likes and 11,120 followers).

F38. INSTAGRAM ACCOUNTS

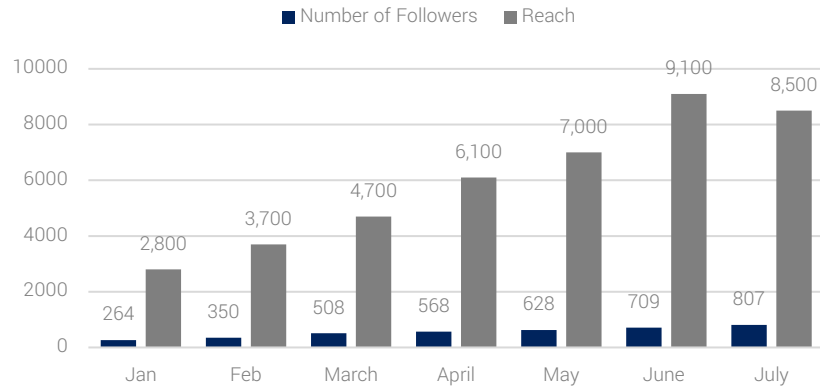
Instagram Account	Engagement	Facebook Account	Engagement
Discover Dindi			
 <p>discoverdindi Follow</p> <p>292 posts 1,491 followers 1,353 following</p> <p>Discover Dindi Official page highlighting the best of Murrindindi: from Marysville to Kinglake, Alexandra to Eildon, Yarck and Yea. Tag #discoverdindi to be featured www.discoverdindi.com.au</p>	<p>292 Posts</p> <p>1,491 Followers</p> <p>1,353 Following</p> <p>Hashtags:</p> <p>#discoverdindi (2,039 posts)</p>	 <p>facebook</p> <p>Discover Dindi @discoverdindi</p> <p>Discover Dindi added 5 new photos.</p> <p>RATED #1 BY TRIPADVISOR</p> <p>THINGS TO DO IN TOOLANGI</p> <p>Rated #1 by TripAdvisor, the Witravilla Rainforest Walk should definitely be on your bucket list. The boardwalk circuit takes in the sounds and scents of the rainforest. The environment is cool, damp and characterised by Myrtle Beech and Sassafras trees. The walk is approximately 2km in length, so a great one for families with little ones in tow. A grade 2 walk, it's suitable for most ages and fitness levels. ... See more</p>	<p>11,016 likes</p> <p>11,120 followers</p>
Lake Eildon			
 <p>visitlakeeildon Follow</p> <p>235 posts 811 followers 267 following</p> <p>Lake Eildon LakeEildon.com Choose your adventure at LakeEildon.com. Fishing, Boating, Houseboats, Skiing Bushwalking and Camping... We've got it all www.lakeeildon.com</p>	<p>235 posts</p> <p>811 Followers</p> <p>267 Following</p>	 <p>facebook</p> <p>Lake Eildon @lakeeildon</p> <p>YOUR ADVENTURE STARTS HERE</p> <p>App Store Google Play</p> <p>Videos</p> <p>More Videos</p> <p>Typically replies within a few hours</p> <p>Contact Lake Eildon on Messenger</p> <p>www.lakeeildon.com</p>	<p>2,389 likes</p> <p>2,443 followers</p>

7.7.1. SOCIAL MEDIA ACTIVITY PERFORMANCE

INSTAGRAM

Figure 39 identifies the number of followers and the reach of the Discover Dindi Instagram page. It is identified that the number of followers and the reach of the page has been steadily increasing, with 8,500 people reached in July 2018 compared to 2,800 in January.

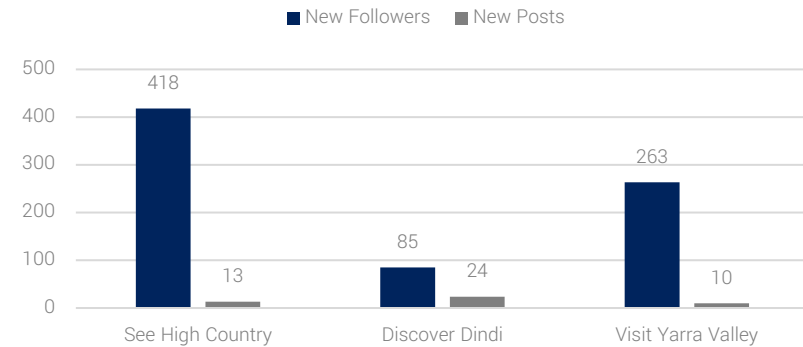
F39. DISCOVER DINDI INSTAGRAM PAGE FANS AND REACH



Source: Forest Media, Instagram Reports January to July (excluding March) 2018.

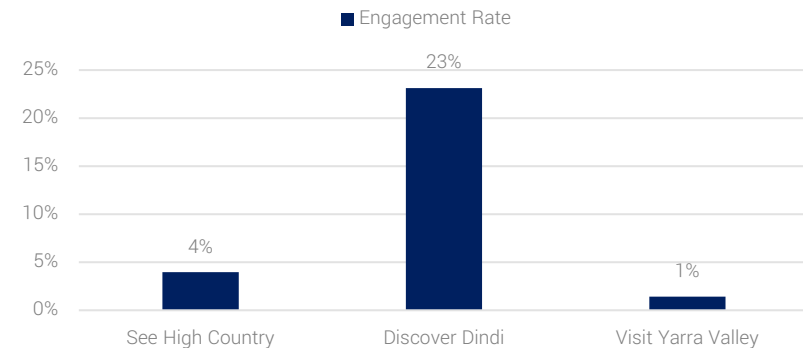
Figure 40 and Figure 41 provide a comparison of the performance of Discover Dindi, Visit Yarra Valley and See High Country Instagram pages. It is identified that Discover Dindi has an average of 85 new followers per month which is lower than the average new followers of the Visit Yarra Valley (263) and See High Country (418). However, Discover Dindi has a greater average monthly engagement rate (23%) than the competing regions.

F40. COMPARISON OF COMPETING REGIONS FACEBOOK REACH



Source: Forest Media, Instagram Reports January to July (excluding March) 2018.

F41. INSTAGRAM ENGAGEMENT RATE



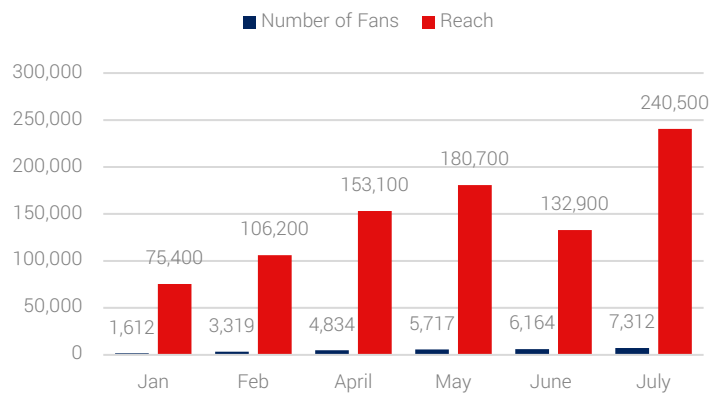
Source: Forest Media, Instagram Reports January to July (excluding March) 2018.

FACEBOOK

Figure 42 identifies the number of fans and the reach of the Discover Dindi Facebook page, which was launched in January 2018.

It is identified that the number of fans and the reach of the page has been steadily increasing, with 240,500 people reached in July 2018.

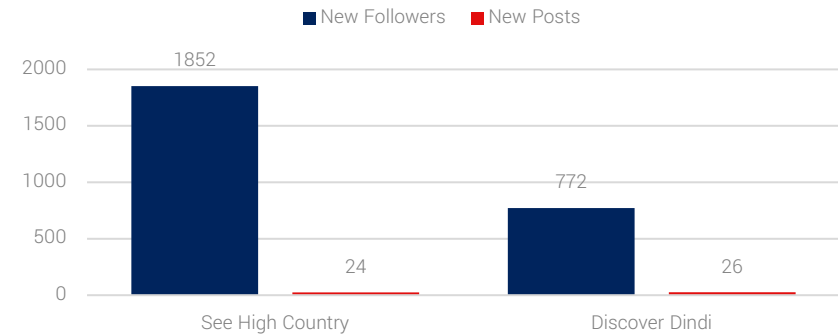
F42. DISCOVER DINDI FACEBOOK PAGE FANS AND REACH



Source: Forest Media, Facebook Reports January to July (excluding March) 2018.

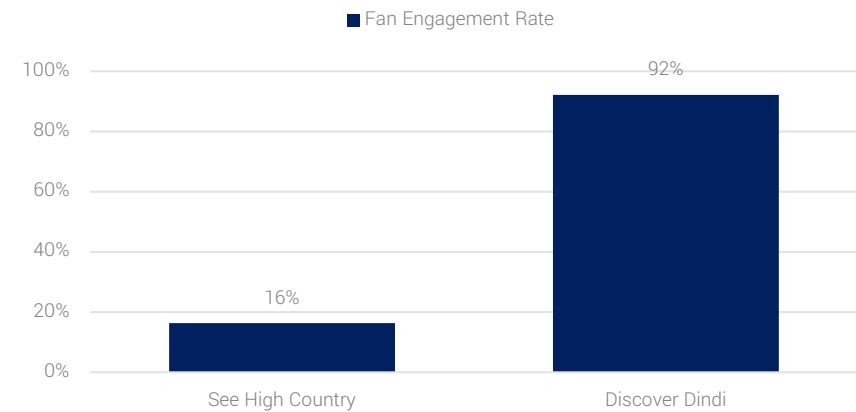
Figure 43 and Figure 44 provide a comparison of the performance of Discover Dindi and See High Country Facebook pages. It is identified that See High Country has a significant following, with 1,852 followers in comparison with the 772 followers of Discover Dindi. However Discover Dindi has a greater average fan engagement rate of 92% compared with See High Country's 16%.

F43. COMPARISON OF COMPETING REGION FACEBOOK REACH



Source: Forest Media, Facebook Reports January to July (excluding March) 2018.

F44. ENGAGEMENT RATE



Source: Forest Media, Facebook Reports January to July (excluding March) 2018.

7.8. STRATEGIC CONSIDERATIONS

- **Low cost of operating VICs.** Murrindindi Shire relies on the support of Local Tourism Associations to operate VICs within Murrindindi. The Council only spends \$121,711 across the four VICs which is one of the lowest expenses for visitor information centre delivery in Victoria. Murrindindi does not have the financial capacity to operate all of the Visitor Information Centres without the support of the Local Tourism Associations.
- **Lack of consistency across visitor information services.** There is a lack of consistency across visitor information service delivery in Murrindindi Shire due to the reliance on Local Tourism and Business associations. This is in relation to the websites, social media and physical information centres.
- **Need for more guidance and support by Murrindindi Shire.** In order to improve consistency and quality of visitor information services in Murrindindi Shire, there is a need for Murrindindi Shire to provide better coordination of physical visitor information services and digital platforms.
- **Low performance of Eildon VIC.** The Eildon VIC is aging and is not operating to the level of other VICs in the Murrindindi. This is the result of lack of volunteers, limited financial resources and lack of consistent visitor numbers to Eildon township.
- **Low demand for Eildon and Alexandra VICs.** The number of visitors to both the Eildon and Alexandra is exceptionally low. Eildon attracted only 2800 and Alexandra attracted 5,700 walk in visitors. This is not considered a sustainable level of visitation to VICs, given the level of volunteer support, management and building maintenance required to deliver a high-quality visitor experience.
- **Nature based hub at Alexandra VIC.** Alexandra acts as a hub for the vast number of nature-based visitors to Lake Eildon, Eildon National Park, the Goulburn River and tributaries and Rubicon Historic area. There is opportunity for Alexandra VIC to become a nature-based hub where visitors can access bike hire, kayak and canoe hire and organise tours.
- **LTA based marketing plans.** The Local Tourism Associations undertake various levels of marketing, however these are not generally supported by rigorous marketing plans and do not leverage enough from regional tourism structures. Urban Enterprise recommends that Murrindindi Shire undertake a marketing plan for each of the four sub regional LTA structures proposed in this plan. This includes:
 - Marysville/Lake Mountain
 - Lake Eildon/Alexandra sub region
 - Yea and surrounds;
 - Kinglake Ranges.

7.9. PROPOSED VISITOR INFORMATION SERVICES STRUCTURE

Having reviewed the provision of visitor information services for Murrindindi Shire Council, Urban Enterprise recommends the following structure for visitor information services delivery.

Region	Web Presence	Physical VIC Presence	Key Product Brands	Additional Considerations
Murrindindi Shire	Provision of new platform to support LTAs Continue to Discover Dindi, however key focus will be sub regional destinations	Transportable temporary VIC (e.g.: St Kilda Kombi). To be used at key events.	Great Victorian Rail Trail Lake Eildon Marysville Lake Mountain	Need for coordinator to oversee all visitor services Potential need for another 0.5 EFT to allow coordinator to move across VICs
<i>Marysville/Lake Mountain</i>	Marysville /Lake Mountain destination website	Marysville VIC – Art gallery focus	Lake Mountain, Marysville Cathedral Ranges, Narbethong, Buxton	Continue alignment with Yarra Ranges
<i>Lake Eildon/Alexandra</i>	Lake Eildon/Alexandra website (partner with Mansfield)	Alexandra NBT Hub VIC Collocation of visitor information with retail shopfront	Lake Eildon Taggerty Rubicon Historic Area Lake Eildon National Park Goulburn River and Tributaries	Create a sub-regional LTA, and align visitor services to this including new destination website and closure of Eildon VIC.
<i>Yea and Surrounds</i>	Yea and Surrounds website	Y Water Discovery Centre	Goulburn River Farm gate and wine Tallarook and the Strathbogies	Develop a business plan to grow use of the Y Water Discovery Centre
<i>Kinglake Ranges</i>	Kinglake Ranges website	Include visitor information hub in Kinglake Pub or other retail outlet	Kinglake National Park	Have some physical information presence in Kinglake – e.g.: swap card rack and brochures

8. STRATEGIC CONSIDERATIONS

8.1. INTRODUCTION

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



Cathedral Lodge Golf Course, Alexandra

Source: Greg Norman Golf Course Design, 2018.

8.2. OVERARCHING STRATEGIC CONSIDERATIONS

- **Murrindindi Shire needs clear strategic direction.** There is a need for Murrindindi to have clear direction for tourism and get its 'own house in order' as a priority over alignment with Regional Tourism Boards. Murrindindi Shire has not had a very clear strategy with regard to marketing, brand and industry development needs, nor has it historically had the resources to deliver effective tourism development support. If Murrindindi has clear strategic direction, then it can influence what it needs from partners such as regional tourism organisations/boards.
- **Limited overnight visitor growth.** Murrindindi Shire has attracted limited growth in overnight visitors, whilst many other destinations with similar proximity to Melbourne have attracted significant growth in overnight visitors. There has been very little investment in accommodation product in Murrindindi which has limited growth in visitor capacity and furthermore Murrindindi's destinations have lacked a strong brand presence in the marketplace.
- **Unclear and inconsistent approach to brand, marketing and digital media.** One of the major issues with promotion of Murrindindi is the lack of resources dedicated to marketing Murrindindi's destinations which have potential to be elevated as iconic to Victoria. Investment in marketing action plans for each sub regional destination and product strengths is needed.
- **Lead with areas of competitive strengths.** Murrindindi needs to have a clear brand proposition in the marketplace. This means a marketing focus on its icons including Lake Eildon, Lake Mountain, Great Victorian Rail Trail and Marysville as well as well-known villages destinations such as Yea, Alexandra and Kinglake Ranges. Furthermore, a focus on promoting the niche competitive strengths to nature-based markets including: cycling, bushwalking, snow, fishing and hunting.

- **Fragmented governance.** Murrindindi Shire has a fragmented Governance structure with many LTAs and RTB/Os operating within the region. This has resulted in inconsistent approaches to visitor services, marketing and digital media. Greater leadership by Murrindindi Shire is needed to drive professionalism in Murrindindi Shire.

8.3. VISION

Murrindindi will transform into one of Victoria’s leading nature-based tourism destinations which is accessible to family markets, adult couples, nature-based tourism enthusiasts and emerging international markets. Murrindindi will strengthen its complementary tourism product including food and agribusiness and new and improved accommodation to meet contemporary market expectations and needs.

8.4. OBJECTIVES

- Deliver a streamlined approach to marketing and digital media;
- Murrindindi Shire to align with tourism organisations that can add value to tourism delivery;
- Grow overnight visitation;
- Reduce seasonality;
- Encourage visitor dispersal;
- Attract investment in private sector tourism product including food and agribusiness and visitor accommodation; and
- Attract funding for enhancement of public nature based assets to improve access, amenity and visitor experience.

8.5. DIRECTION A: DELIVER A STREAMLINED APPROACH TO INDUSTRY GOVERNANCE

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

There is a need to continue with industry networking, training and information distribution amongst the tourism industry to create a connected visitor economy.

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

STRATEGY 1 Improve and streamline local tourism structures.

STRATEGY 2 Improve alignment with regional tourism structures once Regional Review is completed, to deliver streamlined tourism governance.

STRATEGY 3 Tailor Councils tourism and economic development budget to better meet the needs of the tourism industry.

STRATEGY 4 Advocate on behalf of the visitor economy and promote industry collaboration.

8.6. DIRECTION B: DELIVER STREAMLINED AND EFFECTIVE MARKETING AND VISITOR INFORMATION SERVICES

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

Nature based tourism is the key motivator to visit the region for most visitors and there are a number of assets including Lake Mountain, Lake Eildon, National and State Parks and alpine river systems that are unique to Murrindindi in the context of Victoria.

In addition to destination marketing activities, the key brand attributes need to be reinforced in the delivery of visitor information services. This will assist in growing visitor dispersal and yield.

Murrindindi should consider leading with well-known brands already existent in the market place, including:

- Marysville/Lake Mountain;
- Lake Eildon/Alexandra and surrounds;
- Kinglake Ranges;
- Yea and surrounds; and
- Great Victorian Rail Trail.

Marketing of Murrindindi's destinations and product strengths should leverage from effort and resources already being dedicated by Yarra Ranges Tourism for Marysville/Lake Mountain and Kinglake Ranges, whilst Lake Eildon/Alexandra and Surrounds, Yea and Surrounds, Great Victoria Rail Trail, cycle and walk tourism can be promoted through the large marketing dollars being spent by Tourism North East.

Murrindindi Shire has a number of Visitor Information Centres that are operated cost effectively through the assistance of local tourism and business associations. It is not possible for Murrindindi Shire to fund the operation of all of these, therefore for their survival it is critical to maintain the support of local tourism and business groups.

STRATEGY 5 Build awareness of Murrindindi's leading destinations and competitive strengths. These include:

- **Marysville/Lake Mountain;**
- **Lake Eildon/Alexandra and surrounds;**
- **Kinglake Ranges;**
- **Yea and surrounds;**
- **Great Victorian Rail Trail; and**
- **NBT: Snow, Cycle, Walk, Fishing Tourism.**

STRATEGY 6 Deliver visitor information services for Murrindindi at all stages of the visitor journey to inspire and connect visitors to experiences.

8.7. DIRECTION C: DEVELOPMENT OF PRODUCT STRENGTHS AND INVESTMENT IN EMERGING OPPORTUNITIES AND SUPPORTING INFRASTRUCTURE

The Murrindindi Shire has product strengths in nature-based tourism. This is overwhelmingly the main driver of visitation to Murrindindi Shire. The emergence of food and agribusiness is one area which will positively influence growth in visitor yield and attraction of target visitor markets. The key strategic tourism product development opportunities that are considered include:

- Audits, investment and promotion of cycle tourism assets;
- Audits, investment and promotion of short and long walks;
- Improvements to physical infrastructure within parks assets;
- Nature based tourism, services and activities;
- Investment in a range of accommodation; and
- Investment in food, wine and agri tourism experiences.

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

Priority projects identified in the Goulburn River Valley Tourism Destination Management Plan, include:

- Canopy Tour, Kinglake/Toolangi;
- Wellness Resort, Yea & Surrounds;
- Great Victorian Rail Trail Expansion, and Accommodation and Product Development, GRV Region;
- Lake Eildon Waterfront Development Opportunities, Eildon;
- Eildon Pondage Development Opportunities, Eildon;
- Spa & Wellness Resort, Marysville; and
- Cycling Destination Development, Marysville.

- STRATEGY 7** Enhance the quality of nature based experiences with a focus on competitive advantages of Murrindindi in cycling, walking, fishing, hunting, boating and outdoor recreation.
- STRATEGY 8** Promote investment in visitor accommodation within Murrindindi Shire.
- STRATEGY 9** Continue to improve access and amenity of water based products.
- STRATEGY 10** Encourage and support investment in food, beverage and agribusiness tourism.
- STRATEGY 11** Promote touring through Murrindindi.

8.8. DIRECTION D: DRIVE TOURISM GROWTH TO MURRINDINDI THROUGH AN ENHANCED EVENTS CALENDAR

Murrindindi Shire is home to a number of signature events that drive visitation to the region. These include events such as the Alexandra Truck , Ute and Rod show, Marysville Jazz and Blues Weekend and Foggy Mountain Music Bluegrass Festival.

The development of events that drive visitation and yield to Murrurundi Shire should be a future focus. The enhancement of the events calendar should consider events that meet the following criteria:

- Attract 500 or more visitors during off peak periods;
- Align to product strengths of Murrindindi;
- Are multi day to encourage overnight visitation.

Funding should be considered for events that meet the above criteria and a target should be set for event attraction and visitor attraction to these events.

There is opportunity to leverage from the knowledge of organisations such as Alexandra Tourism and Traders and Marysville Triangle which have a long history of operating events.

STRATEGY 12 Deliver an enhanced event calendar which significantly grows visitation to Murrindindi Shire.

9. IMPLEMENTATION

9.1. INTRODUCTION

This section of the report summarises the key strategic considerations based on the product strengths, issues and opportunities.

T18. IMPLEMENTATION PLAN

Strategy		Action	Lead	Other Stakeholders	Timeframe (Year)	Indicative Cost	Potential Funding Source
Direction A: Deliver a streamlined approach to industry governance							
Improve and streamline local tourism structures.	A1	Establish a model or governance framework that: <ul style="list-style-type: none"> Provides advice regarding strategic and operational implementation of this strategy Takes over the role and function of Murrindindi Inc and LBTAs as appropriate Allow business buy-in to Murrindindi Shire, collaborative marketing activities 	MSC	Local Businesses	1	N/A	Businesses and LTAs to fund
Improve alignment with regional tourism structures once Regional Review is completed, to deliver streamlined tourism governance.	A2	Take an informed, strategic and specific stance regarding Council's participation at the Regional level.	MSC	All LTA's	1-2	TBC. Based on Regional Review	N/A - Businesses and LTAs to pay for membership
Tailor Councils tourism and economic	A3	Establish a larger marketing and events budget within Murrindindi Shire that is made accessible to businesses and the local tourism associations to support marketing and events activities for key products, experiences or	MSC	State Government	1-2	N/A – work within	MSC

Strategy		Action	Lead	Other Stakeholders	Timeframe (Year)	Indicative Cost	Potential Funding Source
development budget to better meet the needs of the tourism industry.		destinations. This will allow Council to provide funding support for businesses and LTAs that wish to buy into marketing activities of chosen RTB (depending on outcomes of Regional Review).				existing budget	
	A4	<p>Review Council's tourism and economic development budget with consideration of the following:</p> <ul style="list-style-type: none"> Expand Yea VIC coordinator role to be Visitor Services Coordinator across the Shire; Seek to move some funding from business grant programs to grow marketing and events budget; and Tourism and events coordinator to include LTA development and liaison as a key area of focus. 	MSC	Industry and LTAs	1-2	N/A – work within existing budget	MSC
Advocate on behalf of the visitor economy and promote industry collaboration.	A5	Undertake an annual Murrindindi tourism and events summit. The first summit will be utilised to present the Tourism and Events Strategy and outline a path forward to improve brand and destination recognition.	MSC	Industry and LTAs	2-3	\$10k	MSC
Direction B: Deliver Streamlined And Effective Marketing And Visitor Information Services							
Build awareness of Murrindindi's leading destinations and competitive strengths.	B1	<p>Develop destination marketing action plans in conjunction with regional and local stakeholders for key destinations. These include:</p> <ul style="list-style-type: none"> Key destinations and townships Lake Mountain Lake Eildon Great Victorian Rail Trail. 	MSC	Industry and LTAs	1-2	\$10k per region	
	B2	Establish clear terms for businesses to buy into collaborative marketing campaigns.	MSC	Industry and LTAs	1-2	N/A	N/A

Strategy		Action	Lead	Other Stakeholders	Timeframe (Year)	Indicative Cost	Potential Funding Source
						TBC. By Tourism North East	MSC
Deliver visitor information services for Murrindindi at all stages of the visitor journey to inspire and connect visitors to experiences.	B3	Ensure access to integrated web platform/s which showcase key locations, products and experiences	MSC	LTAs	2-3	\$10k per website	MSC
	B4	Visitor services coordinator to oversee development of collateral across each of the key destinations to ensure quality and consistency exists. This may consider: <ul style="list-style-type: none"> • One Murrindindi wide visitor guide; • A Murrindindi wide touring map; and • Destination product and experience maps. 	MSC	LTAs	2-3	\$20K	
	B5	Utilise the information in this strategy to further the review of the role, location and potential of all VICs in Murrindindi Shire	MSC	LTAs	1	\$10k	Private Sector/MS
	B6	Establish a touring VIC which can be used during peak periods at events.	MSC	LTAs/VIC staff	2-3		RDV
Direction C: Development Of Product Strengths And Investment In Emerging Opportunities And Supporting Infrastructure							
Enhance the quality of nature based experiences with a focus on competitive advantages of Murrindindi in cycling, walking, fishing, hunting,	C1	Develop an inventory of key regional cycling product that can be promoted through Tourism North East. This should consider the following: <ul style="list-style-type: none"> • Road cycling loops; • Gravel cycling loops; • Great Victoria Rail Trail; and • Mountain biking at Lake Mountain, Narbethong, Kinglake, Eildon and Buxton. 	MSC		1	\$5k	MSC

Strategy		Action	Lead	Other Stakeholders	Timeframe (Year)	Indicative Cost	Potential Funding Source
boating and outdoor recreation.	C2	Consider the Great Victoria Rail Trail Activation Plan prepared by Tourism North East.	MSC	Tourism North East	1		
	C3	Promote the top 20 walks in Murrindindi and advocate for improvements to enhance trails where needed.	MSC	Parks Victoria DELWP TNE YRVT	1	N/A	MSC
	C4	Advocate for improved access to and infrastructure at Mount Torbreck to support summer and winter visitation.	MSC	DELWP	2-3	\$40K	RDV

Strategy		Action	Lead	Other Stakeholders	Timeframe (Year)	Indicative Cost	Potential Funding Source
Promote investment in visitor accommodation within Murrindindi Shire.	C5	<ul style="list-style-type: none"> • Prepare an investment business case and investment attraction prospectus for the accommodation sector that highlights investment opportunities and demand drivers for each destination. Key opportunities identified include: <ul style="list-style-type: none"> • Self-contained accommodation/B&B and/or group accommodation units catering for the Nature Based Tourism experience; • Luxury accommodation for lifestyle leader market, including the emerging golf market; • Investment in nature-based accommodation and glamping; • High quality resort style accommodation in Eildon to improve and diversify the offer; • Farm stay and retreat style B&B accommodation to link with the development of wellness product; • Eco-lodge accommodation at Lake Mountain to diversify the product offer and attract year round visitation; • Lake Eildon resort accommodation; • Farm stay and B&B accommodation to link with the local produce offer in Marysville and to cater for weekend short-break visitors from the Melbourne market; • High quality self-contained accommodation in Yea; • Development of self-contained accommodation in Kinglake; and • Development of a tourist park on the Goulburn River. 	MSC	Engage consultant to deliver	1-2		
Continue to improve access and amenity of water based products.	C6	Consider the outcomes of the Lake Eildon Tourism Masterplan	MSC	TNE Mansfield Shire	2		
	C7	Partner with agencies to increase access to waterways for recreation purposes	MSC		2-3	TBC	

Strategy		Action	Lead	Other Stakeholders	Timeframe (Year)	Indicative Cost	Potential Funding Source
Encourage and support investment in food, beverage and agribusiness tourism.	C8	Support food, wine and agribusinesses to identify opportunities for investment	MSC	Local Businesses LTAs Murrindindi Food and Wine Inc	1-2	\$30k	RDV
Promote touring through Murrindindi.	C9	Establish a Murrindindi touring route that has route options linking various product with the Yarra Valley and High Country.	MSC	LTAs Tourism North East Yarra Ranges Tourism	2-3		State Government RDV
	C10	Develop an iconic international touring itinerary taking in Yarra Valley, Black Spur, Lake Eildon, Yea and Kinglake.	MSC	LTAs Tourism North East Yarra Ranges Tourism	3-4		State Government RDV
Direction D - Drive Tourism Growth To Murrindindi Through An Enhanced Events Calendar							
Deliver an enhanced event calendar which significantly grows visitation to Murrindindi Shire.	D1	Council to undertake an action plan for community centres including opportunities for corporate, social, arts and culture, and recreation events.	MSC	Community Groups	2-3	\$40k	RDV
	D2	Review grant funding provided to events to ensure that Murrindindi Shire is supporting events which: <ul style="list-style-type: none"> • Attract overnight visitors; • Attract visitors during the off peak; and • Align Discover Dindi brand. 	MSC		1-2	N/A – work within existing budget	
	D3	Investigate a working relationship with Business Events Victoria to deliver greater awareness of business event destinations.	MSC	Business Events Victoria LTAs	1-2 years		RDV

Strategy		Action	Lead	Other Stakeholders	Timeframe (Year)	Indicative Cost	Potential Funding Source
	D4	<p>Promote opportunities for establishment of new events that align to the Murrindindi Shire's strengths. This may include:</p> <ul style="list-style-type: none"> • Nature based and adventure events; • Food and wine events; • Car club events; • Fishing events and exhibitions; • Cycle events; and • Music events. 	MSC	LTAs	2-3 years		RDV



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